



# **EU Market**

**Civil Dialogue Group Arable Crops  
Cereals, Oilseeds, Protein Crops**

**6<sup>th</sup> February 2018**



# Contents

## 1. 2017/18 MY Cereals

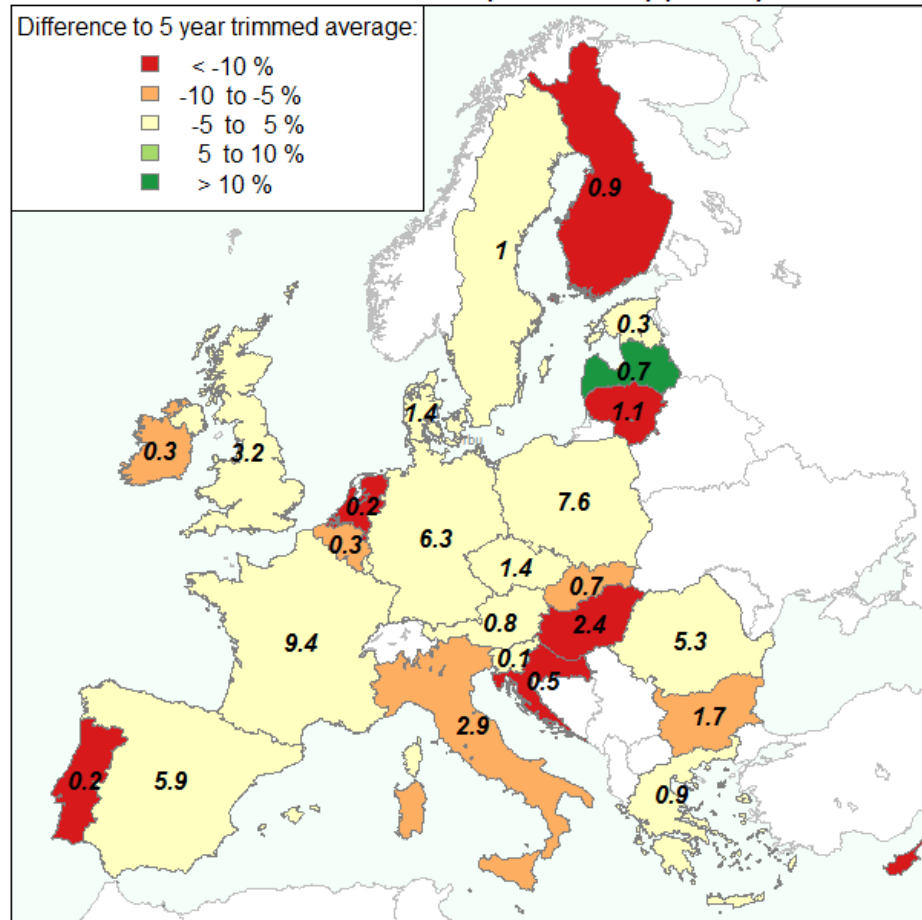
## 2. 2017/18 MY Oilseeds and Proteins

## EU 28- 2017 Area Forecast

EU EVOL CEREALS AREA					
Million ha	2015	2016	2017 Déc fcst	2017 Jan fcst	% change 2016/2017
<b>TOTAL</b>	<b>57,3</b>	<b>56,8</b>	<b>55,5</b>	<b>55,5</b>	<b>-2,3</b>
Soft wheat	24,3	24,3	23,4	23,4	-3,6
Durum wheat	2,5	2,8	2,7	2,7	-4,4
Barley	12,2	12,3	12,1	12,1	-1,5
Maize	9,2	8,6	8,4	8,4	-2,0
Rye	2,0	1,9	2,0	2,0	2,9
Oats	2,5	2,6	2,8	2,7	3,1

Sources : DG AGRI - G4

### All cereals area 2017 ( million ha ) (f'cast.)



EU28 area : 55.5 ( million ha ) Difference to 5 year trimmed average: -4 %

## EU 28- 2017 Production Forecasts

EU EVOL CEREALS USABLE PRODUCTION					
Million tonnes	2015/2016	2016/2017	2017/2018 Déc fcst	2017/2018 Jan fcst	%change 2016/2017
<b>TOTAL</b>	<b>311,5</b>	<b>296,7</b>	<b>306,3</b>	<b>305,5</b>	<b>3,0</b>
Soft wheat	151,3	133,9	142,0	141,5	5,7
Durum wheat	8,3	9,6	9,4	9,4	-2,1
Barley	61,4	59,4	58,8	58,6	-1,3
Maize	59,0	62,8	64,6	64,5	2,7
Rye	7,6	7,2	7,2	7,2	0,0
Oats	7,5	8,0	8,1	8,1	1,3

Sources : DG AGRI - G4

# EU 28 - 2017 Production Forecast

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

FR	26,2%
DE	0,5%
PL	7,1%
IT	-7,6%
UK	3,9%
ES	-31,3%
HU	-16,0%
RO	24,7%

Sources : DG AGRI - G4

# EU 28 – 2017 Production Forecasts

**2017/2018 Marketing Year *usable production***

Million tonnes	<b>EC DG AGRI Jan</b>	Stratégie Grain Jan	Coceral Dec	ADM Europe Nov
<b>Total</b>	<b>305,5</b>	298,4	301,5	298,8
Soft Wheat	<b>141,5</b>	142,0	142	142,9
Durum Wheat	<b>9,4</b>	9,1	9	9
Barley	<b>58,6</b>	58,4	58,4	57,8
Maize	<b>64,5</b>	59,2	61,4	59,3
Rye	<b>7,2</b>	7,5	7,4	7,6

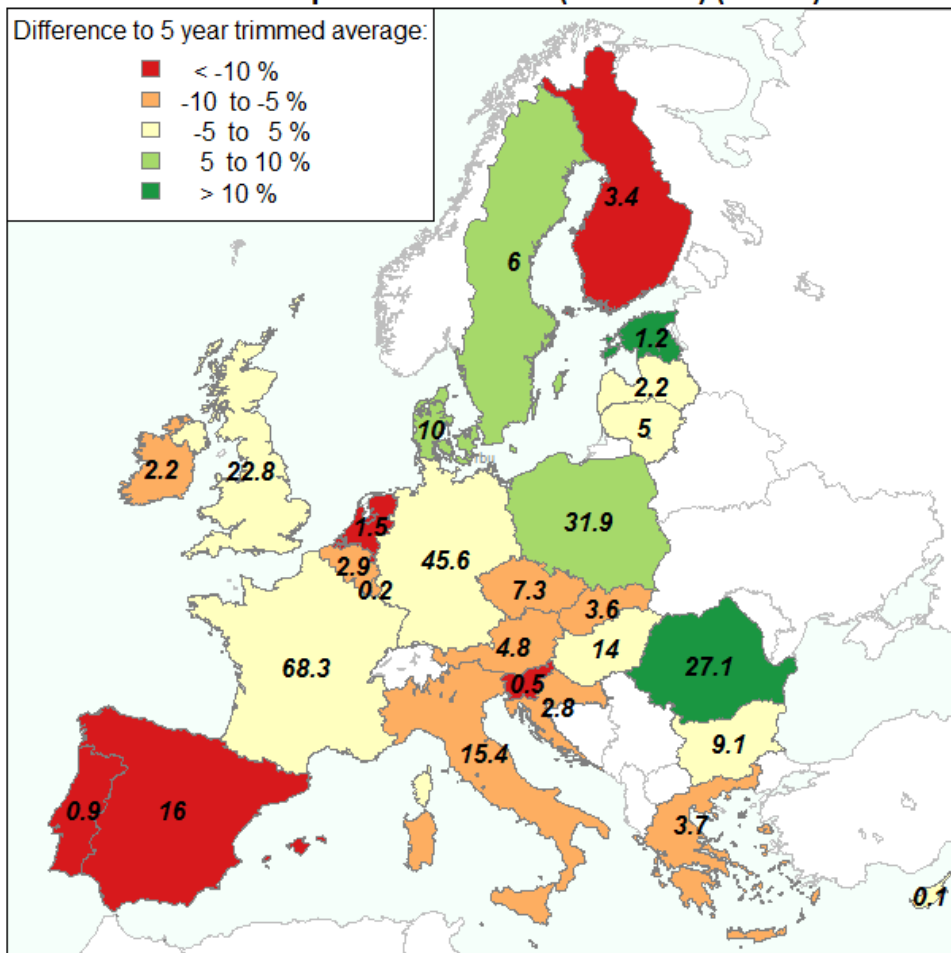


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### All cereals production 2017 ( million t ) (f'cast.)

Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %



EU28 production : 305.5 ( million t ) Difference to 5 year trimmed average: 0 %



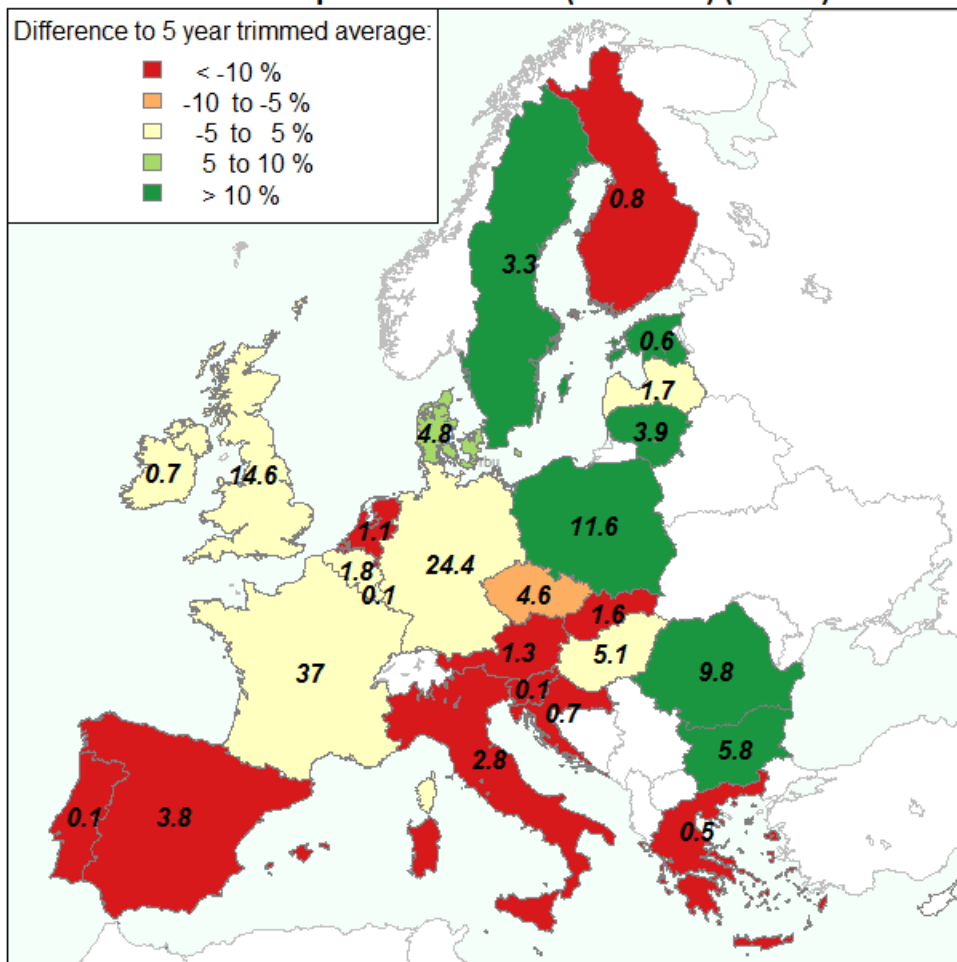


European  
Commission

## Soft wheat production 2017 ( million t ) (f'cast.)

Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %



EU28 production : 141.5 ( million t ) Difference to 5 year trimmed average: 2 %

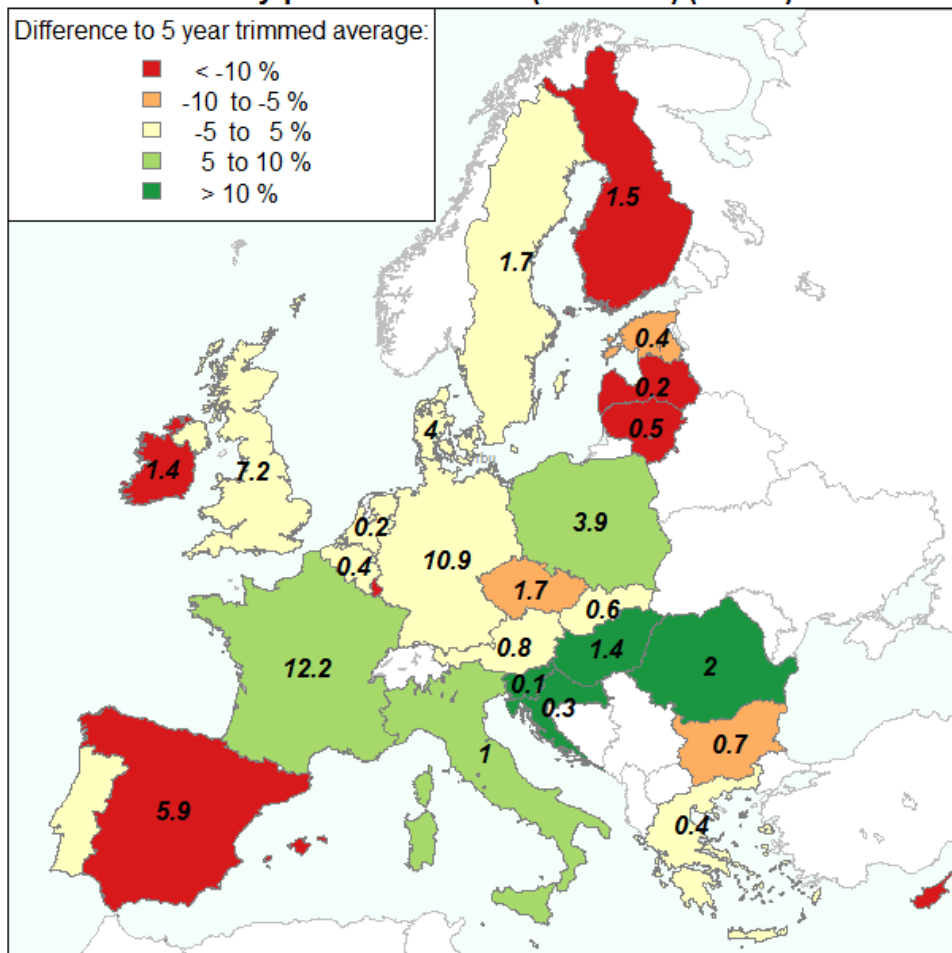


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## Barley production 2017 ( million t ) (f'cast.)

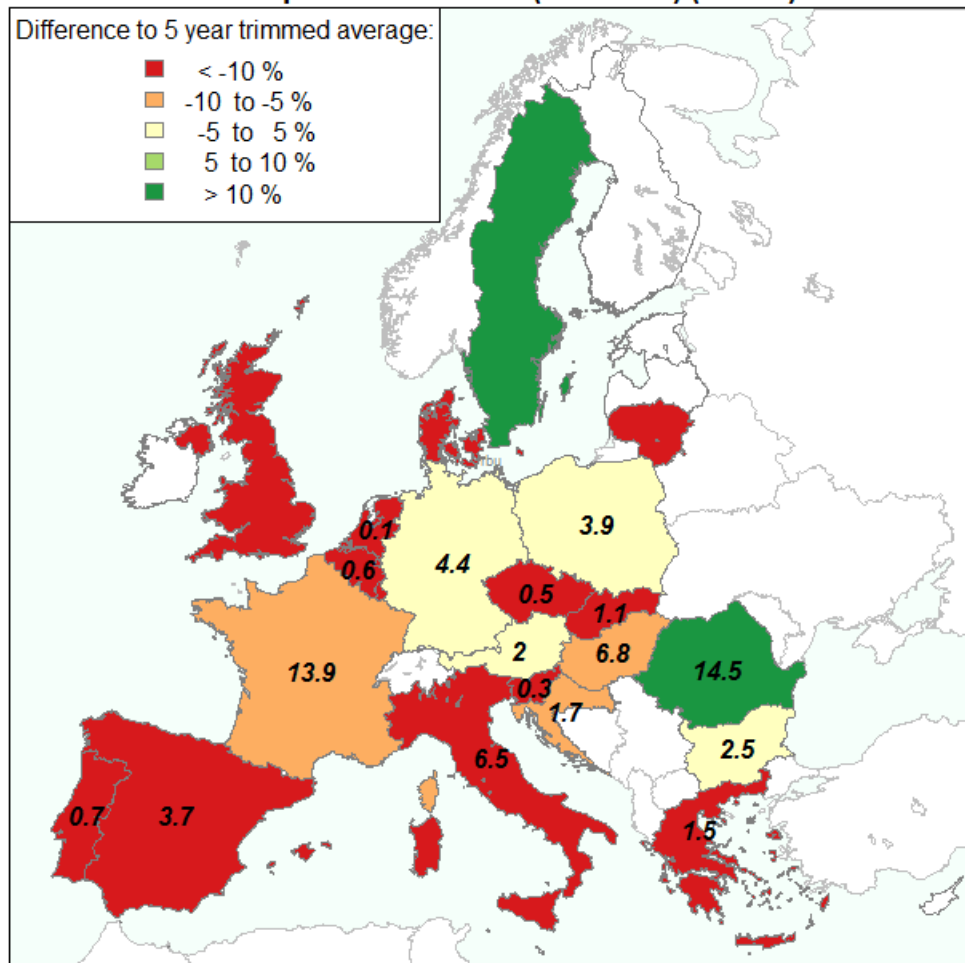
Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %



EU28 production : 58.6 ( million t ) Difference to 5 year trimmed average: -2 %

## Maize production 2017 ( million t ) (f'cast.)



EU28 production : 64.5 ( million t ) Difference to 5 year trimmed average: 2 %

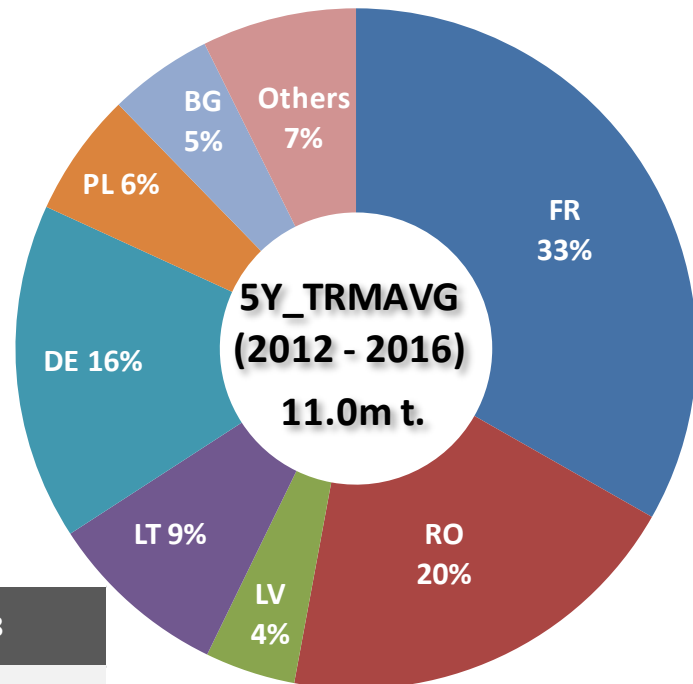
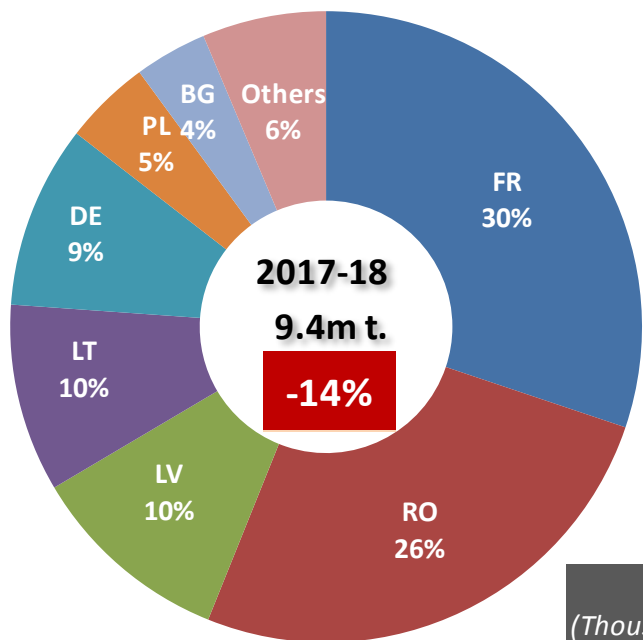
## Quality of Cereals : Harvest 2017

### SOFT WHEAT (\*)

	Average percentage of protein content %	Average percentage of humidity %	Average specific weight kg/hl	Average falling number
<b>BG</b>	12	11,5	77	345
<b>FR</b>	12,3	13,1	73,8	272
<b>SK</b>	13,3	12,4	70,5	362
<b>AT</b>	14,5	---	---	371
<b>HR</b>	11,8	12,2	80,4	356
<b>DE</b>	13,2	13,7	75	285
<b>IT</b>	12,5	12,2	80	---
<b>NL</b>	12,2	15,2	78,5	305
<b>FI</b>	12,5	12,7	80	183
<b>UK</b>	12,8	14,9	75,9	248

(\*) : Members States Communications

## EU MS exporting common wheat (incl. flour and groats) – First 5 months



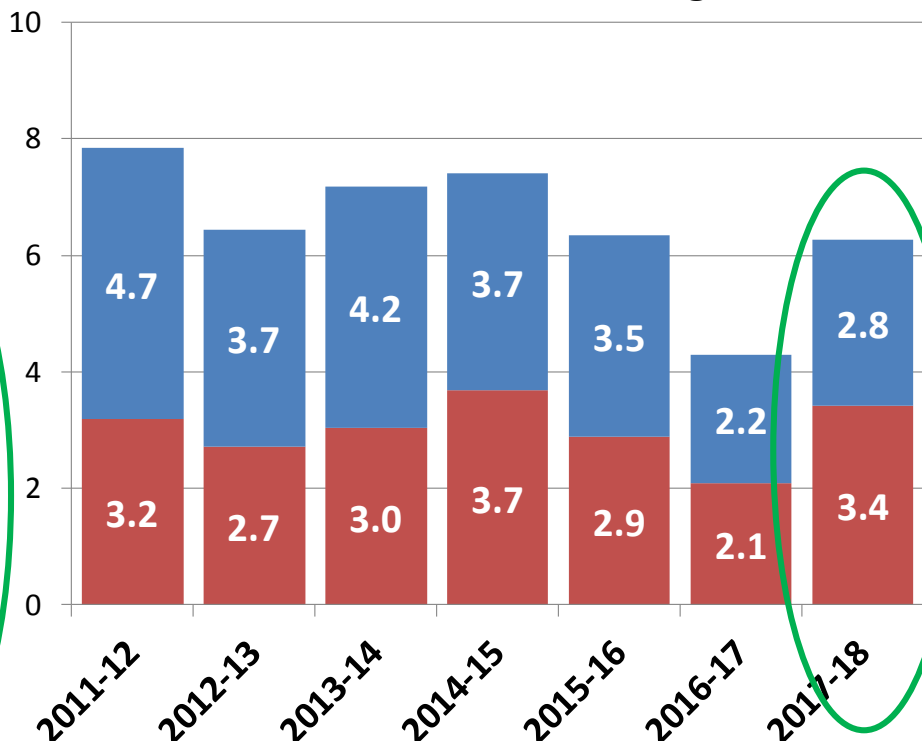
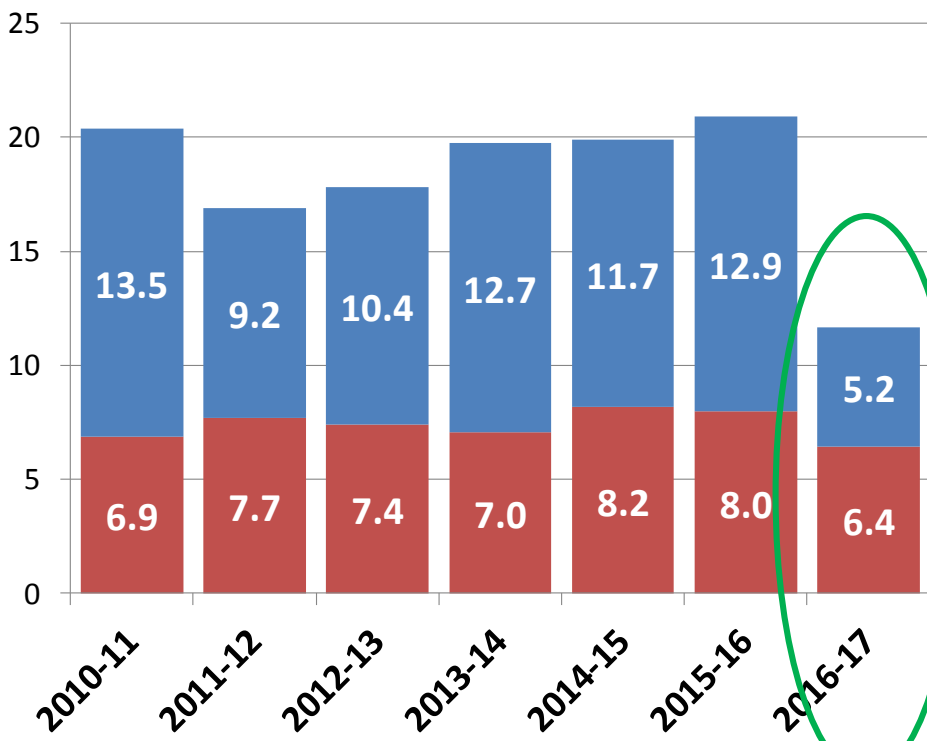
	5Y_TRMAVG (2012 - 2016)	2017-18	
(Thousand tons)			
FR	3 640	2 847	↓ -22%
RO	2 154	2 447	↑ 14%
LV	470	982	↑ 109%
LT	946	909	↓ -4%
DE	1 751	885	↓ -49%
PL	645	419	↓ -35%
BG	541	351	↓ -35%
Others	803	599	↓ -25%

# France – Common wheat exports (million tonnes)

## Intra-Eu vs Extra-Eu

Whole Marketing Year

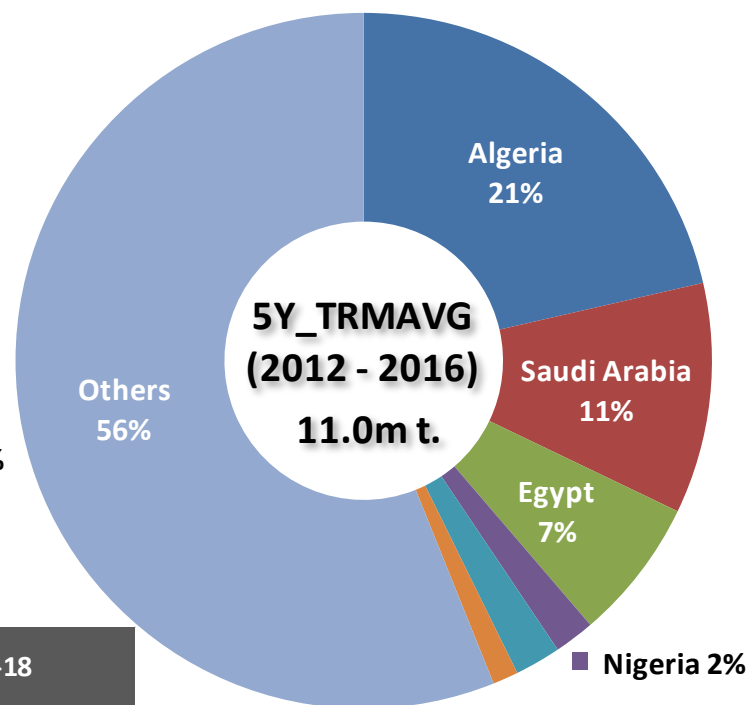
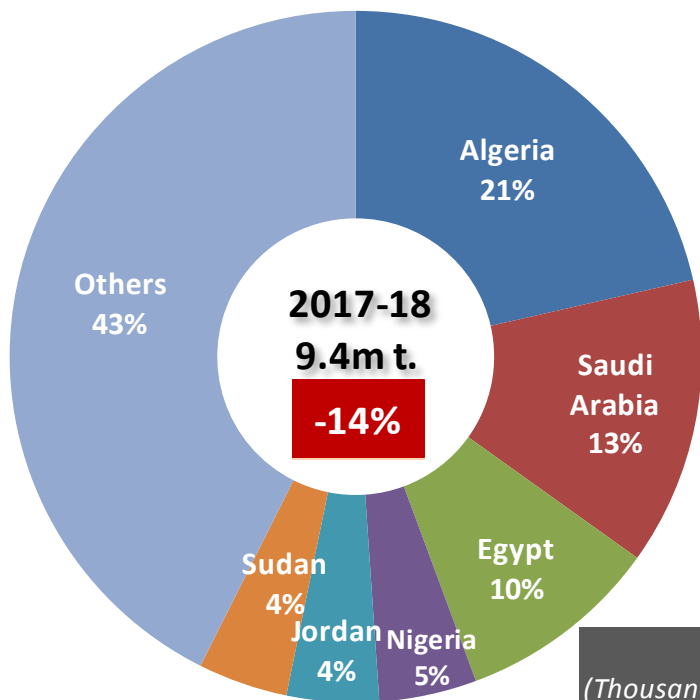
First 5 months of Marketing Year



■ Extra\_EU28

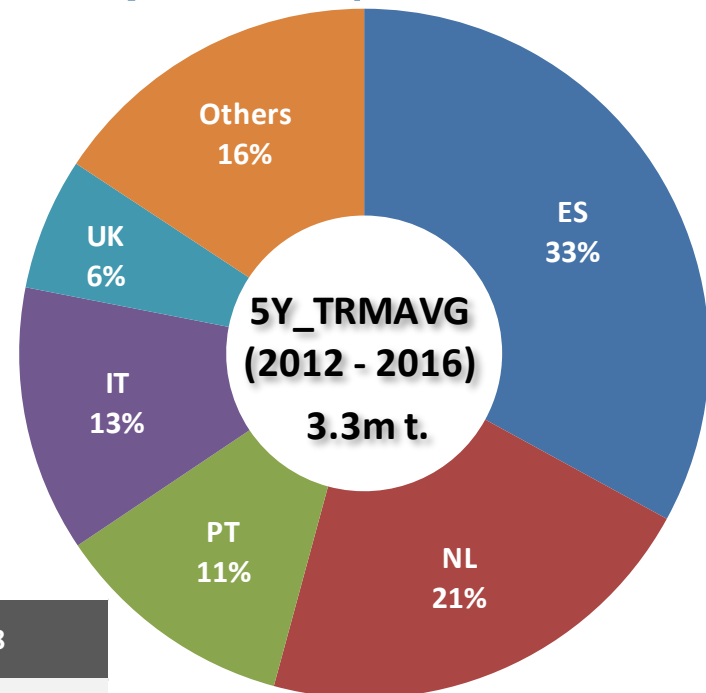
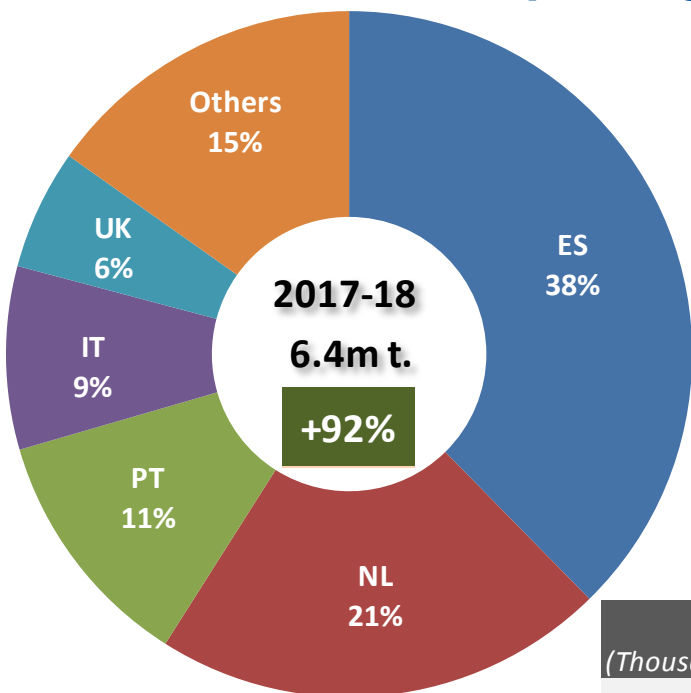
■ Intra\_EU28

## EU common wheat (incl. flour and groats) export destinations



(Thousand tons)	5Y_TRMAVG (2012 - 2016)	2017-18	
Algeria	2 344	2 023	↓ -14%
Saudi Arabia	1 174	1 270	↑ 8%
Egypt	723	894	↑ 24%
Nigeria	205	430	↑ 110%
Jordan	234	406	↑ 73%
Sudan	129	396	↑ 206%
Others	6 142	4 021	↓ -35%

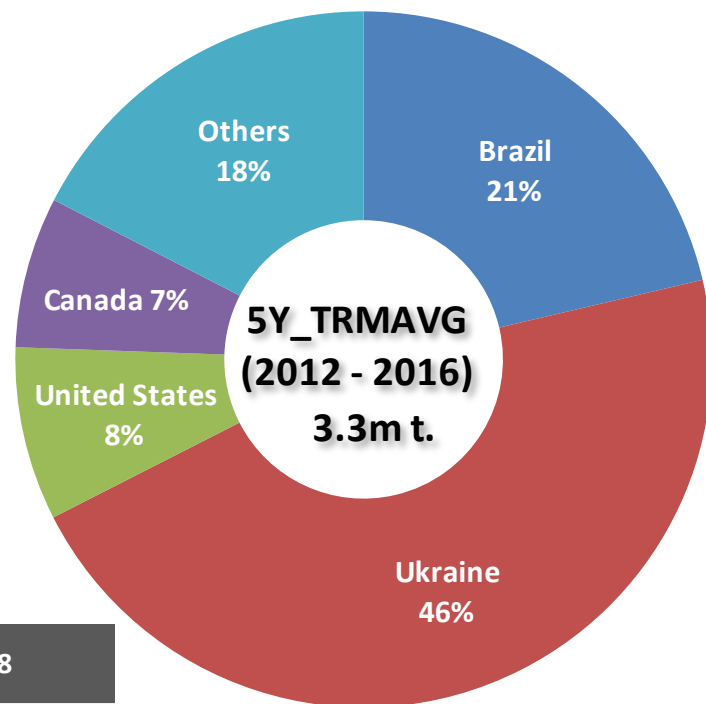
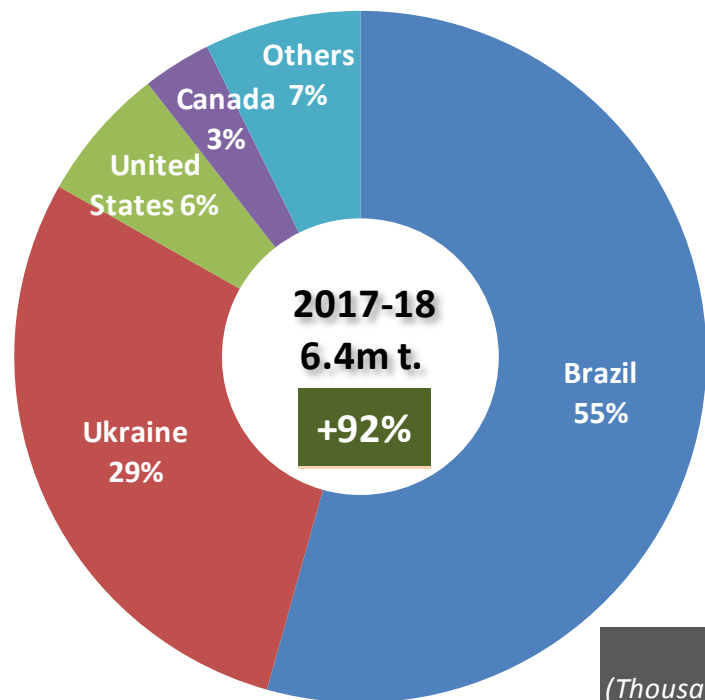
## EU MS importing maize (incl. Processed products)



	5Y_TRMAVG (2012 - 2016)	2017-18	
(Thousand tons)			
ES	1 100	2 406	↑ 119%
NL	709	1 364	↑ 92%
PT	380	736	↑ 94%
IT	417	552	↑ 32%
UK	207	362	↑ 75%
Others	525	971	↑ 85%



## EU maize (incl. Processed products) import origins – First 5 months



	5Y_TRMAVG (2012 - 2016)	2017-18
(Thousand tons)		
Brazil	712	3 474 ↑ 388%
Ukraine	1 541	1 842 ↑ 20%
United States	269	403 ↑ 50%
Canada	234	206 ↓ -12%
Others	582	467 ↓ -20%

## SITUATION AT 19 JANUARY 2018

### IMPORT WHEAT QUOTAS

	Quantity (tonnes)	% use 2018
<b>WTO</b>		
Sub-quota I (USA)	572000	0,0%
Sub quota II (third countries, except USA and Canada) (*)	2378387	4,7%
Sub quota IV (Erga omnes)	122790	0,7%
Quota Canada	100000	0,2%
<b>UKRAINE</b>		
FTA	970000	100,0%
ATM	65000	100,0%
(*) : available in four sub-periods		
Source : DG AGRI		

## SITUATION AT 19 JANUARY 2018

### IMPORT MAIZE QUOTAS

			Quantity (tonnes)	% use 2018
FTA (Ukraine)			500 000	100%
ATM (Ukraine)			625 000	100%
WTO (*)			277 988	50%

(\*) : available in two sub-periods

Source : DG AGRI

## SITUATION AT 19 JANUARY 2018

### IMPORT BARLEY QUOTAS

	Quantity (tonnes)	% use 2018
<b>FTA (Ukraine)</b>	290 000	4,3%
<b>ATM (Ukraine)</b>	325 000	14,7%
<b>WTO (*)</b>	307105	0,7%

(\*) : First Come First Serve

Source : DG AGRI

## 2017/18 Balance Sheet:

	Cereals balance sheet:Marketing year: 2017/2018										Million tonnes EUR 28
Jan-18	Common										
	wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others		
Beginning stocks (01.07.2017)	10,1	5,6	2,9	17,6	0,7	0,1	0,5	1,7	1,5	40,8	
Usable production	141,5	58,6	9,4	64,5	7,2	0,8	8,1	11,3	4,1	305,5	
Import	2,9	0,6	1,5	13,6	0,1	0,2	0,0	0,0	0,2	19,0	
TOTAL AVAILABILITIES	154,5	64,9	13,8	95,8	8,0	1,1	8,6	13,0	5,8	365,3	
USE											
- Human	48,0	0,4	8,0	4,9	3,1	0,2	1,1	0,1	0,0	65,7	
- Seed	4,9	2,2	0,5	0,4	0,4	0,0	0,4	0,5	0,1	9,4	
- Industrial	10,8	9,1	0,1	11,7	1,7	0,0	0,1	0,4	0,1	33,9	
of which alcohol										14,2	
o.w. bioethanol/biofuel	4,7	0,4		6,2	1,0			0,3		12,6	
- Animal feed	51,8	39,2	0,8	57,8	2,1	0,7	6,2	10,9	4,5	174,0	
TOTAL USE	115,3	50,8	9,4	74,7	7,2	0,9	7,9	11,9	4,7	282,9	
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	38,2	13,7	4,3	20,4	0,7	0,2	0,6	1,0	1,1	80,2	
Export	25,5	7,0	1,4	1,5	0,2	0,0	0,2	0,0	0,0	35,8	
Ending stocks (30.06.2018)	12,7	6,7	2,9	18,9	0,5	0,2	0,4	1,0	1,1	44,4	



## Key messages - cereals

- Production forecast above average (around 306 million tonnes, + 3% y/y) based on:
  - Good yields for soft wheat in most of EU
  - Record harvest in RO incl. for maize (1<sup>st</sup> producer in EU)

Also to be noted:

- Decrease of total EU cereal area (55.5 million ha, -2% y/y)
- Decrease of total EU exports
- Ending stocks expected to increase thanks to good production



# Contents

1. 2017/18 MY Cereals

**2. 2017/18 MY Oilseeds and Proteins**

# EU Oilseeds

## EU OILSEEDS AREA

Million ha	AVG 5 yrs trimmed	2016/17	2017/18 December 2017	2017/18 January 2018	%change 2016/17	%change 5yrs trimmed
Rapeseed	6.6	6.5	6.71	6.71	2.7	2.1
Sunflower	4.3	4.1	4.39	4.39	6.1	3.1
Soja	0.6	0.8	0.96	0.96	15.7	54.8
<b>TOTAL</b>	<b>11.5</b>	<b>11.5</b>	<b>12.06</b>	<b>12.06</b>	<b>4.9</b>	<b>5.4</b>

Sources : DG AGRI G.4

## EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 December 2017	2017/18 January 2018	%change 2016/17	%change 5yrs trimmed
Rapeseed	21.0	20.1	21.8	21.8	8.5	4.1
Sunflower	8.6	8.7	10.3	10.3	17.6	19.0
Soja	1.8	2.5	2.8	2.8	12.9	55.0
<b>TOTAL</b>	<b>31.4</b>	<b>31.3</b>	<b>34.9</b>	<b>34.9</b>	<b>11.4</b>	<b>11.1</b>

Sources : DG AGRI G.4

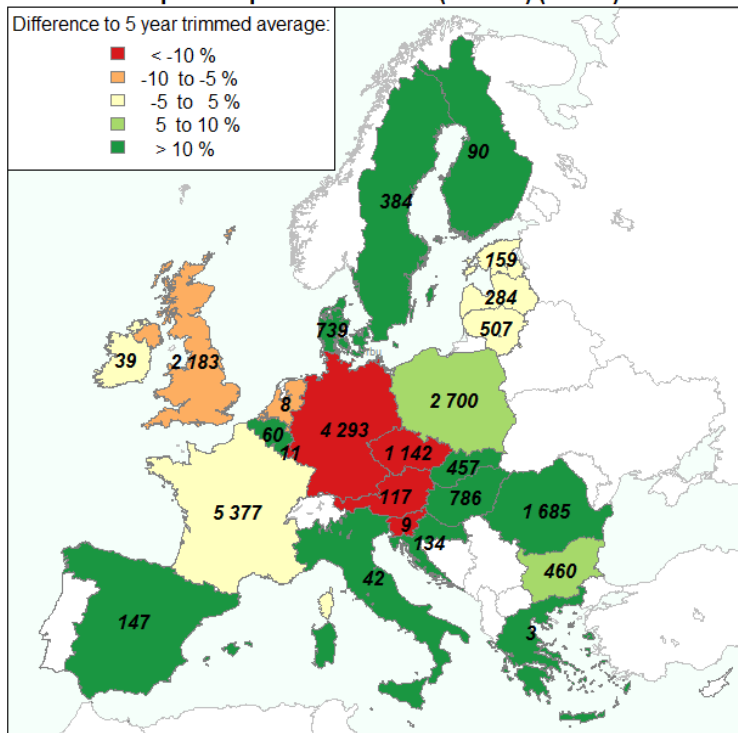




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# EU Rapeseed

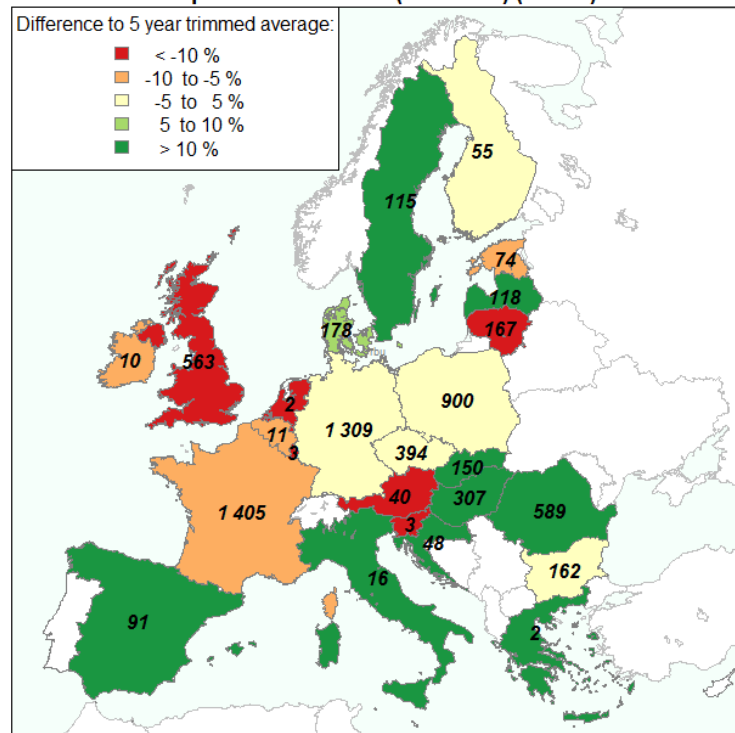
**Rapeseed production 2017 ( 1000 t ) (f'cast.)**



Calculations and cartography: European Commission DG AGRI G4 2018-01-23 © EuroGeographics for the administrative boundaries

EU28 production : 21 817 ( 1000 t ) Difference to 5 year trimmed average: 4 %

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



Calculations and cartography: European Commission DG AGRI G4 2018-01-23 © EuroGeographics for the administrative boundaries

EU28 area : 6 712 ( 1000 ha ) Difference to 5 year trimmed average: 2 %

# EU Rapeseed

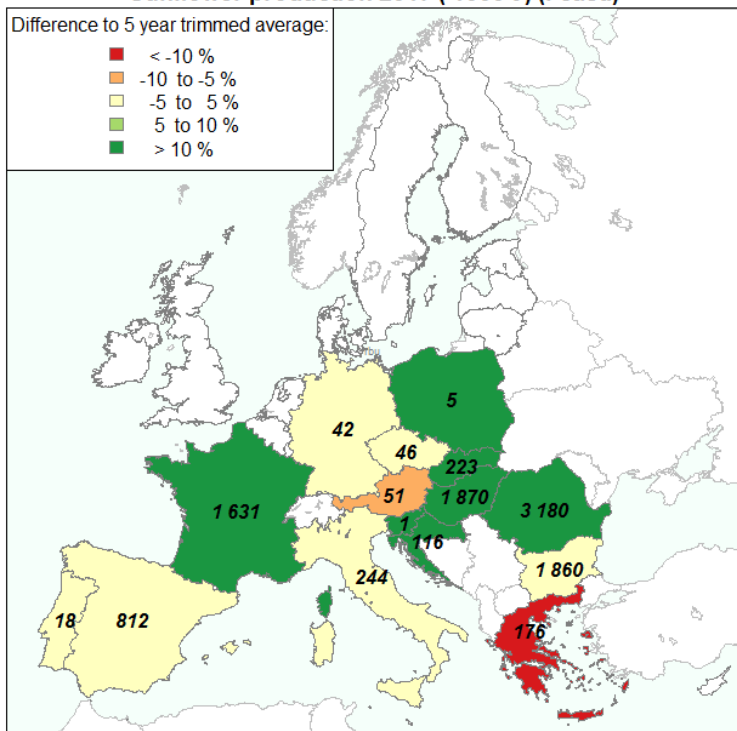
Rapeseed			↓	↓		
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 December 2017	2017/18 January 2018	%change 2016/17	%change 5yrs trimmed
TOTAL EU	20.96	20.10	21.82	21.82	8.5	4.1
France	5.18	4.74	5.38	5.38	13.5	3.9
Germany	5.21	4.58	4.29	4.29	-6.3	-17.6
Poland	2.53	2.22	2.70	2.70	21.7	6.6
UK	2.38	1.78	2.18	2.18	23.0	-8.1
Czech Republic	1.35	1.36	1.14	1.14	-16.0	-15.6
Romania	0.88	1.29	1.68	1.68	30.3	91.1
Others	3.44	4.14	4.44	4.44	7.2	29.1
Sources : DG AGRI G.4						



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# EU Sunflower

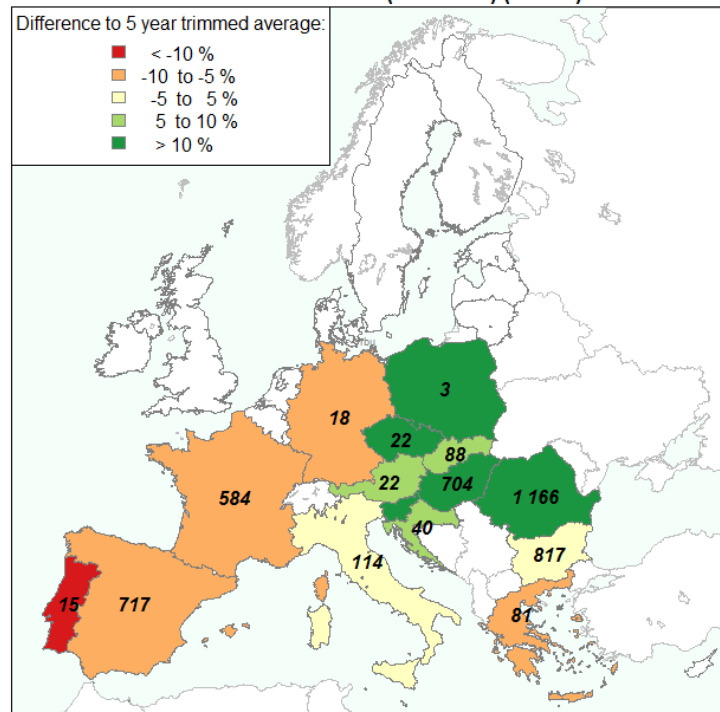
**Sunflower production 2017 ( 1000 t ) (f'cast.)**



Calculations and cartography: European Commission DG AGRI G4 2018.01.23 © EuroGeographics for the administrative boundaries

EU28 production : 10 274 ( 1000 t ) Difference to 5 year trimmed average: 19 %

**Sunflower area 2017 ( 1000 ha ) (f'cast.)**



Calculations and cartography: European Commission DG AGRI G4 2018.01.23 © EuroGeographics for the administrative boundaries

EU28 area : 4 391 ( 1000 ha ) Difference to 5 year trimmed average: 3 %

# EU Sunflower

Sunflower						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 December 2017	2017/18 January 2018	%change 2016/17	%change 5yrs trimmed
TOTAL EU	8.63	8.74	10.27	10.27	17.6	19.0
Romania	1.99	2.03	3.18	3.18	56.5	60.0
Bulgaria	1.84	1.84	1.86	1.86	1.2	1.2
Spain	0.83	0.77	0.81	0.81	5.1	-2.4
France	1.44	1.18	1.63	1.63	37.9	13.3
Hungary	1.55	1.88	1.87	1.87	-0.3	20.9
Others	0.99	1.04	0.92	0.92	-11.2	-6.8
Sources : DG AGRI G.4						



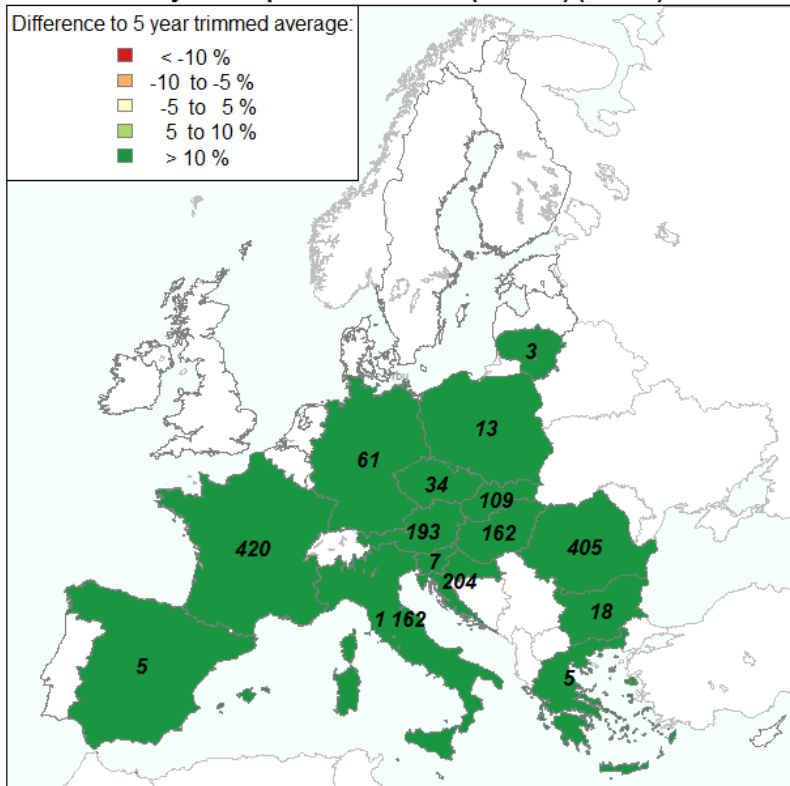
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# EU Soybeans

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

Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %



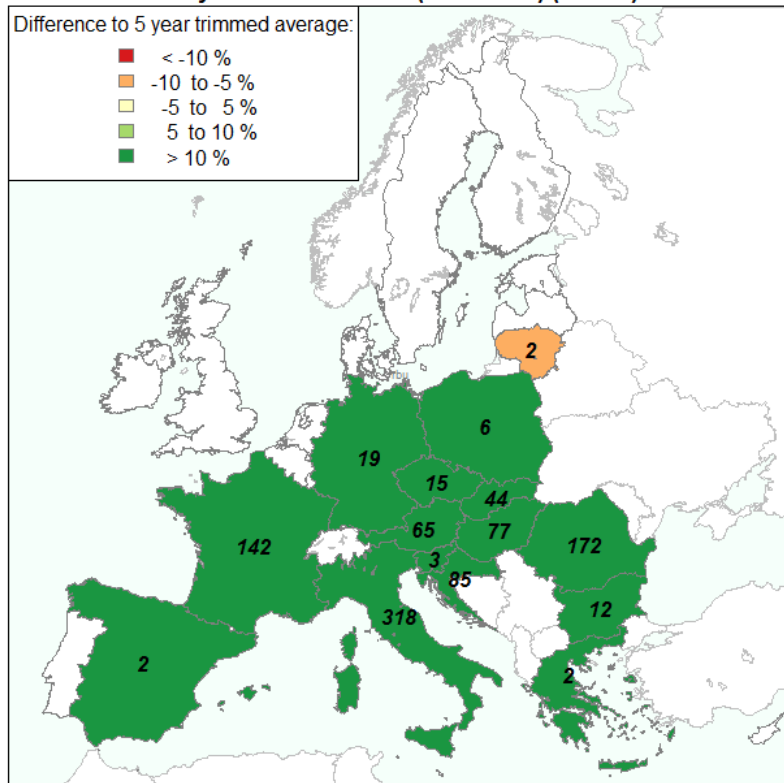
EU28 production : 2 801 ( 1000 t ) Difference to 5 year trimmed average: 55 %

Calculations and cartography: European Commission DG AGRI 04 2018-01-23 © EuroGeographics for the administrative boundaries

**Soybeans area 2017 ( 1 000 ha ) (f'cast.)**

Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %



EU28 area : 962 ( 1000 ha ) Difference to 5 year trimmed average: 55 %

Calculations and cartography: European Commission DG AGRI 04 2018-01-23 © EuroGeographics for the administrative boundaries

# EU Soybeans

Soya						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 December 2017	2017/18 January 2018	%change 2016/17	%change 5yrs trimmed
TOTAL EU	1.81	2.48	2.80	2.80	12.9	55.0
Italy	0.88	1.08	1.16	1.16	7.5	32.1
Romania	0.20	0.26	0.41	0.41	53.9	97.8
France	0.22	0.34	0.42	0.42	23.0	88.7
Croatia	0.15	0.24	0.20	0.20	-16.4	39.4
Hungary	0.11	0.18	0.16	0.16	-12.3	42.9
Austria	0.12	0.15	0.19	0.19	26.7	61.9
Others	0.12	0.21	0.25	0.25	19.7	109.6
Sources : DG AGRI G.4						

# Key messages - oilseeds

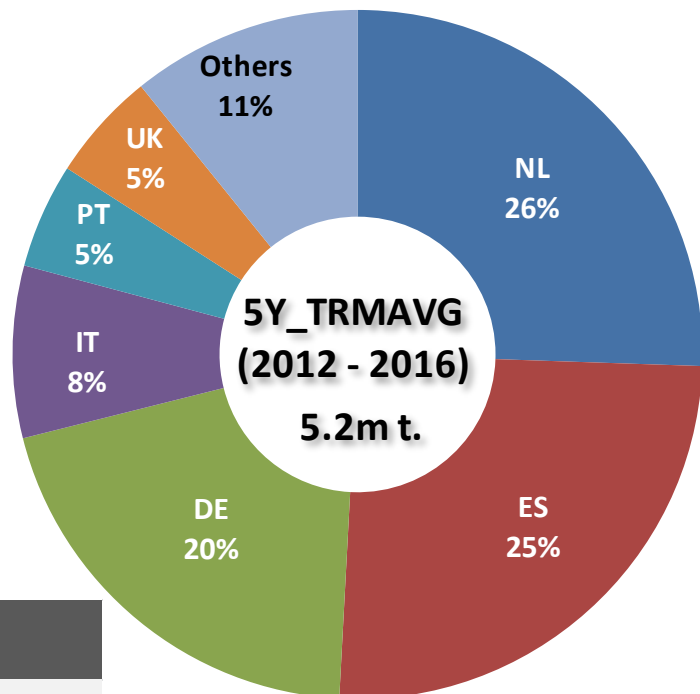
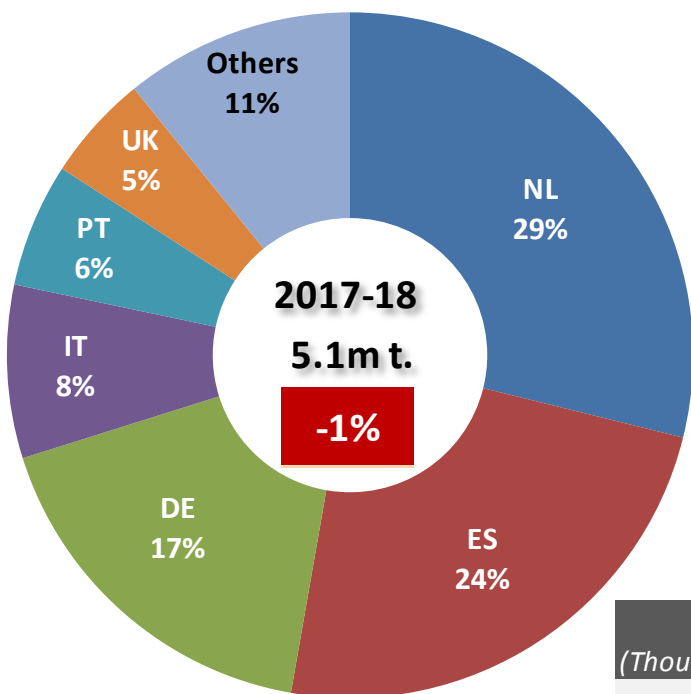
2017/18 production of oilseeds at high level

- Total EU production at 34.9 m t (increase of production for the three crops)
- +11% y/y (better yields and higher area)

## Crops

- Rapeseed at 21.8 m t (+8.5% y/y) – third highest level
- Sunflower at 10.3 m t (+18 % y/y) – record level
- Soyabeans at 2.8 m t (+13 % y/y) – record level

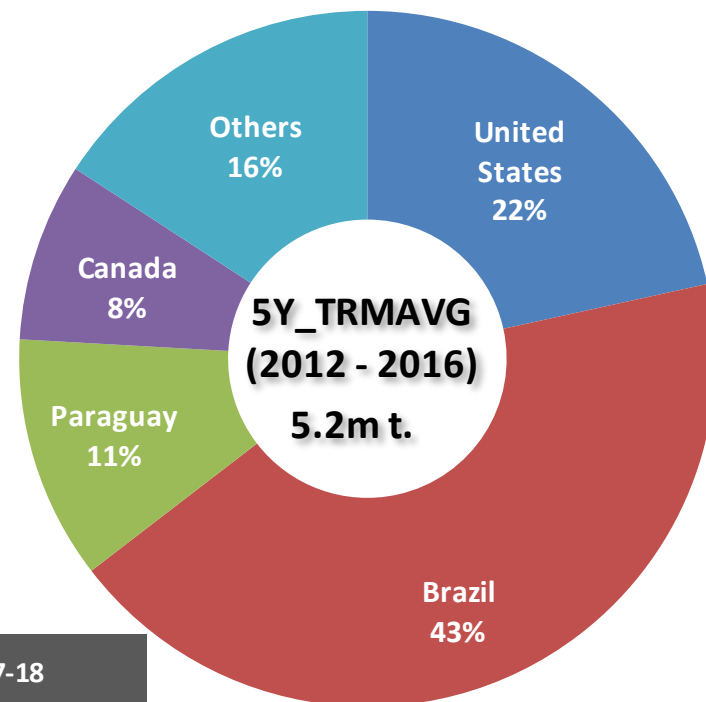
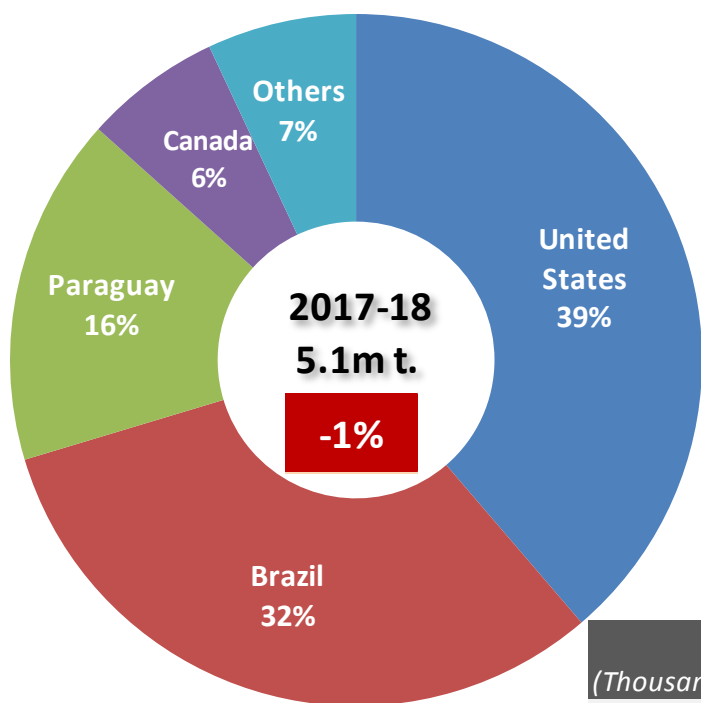
## EU MS importing soybeans



(Thousand tons)	5Y_TRMAVG (2012 - 2016)	2017-18	
NL	1 318	1 481	↑ 12%
ES	1 306	1 226	↓ -6%
DE	1 045	892	↓ -15%
IT	417	419	→ 1%
PT	254	300	↑ 18%
UK	264	257	↓ -3%
Others	557	556	→ 0%

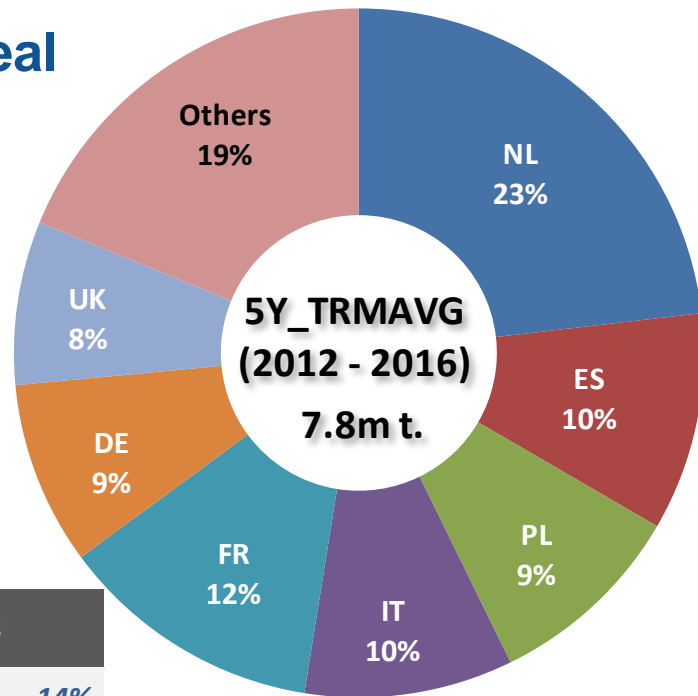
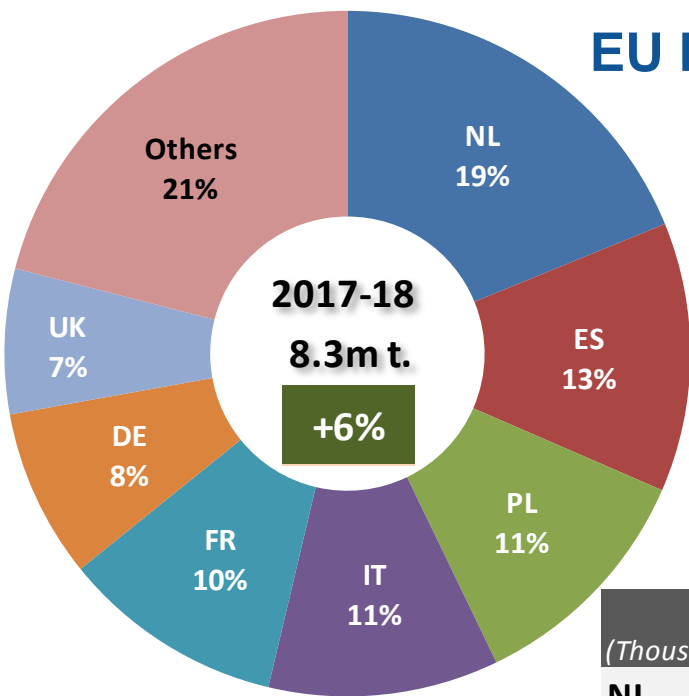


## EU soybeans import origins



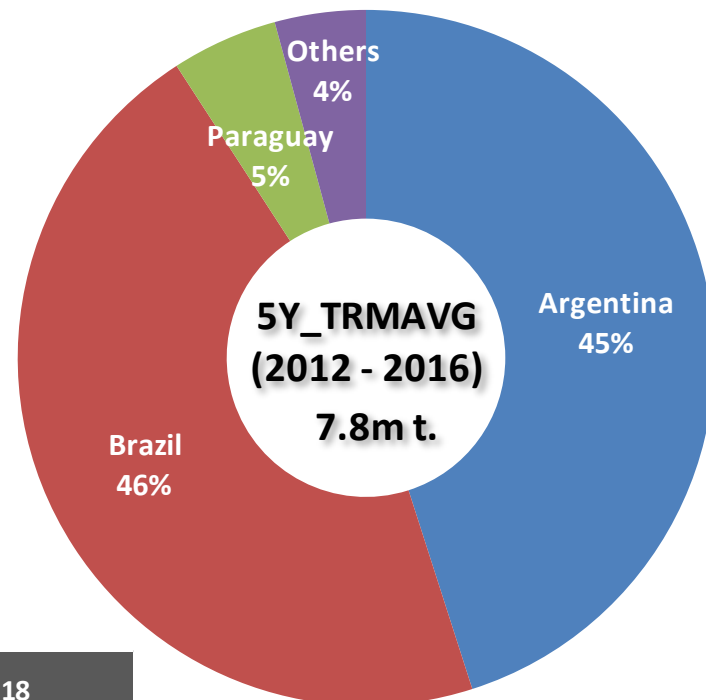
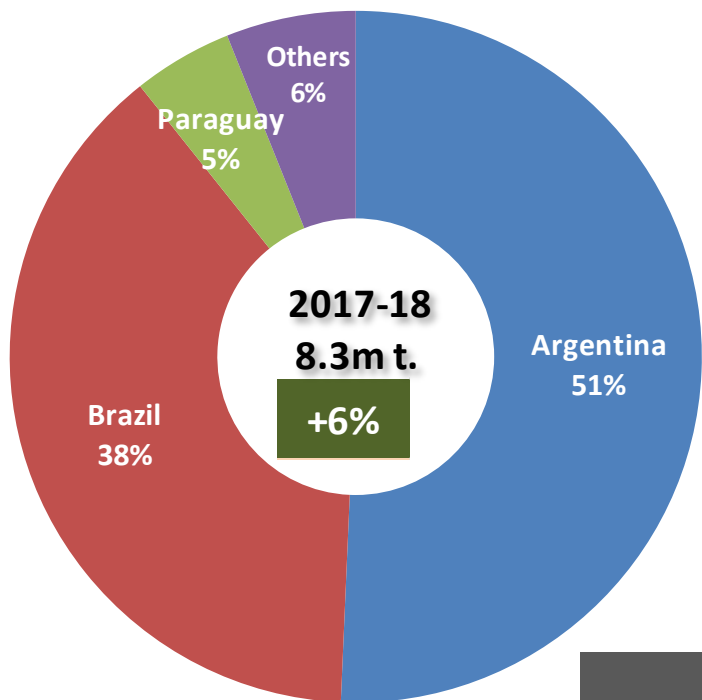
(Thousand tons)	5Y_TRMAVG (2012 - 2016)	2017-18	
United States	1 112	1 986	↑ 79%
Brazil	2 220	1 623	↓ -27%
Paraguay	585	835	↑ 43%
Canada	428	328	↓ -23%
Others	816	358	↓ -56%

## EU MS importing soymeal



(Thousand tons)	5Y_TRMAVG (2012 - 2016)	2017-18	
NL	1 808	1 563	↓ -14%
ES	799	1 054	↑ 32%
PL	731	940	↑ 29%
IT	763	901	↑ 18%
FR	966	870	↓ -10%
DE	672	661	↓ -2%
UK	599	568	↓ -5%
Others	1 469	1 743	↑ 19%

## EU soymeal import origins



(Thousand tons)	5Y_TRMAVG (2012 - 2016)	2017-18	
Argentina	3 518	4 208	↑ 20%
Brazil	3 575	3 205	↓ -10%
Paraguay	385	386	→ 0%
Others	330	503	↑ 53%

# EU Protein crops

## EU PROTEIN CROPS AREA

Million ha	AVG 5 yrs trimmed	2016/17	2017/18 December 2017	2017/18 January 2018	%change 2016/17	%change 5yrs trimmed
Field peas	0.6	0.9	1.01	1.01	10.3	68.0
Broad beans	0.5	0.7	0.65	0.65	-1.2	40.9
Sweet lupins	0.1	0.2	0.18	0.18	-1.3	34.4
<b>TOTAL</b>	<b>1.2</b>	<b>1.7</b>	<b>1.83</b>	<b>1.83</b>	<b>4.8</b>	<b>53.8</b>

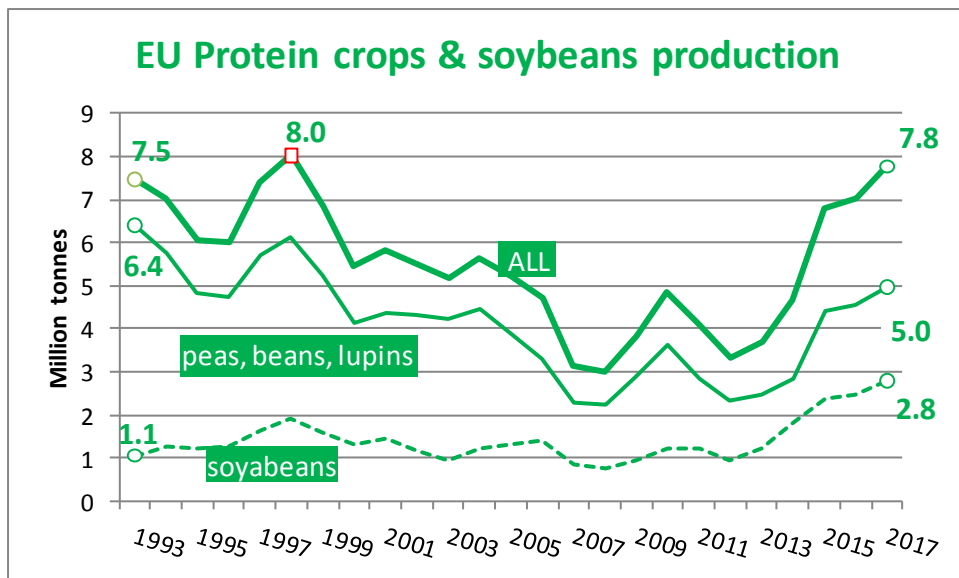
Sources : DG AGRI G.4

## EU PROTEIN CROPS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 December 2017	2017/18 January 2018	%change 2016/17	%change 5yrs trimmed
Field peas	1.6	2.3	2.7	2.7	16.4	70.2
Broad beans	1.4	1.9	2.0	2.0	3.2	41.9
Sweet lupins	0.2	0.3	0.3	0.3	-2.3	31.3
<b>TOTAL</b>	<b>3.2</b>	<b>4.5</b>	<b>5.0</b>	<b>5.0</b>	<b>9.6</b>	<b>55.2</b>

Sources : DG AGRI G.4

## Key messages – protein crops



Since 2013

Protein crops : + 114 %

Soybeans : + 121 %

2017 harvest close to record



**Thank you for your attention!**

**More COP Market Information available on  
the Crops Market Observatory at:**

**<https://ec.europa.eu/agriculture/market-observatory/crops>**