



# Animal Feed Market Situation

**Civil Dialogue Group on Animal Products**

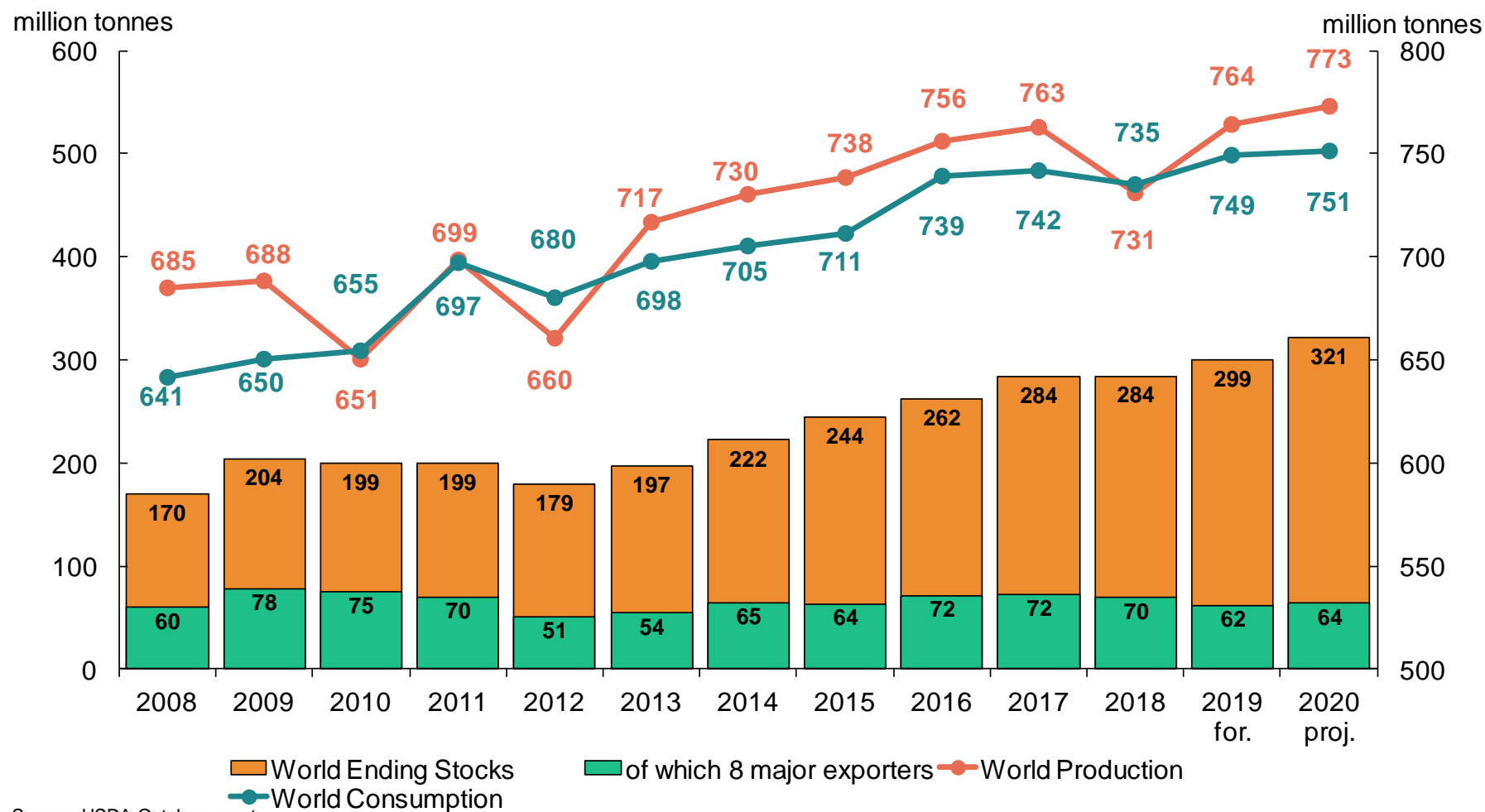
***Poultry Meat Sector***

**DG AGRI G.4.**

*3 November 2020*

# World Cereals Forecasts and Prices

# World wheat: USDA



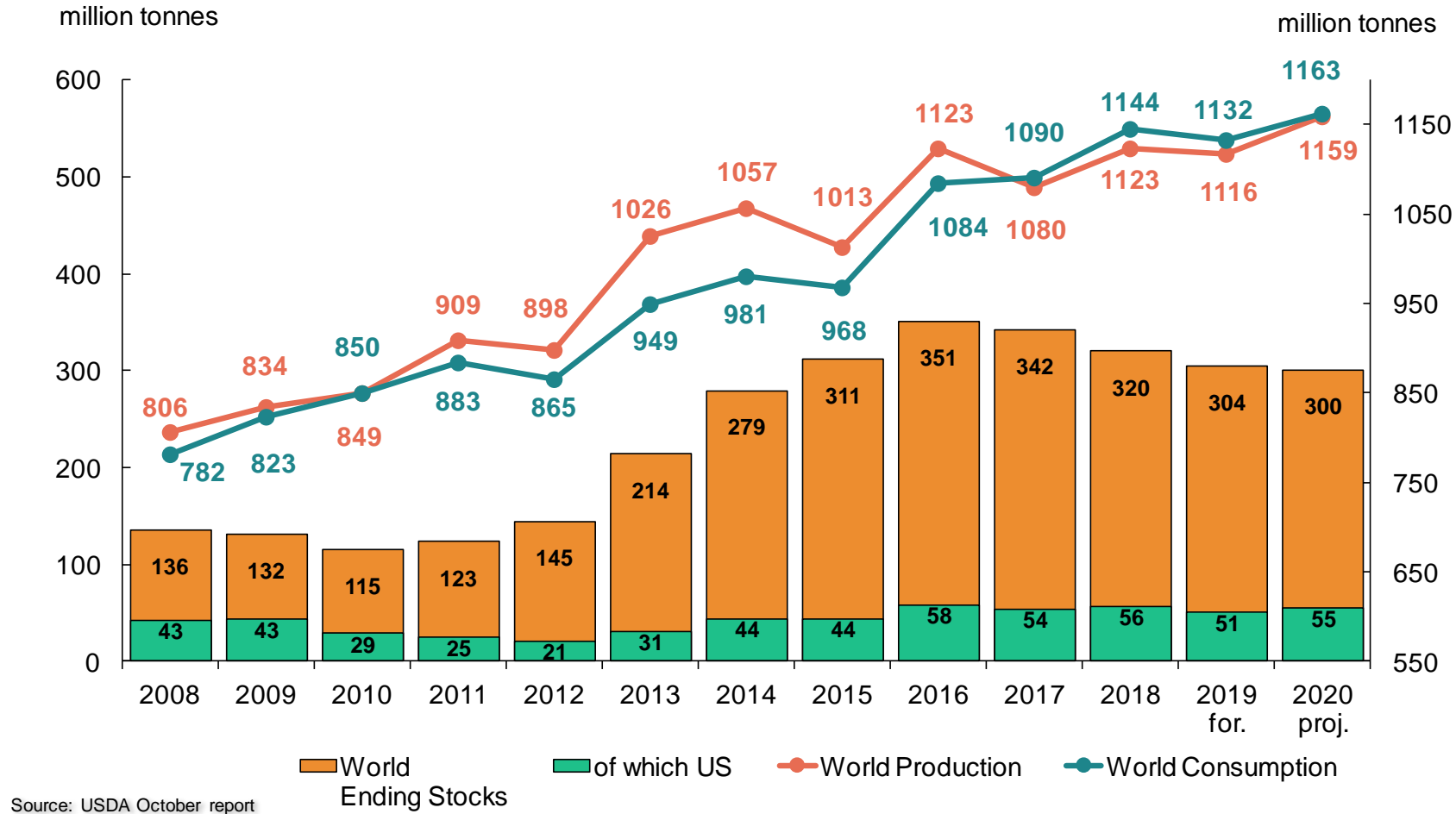
# USDA 2020/21 Supply and Demand Estimates

(WASDE – 605 of 9 October 2020)

Wheat production forecasts in selected countries (all wheat; million tonnes)

	2020/21	Share of total	2019/20	m/m change (m t)	y/y change (%)
EU-27 + UK	136.8	17.7%	154.9	+0.6	-11.7%
USA	49.7	6.4%	52.6	-0.3	-5.5%
Canada	35.0	4.5%	32.4	-1.0	+8.2%
Russia	83.0	10.7%	73.6	+5.0	+12.8%
Ukraine	25.5	3.3%	29.2	-1.5	-12.6%
Australia	28.5	3.7%	15.2	-	+87.5%
Argentina	19.0	2.5%	19.8	-0.5	-3.8%
China	136.0	17.6%	133.6	-	+1.8%
India	107.6	13.9%	103.6	-	+3.9%
World	773.1	100.0%	764.5	+2.6	+1.1%

# World maize: USDA



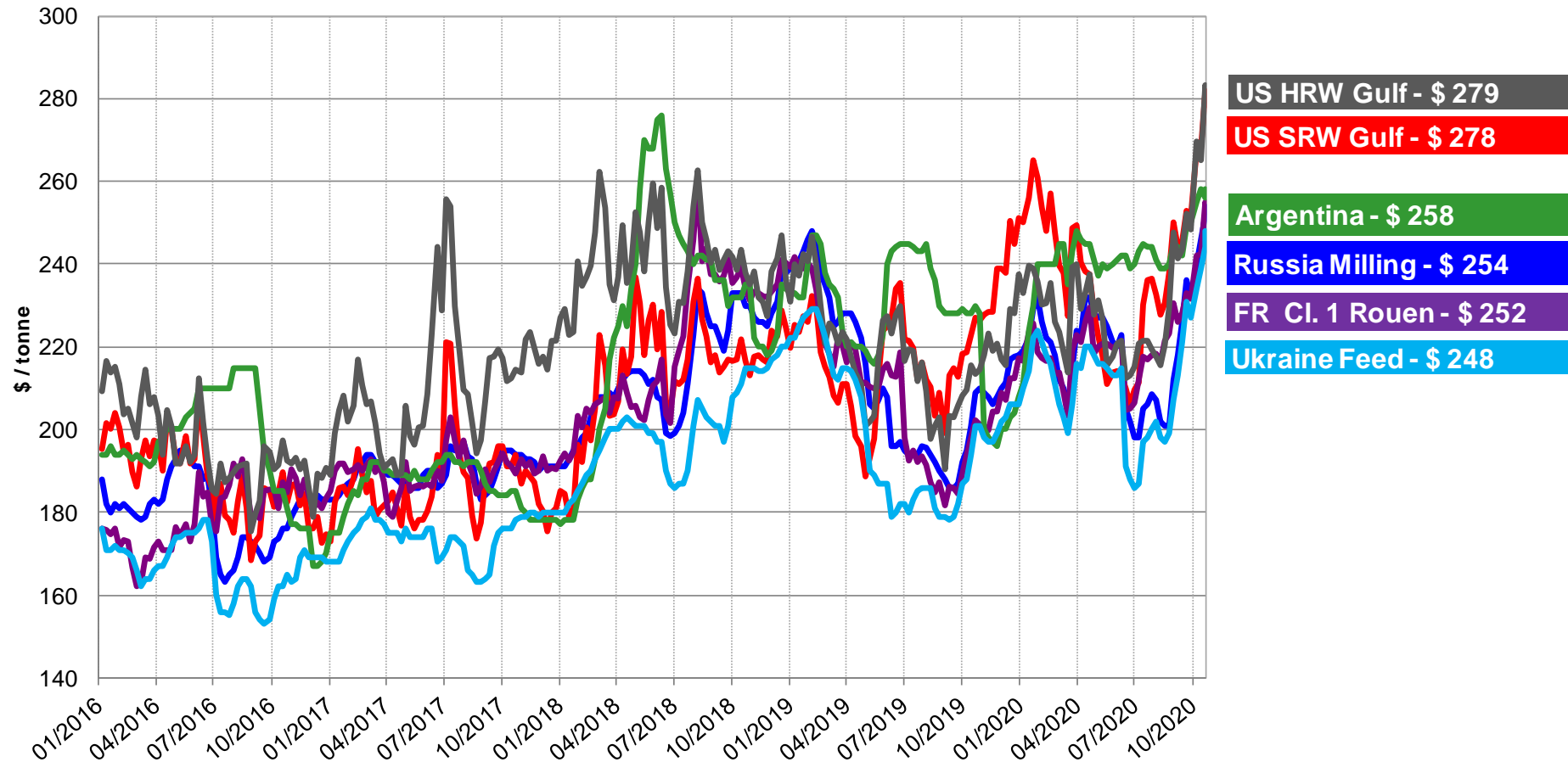
# USDA 2020/21 Supply and Demand Estimates

(WASDE – 605 of 9 October 2020)

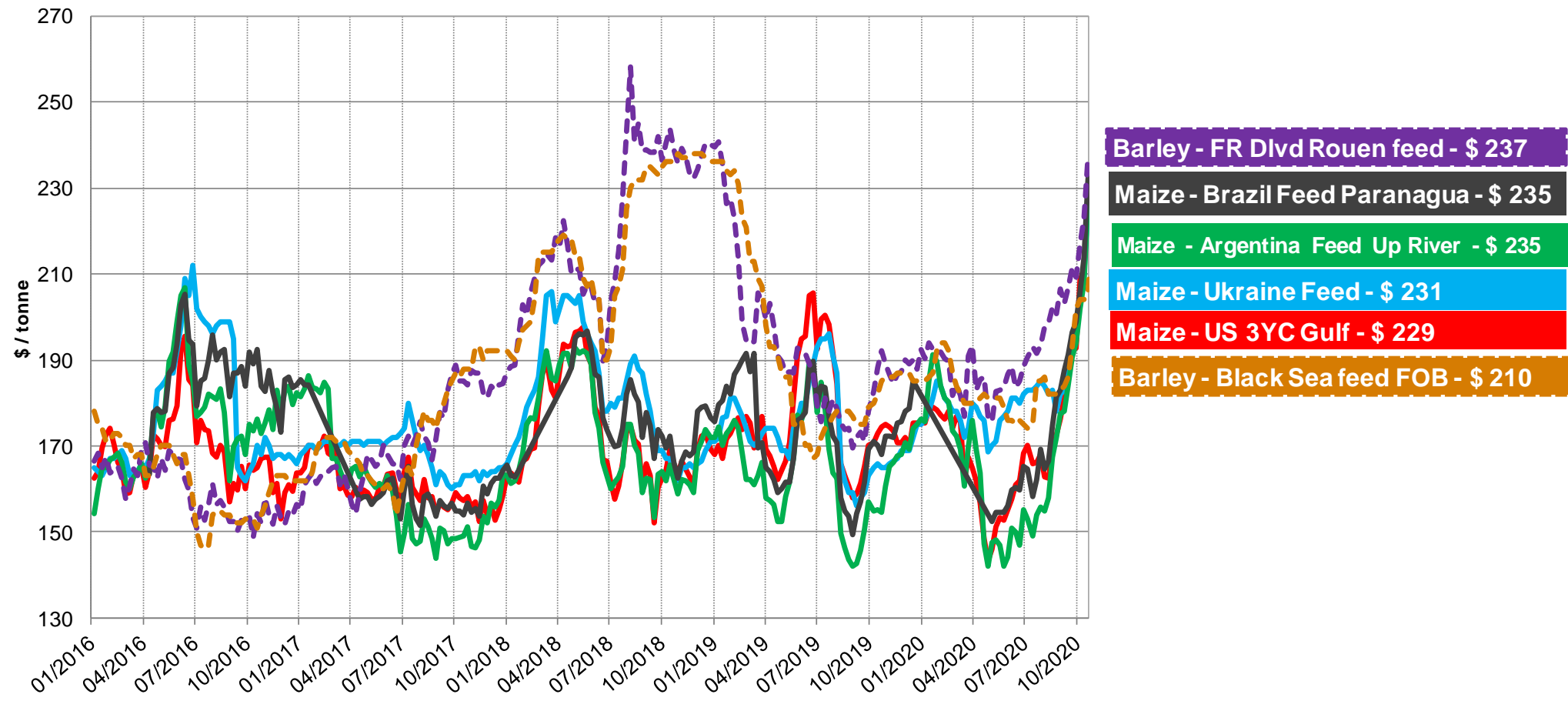
## Maize production forecasts in selected countries (million tonnes)

	2020/21	Share of total	2019/20	m/m change (m t)	y/y change (%)
EU-27 + UK	66.1	5.7%	66.7	-0.2	-0.9%
USA	374.0	32.3%	346.0	-4.5	+8.1%
Ukraine	36.5	3.1%	35.9	-2.0	+1.7%
Russia	15.0	1.3%	14.3	-	+5.1%
Brazil	110.0	9.5%	102.0	-	+7.8%
Argentina	50.0	4.3%	51.0 (+1.0m m/m)	-	-2.0%
China	260.0	22.4%	260.8	-	-0.3%
South Africa	14.0	1.2%	16.3	-	-13.9%
World	1,158.8	100%	1,116.3 (+3.5m)	-3.6	+3.8%

# World common wheat prices (\$/t)

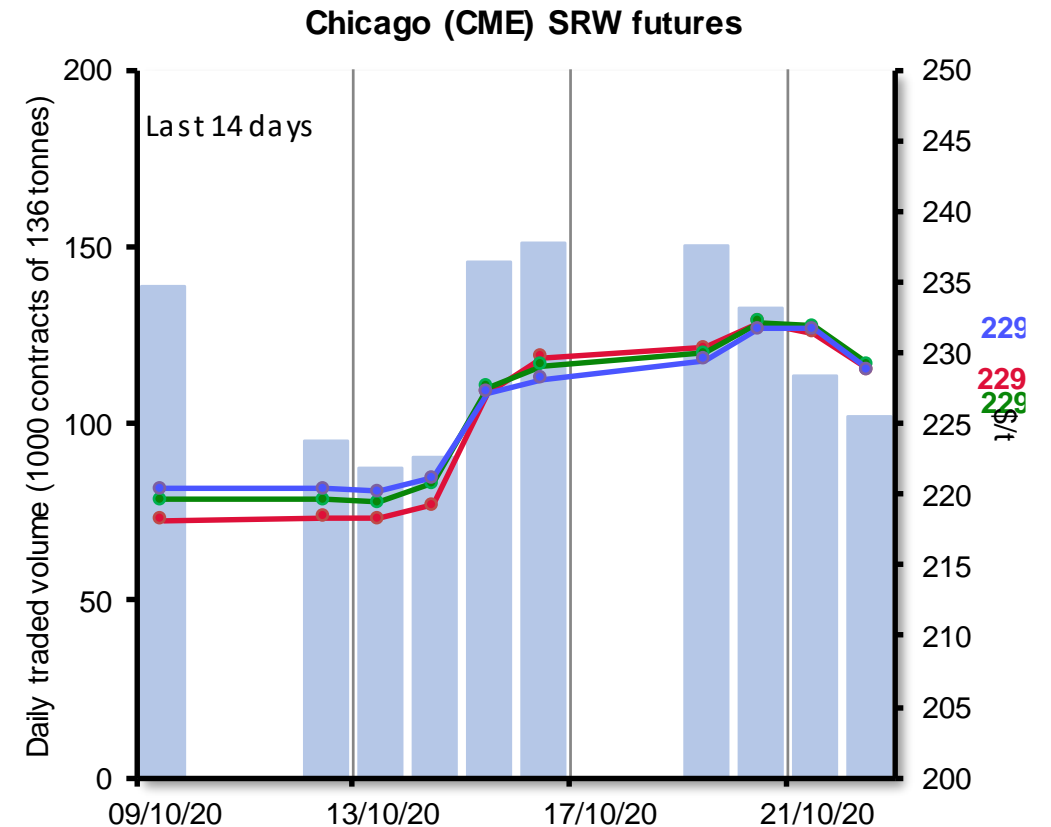
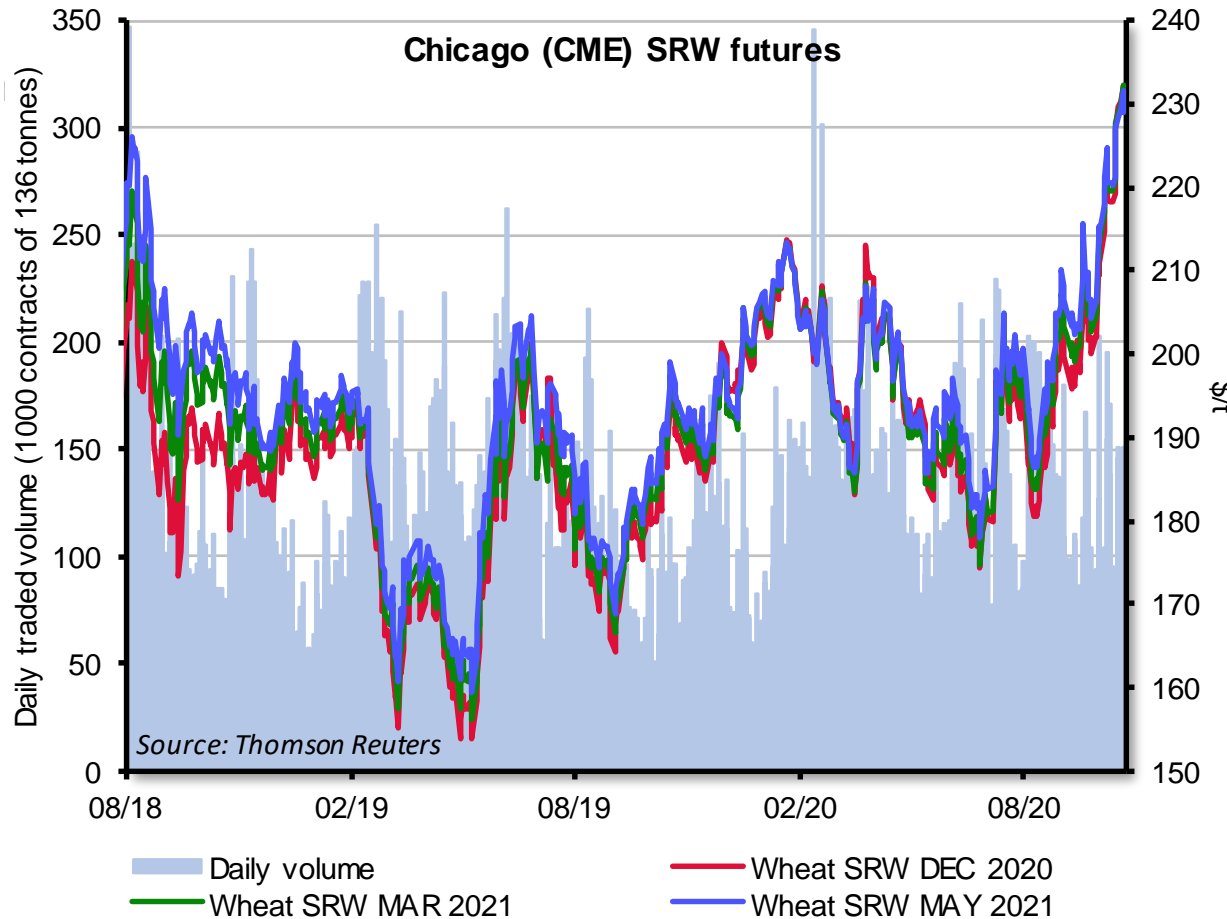


# World maize and barley prices (\$/t)

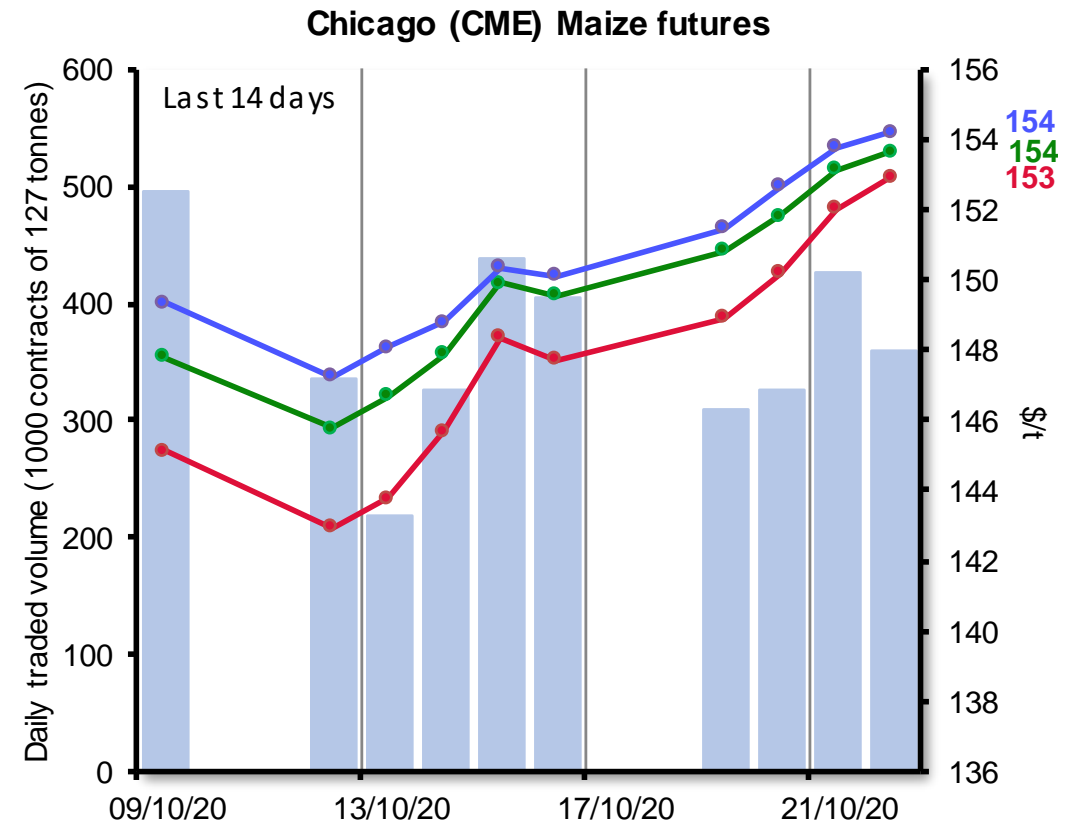
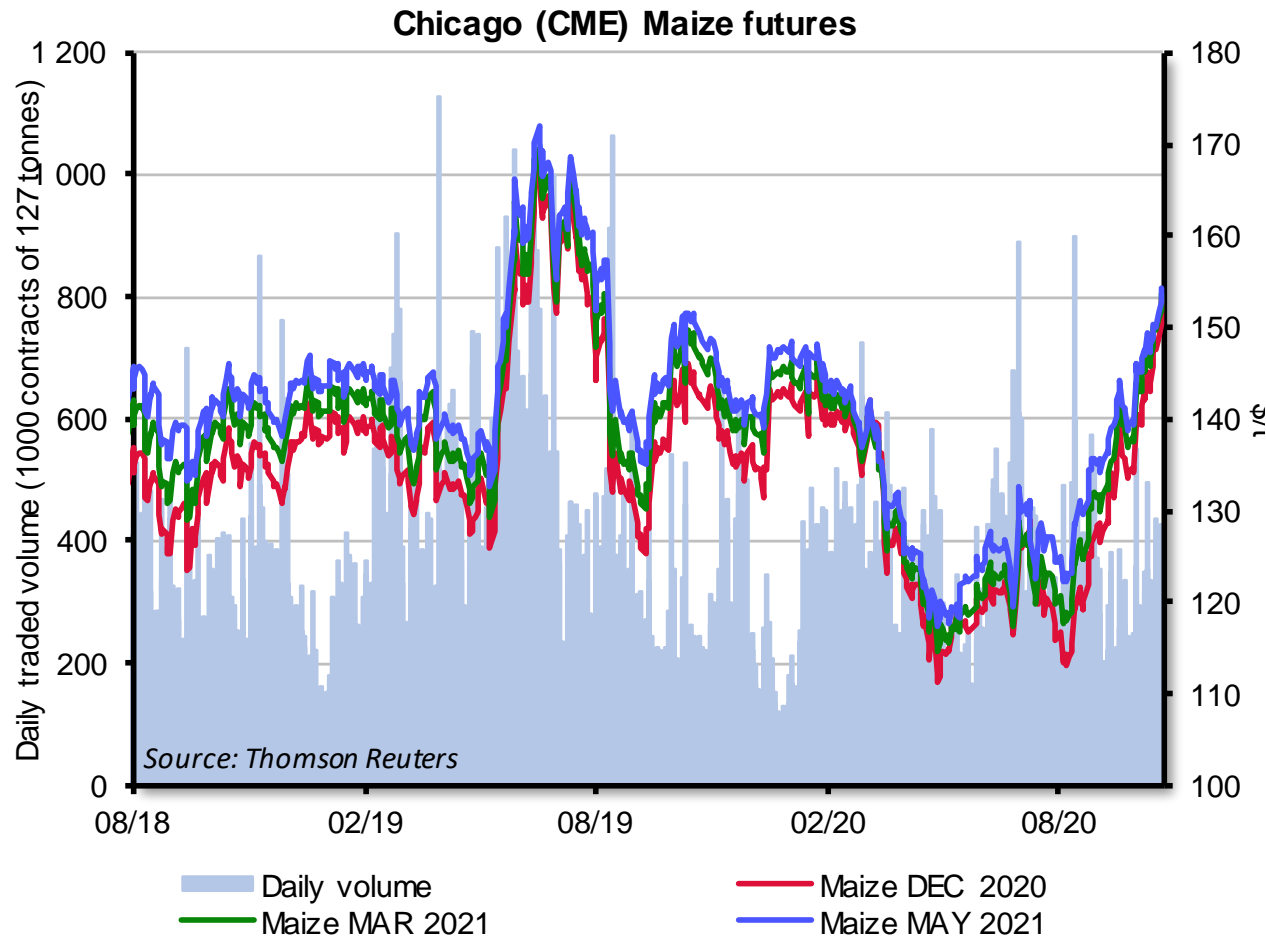




# US CME SRW wheat futures



# CME maize futures



# EU Cereals Forecasts, Balance Sheet and Prices

Marketing Year 2020/21

# EU : Production Forecasts

## EVOLUTION OF THE EU 27 CEREALS USABLE PRODUCTION

(million tonnes)

	2018/19	2019/20	2020/21		
			Sept Forecast	Oct Forecast	vs. 2019/2020 (%)
Soft wheat	114,8	131,2	115,5	115,9	-11,7
Durum wheat	8,7	7,4	7,3	7,2	-2,7
Barley	49,5	55,0	55,0	54,3	-1,3
Maize	69,0	70,1	63,1	60,2	-14,1
Rye	6,0	8,4	8,7	8,9	6,0
Oats	6,8	7,1	8,1	8,1	14,1
<b>Total</b>	<b>268,9</b>	<b>294,5</b>	<b>274,3</b>	<b>271,5</b>	<b>-7,8</b>

Source: DG AGRI -G4

# EU Cereals Balance Sheet

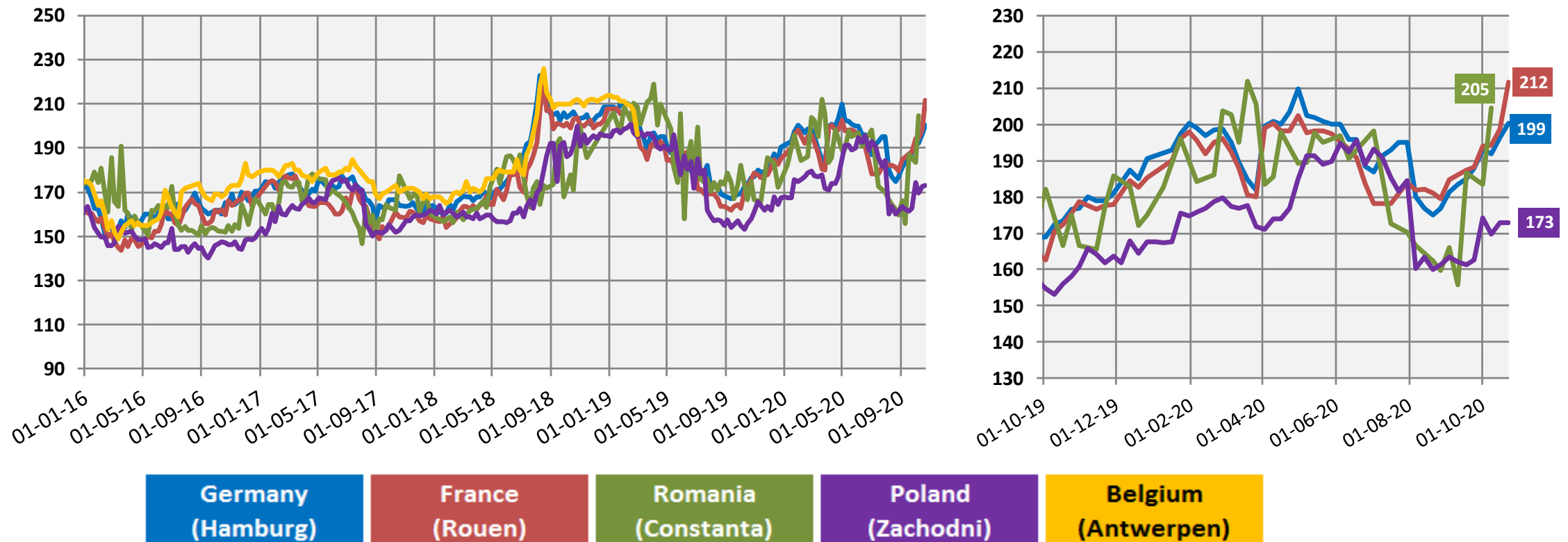
LAST UPDATED: 29/10/2020

	2020/21 (proj.)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	9.819	5.615	1.736	22.157	840	1.763	326	2.103	182	44.540
Usable production	115.893	54.293	7.208	60.197	8.877	1.206	8.143	11.149	4.552	271.519
Area (thousand ha)	20.802	11.328	2.165	8.893	2.177	228	2.583	2.650	1.571	52.397
Yield (tonnes/ha)	6	5	3	7	4	5	3	4	3	5
Imports (from third countries)	3.500	1.000	2.500	22.000	45	100	55	1	161	29.361
Total supply	129.213	60.907	11.443	104.354	9.761	3.069	8.524	13.252	4.896	345.420
Total domestic use	95.974	44.319	9.022	83.068	7.214	643	6.792	10.064	3.830	260.925
Human consumption	41.462	363	8.083	4.705	2.961	155	992	52	23	58.795
Seed	4.600	2.131	400	402	300	29	350	500	270	8.981
Industrial uses	9.717	6.700	95	11.100	1.300		101	445	170	29.628
of which bioethanol/biofuel	3.740	437		6.164	700			344	14	11.398
Animal feed	39.500	34.800	400	66.500	2.600	452	5.300	9.000	3.340	161.892
Losses	695	326	43	361	53	7	49	67	27	1.629
Exports (to third countries)	24.000	10.500	1.271	3.000	169	14	199	3	18	39.174
Total use	119.974	54.819	10.292	86.068	7.383	657	6.991	10.066	3.848	300.099
Ending stocks**	9.238	6.089	1.151	18.286	2.378	2.412	1.533	3.186	1.048	45.321
Change in stocks**	-581	474	-585	-3.871	1.539	649	1.207	1.083	866	781

\* Marketing year: from July to June

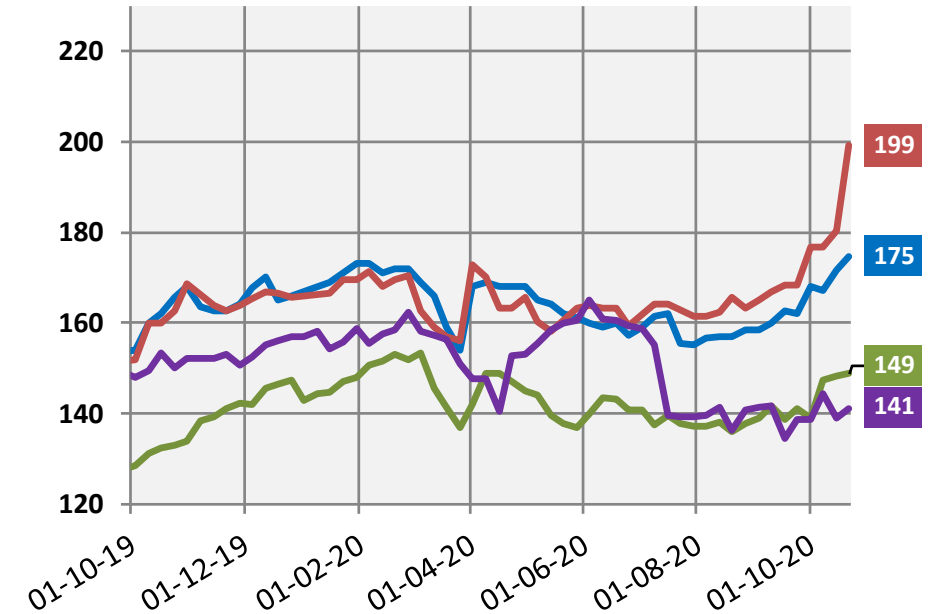
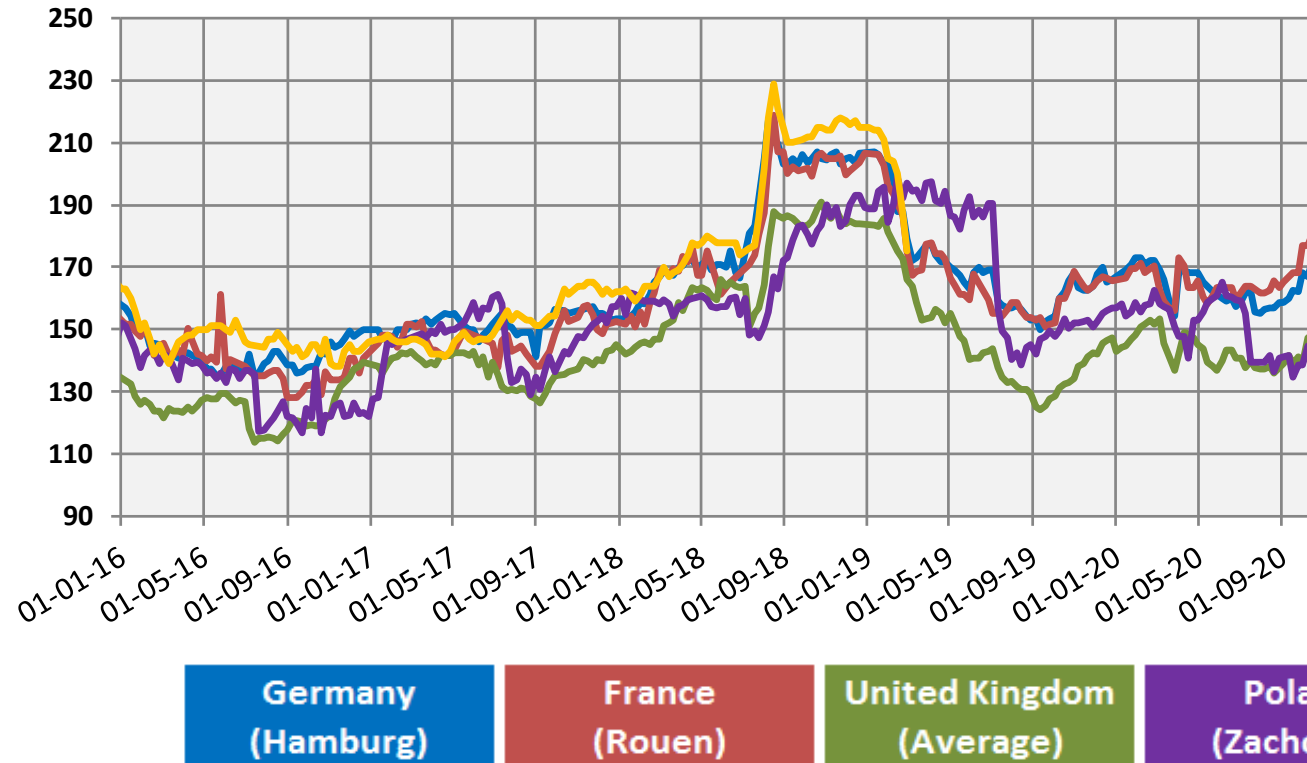
\*\* At the end of the marketing year

# EU market prices for milling wheat – (EUR per tonne)



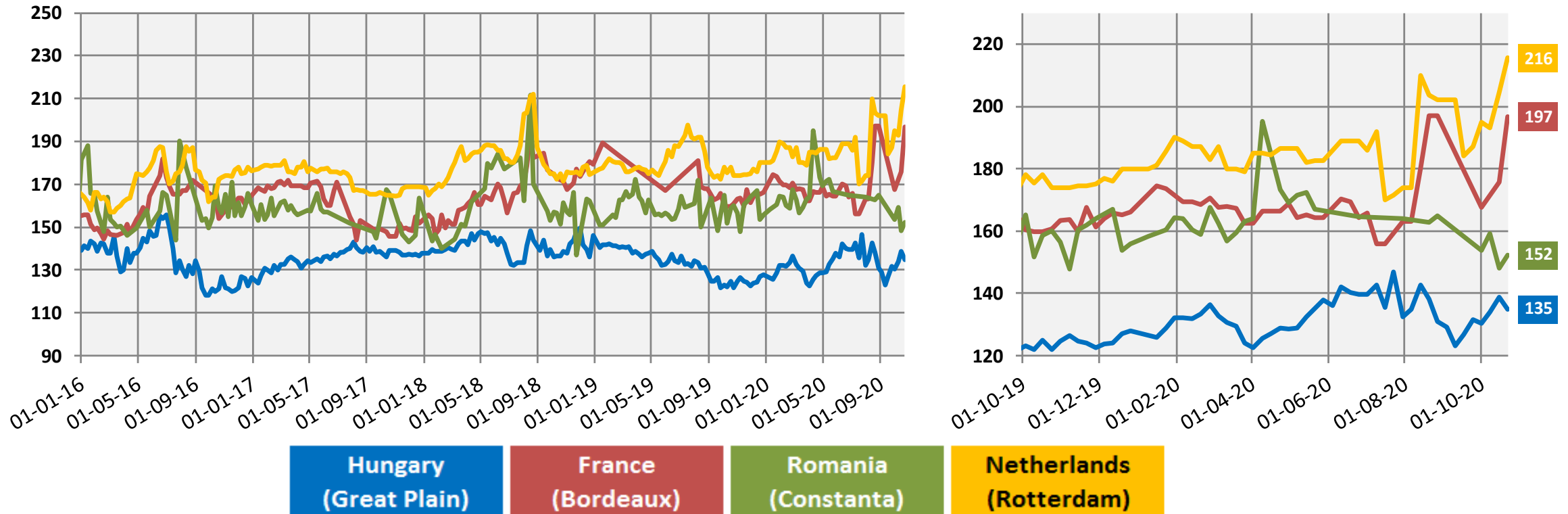
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# EU market prices for feed barley – (EUR per tonne)



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

# EU market prices for maize – (EUR per tonne)

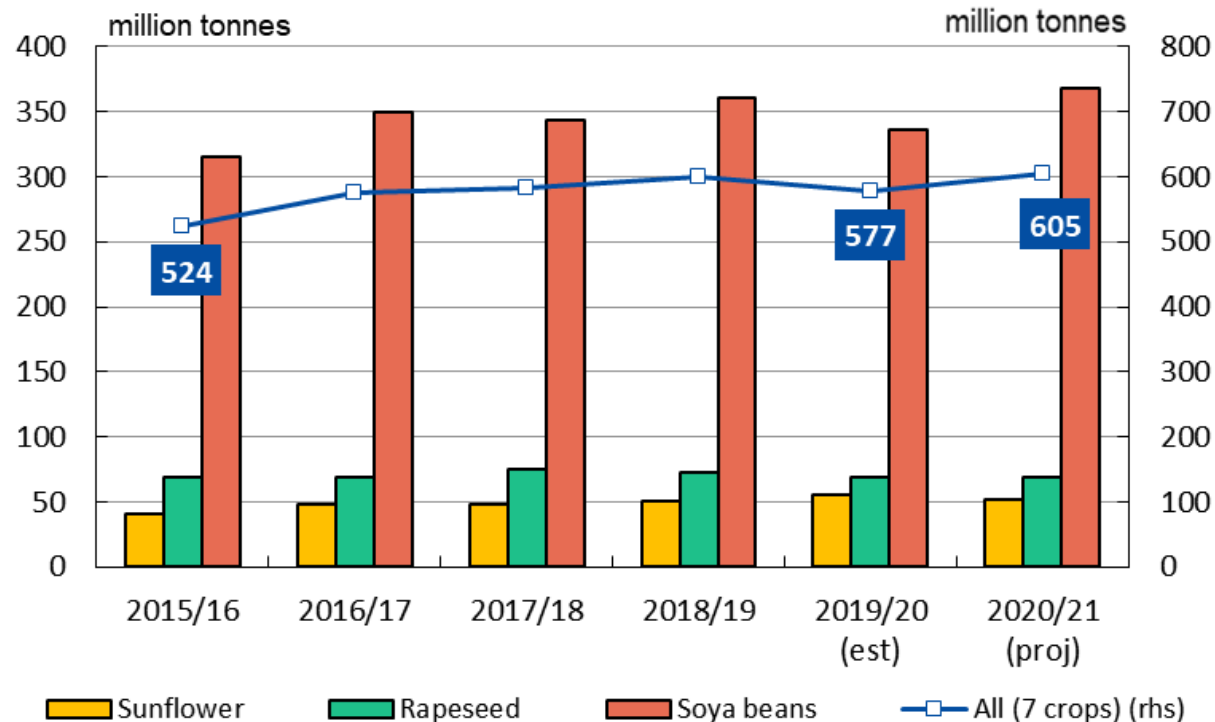


Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1



# World and EU Oilseeds Forecasts and Prices

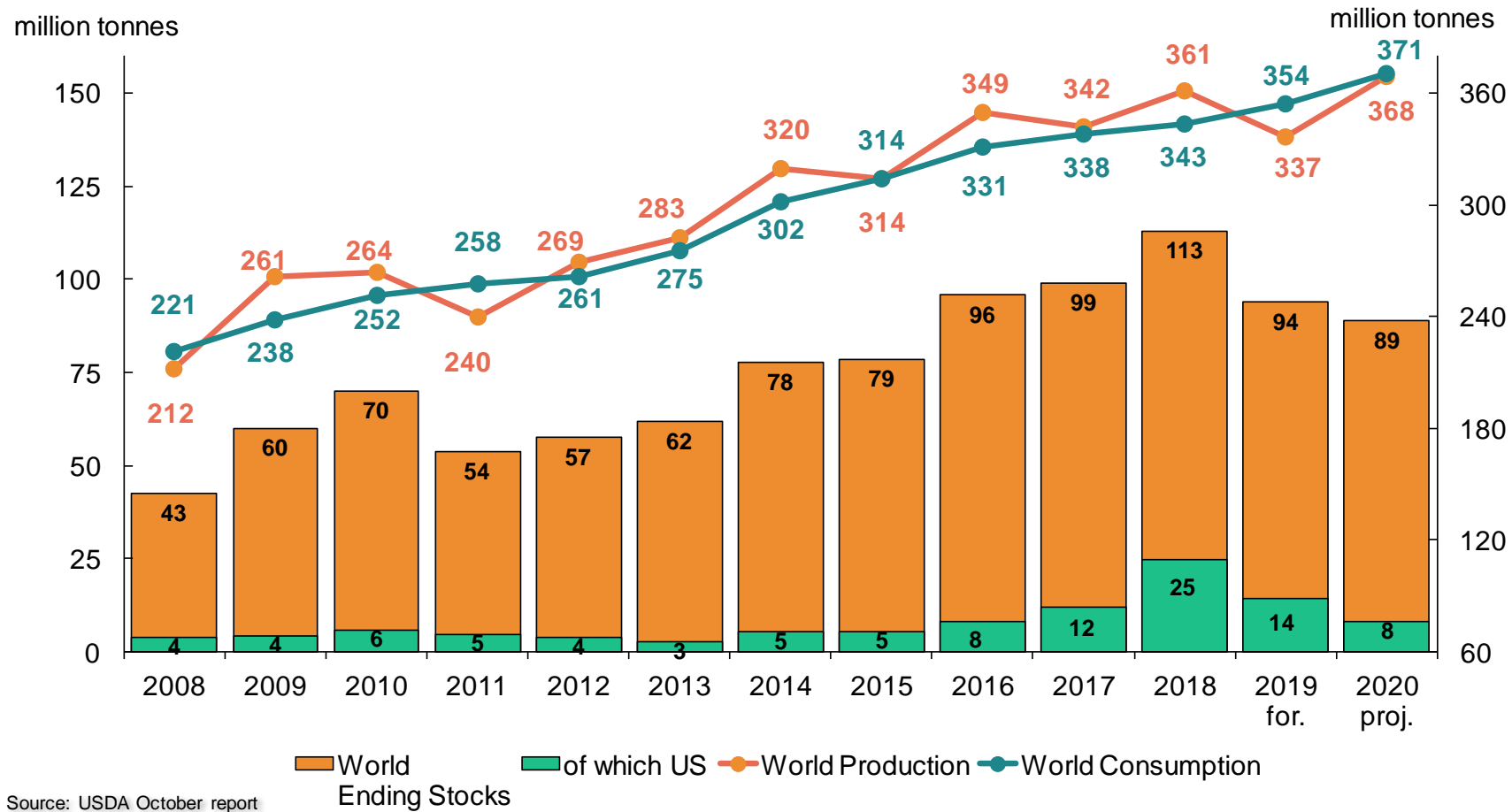
# 2020/21 World Oilseeds (USDA)



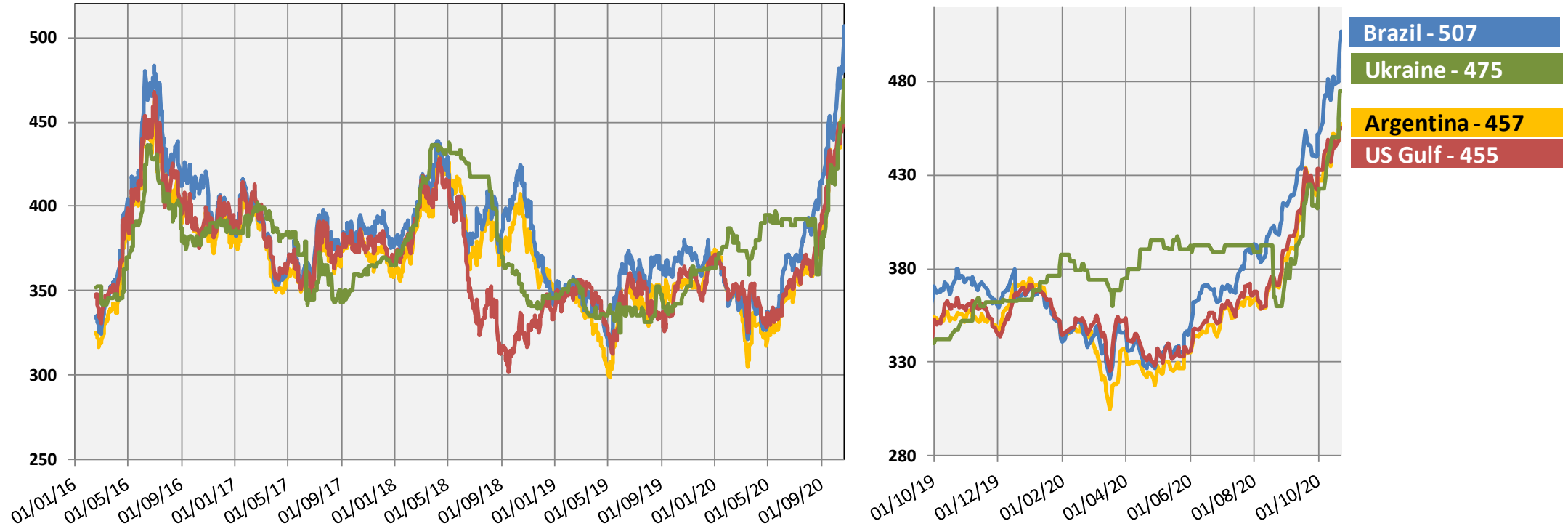
## 20/21 outlook (changes y/y):

Total Oilseeds:	605 m t	↓
• Soya beans:	368 m t	↓
• Rapeseed:	69 m t	↑
• Sunflower:	51 m t	↓

# World soya: USDA

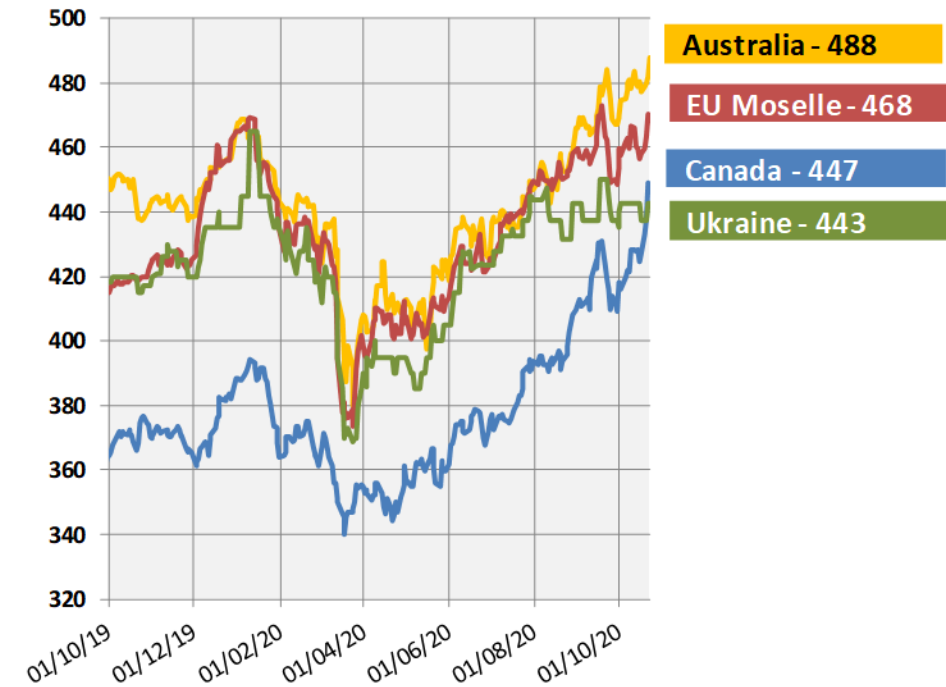
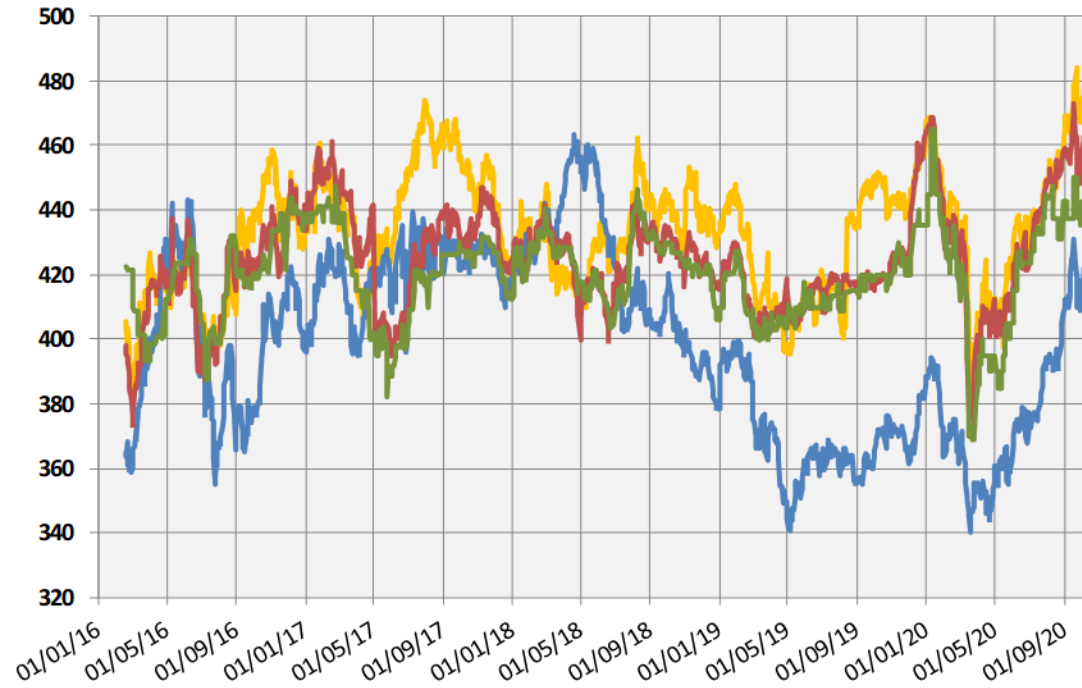


# World export prices soya beans (USD/tonne)



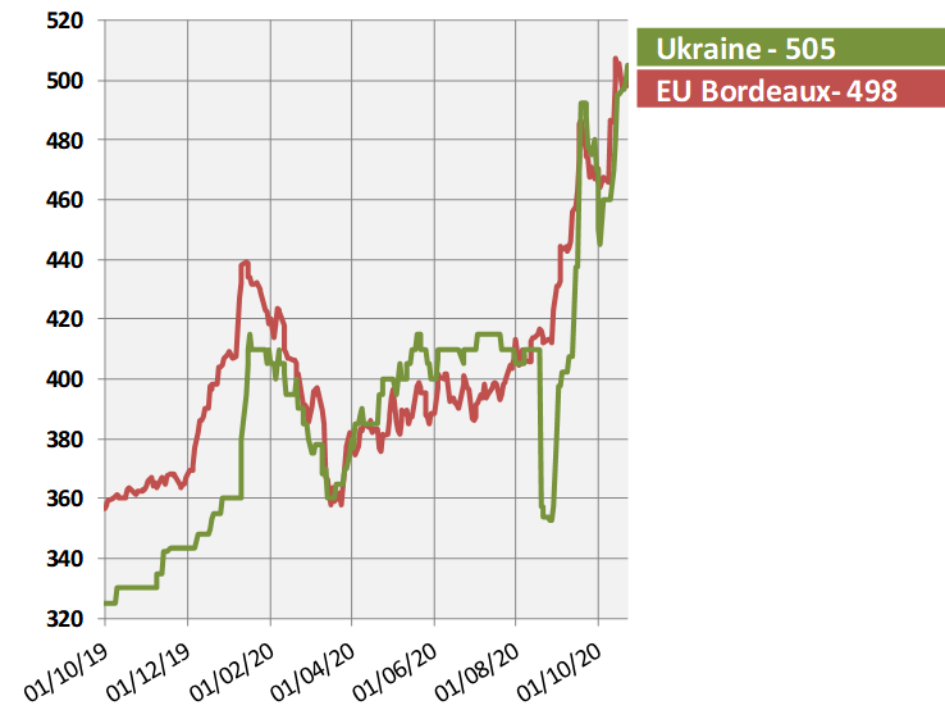
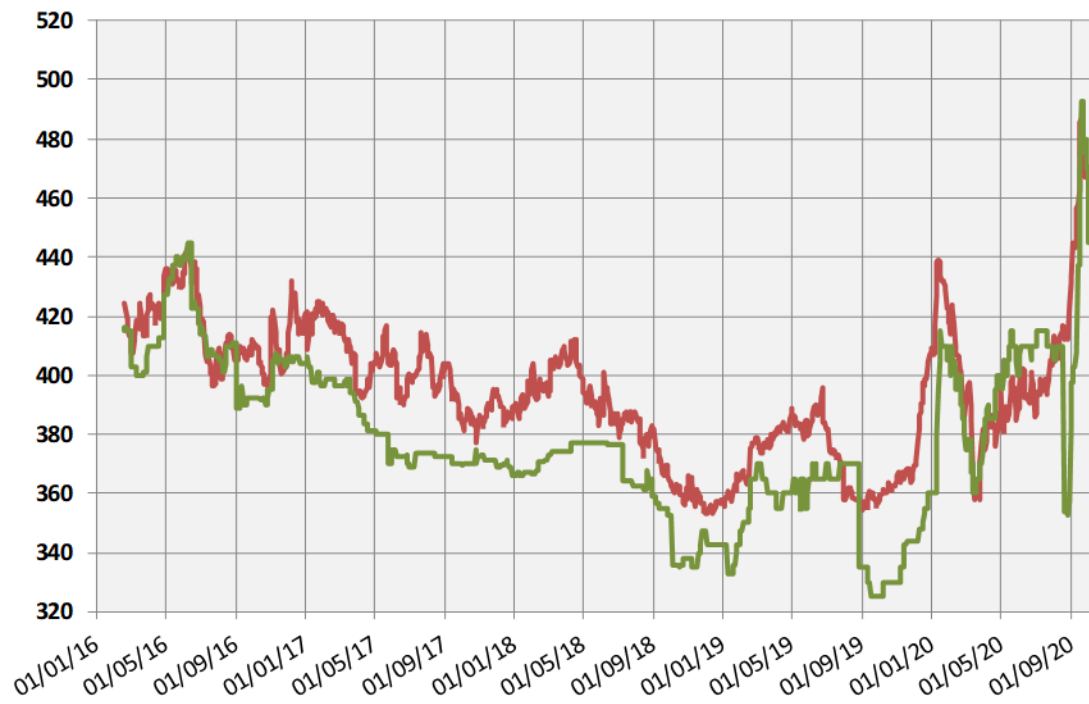
Source: International Grains Council

# World export prices for rapeseed – (USD/tonne)



Source: International Grains Council

# World export prices for sunflower – (USD/tonne)



Source: International Grains Council

# EU oilseeds 2020/21 forecast

## EU OILSEEDS AREA

(million hectares)

	5-year trimmed average	2019/20	October	2020/21 vs. 2019/20 (%)	vs. 5-y AVG (%)
Rapeseed	6.06	5.12	5.18	1.3	-14.5
Sunflower	4.20	4.34	4.44	2.4	5.8
Soya Beans	0.89	0.91	0.94	3.6	5.7
<b>TOTAL</b>	<b>11.15</b>	<b>10.37</b>	<b>10.57</b>	<b>2.0</b>	<b>-5.2</b>

## EU OILSEEDS PRODUCTION

(million tonnes)

	5-year trimmed average	2019/20	October	2020/21 vs. 2019/20 (%)	vs. 5-y AVG (%)
Rapeseed	19.15	15.32	15.90	3.8	-17.0
Sunflower	9.33	10.25	8.87	-13.4	-4.9
Soya Beans	2.50	2.74	2.56	-6.7	2.5
<b>TOTAL</b>	<b>30.65</b>	<b>28.31</b>	<b>27.33</b>	<b>-3.5</b>	<b>-11.8</b>

Sources : EC - DG AGRI.

# Oilseeds balance sheet (EU)

## OILSEEDS SUPPLY & DEMAND

(thousand metric tonnes)

	2019/20 fc				2020/21 proj.			
<i>last updated: 29/10/2020</i>	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
<b>Beginning stocks</b>	<b>1,372</b>	<b>1,990</b>	<b>900</b>	<b>4,263</b>	<b>500</b>	<b>1,500</b>	<b>1,200</b>	<b>3,200</b>
Usable production	15,321	2,743	10,247	28,311	15,904	2,558	8,870	27,332
Area (thousand ha)	5,119	908	4,339	10,365	5,183	941	4,445	10,568
Yield (tonnes/ha)	2.99	3.02	2.36	2.73	3.07	2.72	2.00	2.59
Imports (from third countries)	6,235	14,729	971	21,935	5,000	15,700	1,000	21,700
<b>Total supply</b>	<b>22,929</b>	<b>19,462</b>	<b>12,118</b>	<b>54,509</b>	<b>21,404</b>	<b>19,758</b>	<b>11,070</b>	<b>52,232</b>
Domestic use	22,098	17,721	10,356	50,175	20,404	18,627	9,427	48,458
of which crushing	(21,369)	(15,572)	(9,125)	(46,066)	(19,696)	(16,441)	(8,331)	(44,467)
Exports (to third countries)	330	241	562	1,133	200	231	543	974
<b>Total use</b>	<b>22,429</b>	<b>17,962</b>	<b>10,918</b>	<b>51,309</b>	<b>20,604</b>	<b>18,858</b>	<b>9,970</b>	<b>49,432</b>
<b>Ending stocks</b>	<b>500</b>	<b>1,500</b>	<b>1,200</b>	<b>3,200</b>	<b>800</b>	<b>900</b>	<b>1,100</b>	<b>2,800</b>
<b>Change in stocks</b>	<b>-872</b>	<b>-490</b>	<b>300</b>	<b>-1,063</b>	<b>300</b>	<b>-600</b>	<b>-100</b>	<b>-400</b>



# EU Protein Crops and Feed Protein Balance Sheet

# EU protein crops 2020/21 forecast

## EU PROTEIN CROPS AREA

(million hectares)

	5-year trimmed average	2019/20	2020/21		
			October	vs. 2019/20 (%)	vs. 5-y AVG (%)
Field peas	0.80	0.79	0.84	6.9	5.3
Broad beans	0.47	0.42	0.45	7.4	-3.3
Sweet lupins	0.17	0.17	0.18	6.4	7.6
<b>TOTAL</b>	<b>1.46</b>	<b>1.37</b>	<b>1.47</b>	<b>7.0</b>	<b>0.6</b>

## EU PROTEIN CROPS PRODUCTION

(million tonnes)

	5-year trimmed average	2019/20	2020/21		
			October	vs. 2019/20 (%)	vs. 5-y AVG (%)
Field peas	1.97	2.01	2.14	6.4	8.5
Broad beans	1.16	1.04	1.22	17.3	4.7
Sweet lupins	0.26	0.21	0.24	11.2	-7.1
<b>TOTAL</b>	<b>3.43</b>	<b>3.27</b>	<b>3.60</b>	<b>10.1</b>	<b>5.0</b>

Sources : EC - DG AGRI.

# EU+UK Feed Protein Balance Sheet 2019/20

September 2020

## EU + UK Feed Protein Balance Sheet

2019/20	Million tonnes						Protein content (feed use) (G)	Million tonnes (crude protein)			
Protein source	Total EU production (A)	EU imports (B)	EU exports (C)	Total EU domestic use (D)	EU total feed use (E)	Feed use EU origin (F)		EU total feed use (H) = (E) * (G)	Feed use EU origin (I) = (F) * (G)	% feed use of EU origin (I) / (H)	% of total feed use
<b>CROPS</b>					181.7	162.0		18.32	16.59	91%	22%
<b>CO-PRODUCTS</b>					84.6	45.4		25.32	9.49	37%	31%
OILSEED MEALS	30.1	23.0	1.4	51.7	51.5	14.3		20.53	4.96	24%	25%
OTHERS CO-PRODUCTS	34.1	3.8	1.3	36.6	33.1	31.1		4.80	4.52	94%	6%
<b>NON-PLANT SOURCES</b>					8.2	8.0		2.15	2.02	94%	3%
<b>ROUGHAGE</b>					1302	1302		37	37	100%	45%
<b>TOTAL</b>								83	65	79%	

### Legend

Low-Pro: Less than 15% protein content

Medium-Pro: 15-30% protein content

High-Pro: 30-50% protein content

Super-Pro: Over 50% protein content

There is only limited inter-changeability between proteins from different categories, for instance between proteins from cereals and proteins from soya meal (due to its amino acid pattern, soya protein is used more efficiently than other plant proteins in animal nutrition).



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# EU Feed Protein Balance Sheet 2020/21

October 2020

## EU Feed Protein Balance Sheet (forecast)

2020/21	Million tonnes						Protein content (feed use) (G)	Million tonnes (crude protein)			
Protein source	Total EU production (A)	EU imports (B)	EU exports (C)	Total EU domestic use (D)	EU total feed use (E)	Feed use EU origin (F)		EU total feed use (H) = (E) * (G)	Feed use EU origin (I) = (F) * (G)	% feed use of EU origin (I) / (H)	% of total feed use
<b>CROPS</b>					166.5	142.8		16.70	14.65	88%	23%
<b>CO-PRODUCTS</b>					77.9	40.5		23.65	8.50	36%	32%
OILSEED MEALS	28.4	21.6	2.0	48.0	47.8	12.6		19.19	4.37	23%	26%
OTHERS CO-PRODUCTS	30.9	4.1	1.6	33.3	30.1	27.9		4.46	4.14	93%	6%
<b>NON-PLANT SOURCES</b>					8.0	7.8		2.05	1.91	93%	3%
<b>ROUGHAGE</b>					1062	1062		31	31	100%	42%
<b>TOTAL</b>								73	56	76%	

### Legend

Low-Pro: Less than 15% protein content

Medium-Pro: 15-30% protein content

High-Pro: 30-50% protein content

Super-Pro: Over 50% protein content

There is only limited inter-changeability between proteins from different categories, for instance between proteins from cereals and proteins from soya meal (due to its amino acid pattern, soya protein is used more efficiently than other plant proteins in animal nutrition).

47.82	45.71	96%
3.97	3.49	88%
19.33	4.91	25%
2.12	1.80	85%



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# Thank you

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

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



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