



Cereals, Oilseeds and Protein Crops

Arable Crops Market Situation

Civil Dialog Group
7th September 2018



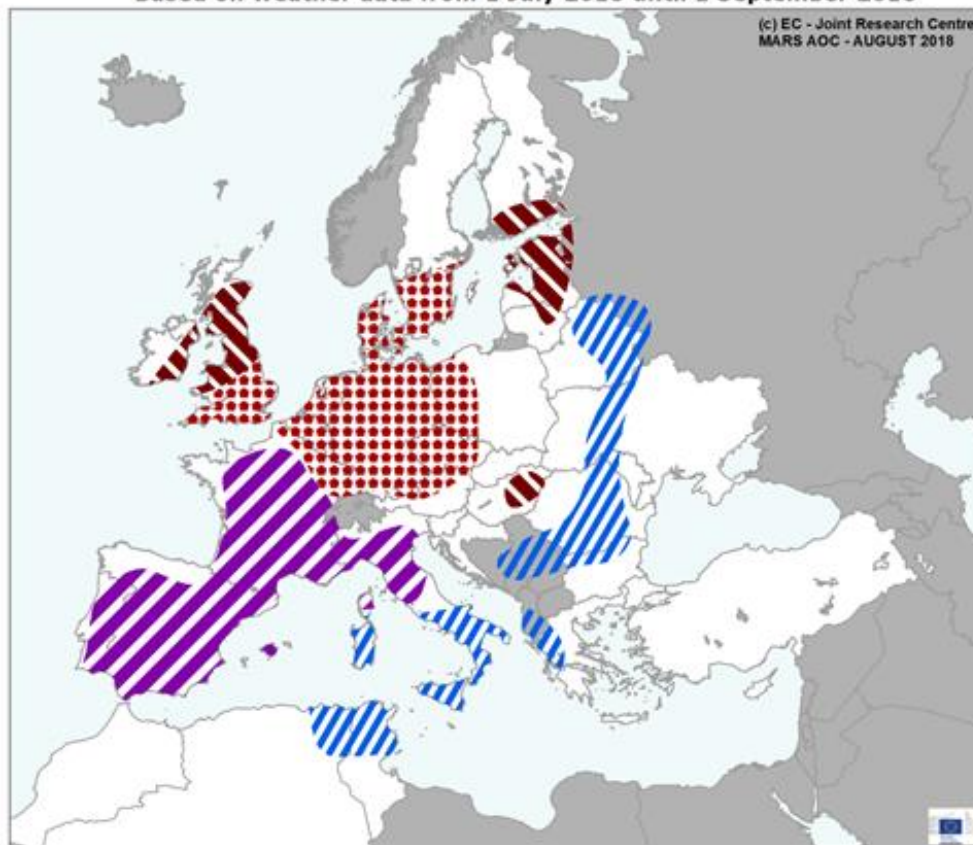
Agro-Weather Conditions



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AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 July 2018 until 1 September 2018



(c) EC - Joint Research Centre
MARS AOC - AUGUST 2018



Hot and dry conditions

Drought



Rain surplus

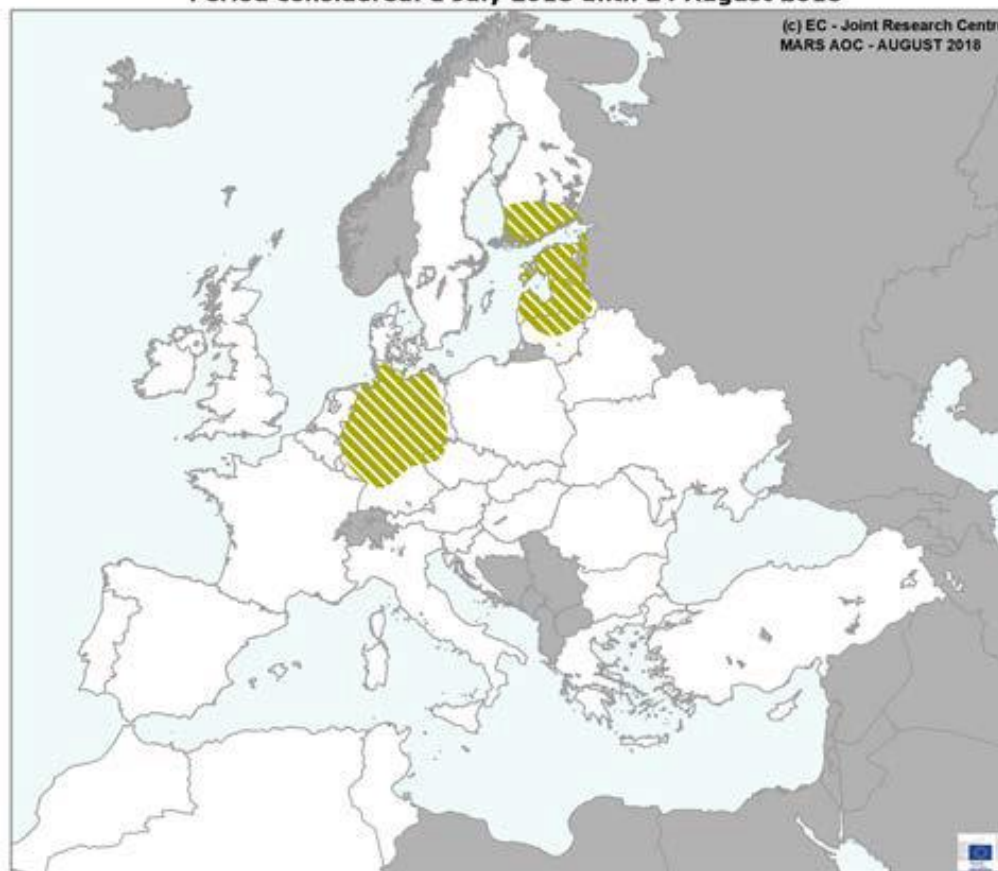
Heat wave



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AREAS OF CONCERN - WINTER CROPS

Period considered: 1 July 2018 until 24 August 2018



(c) EC - Joint Research Centre
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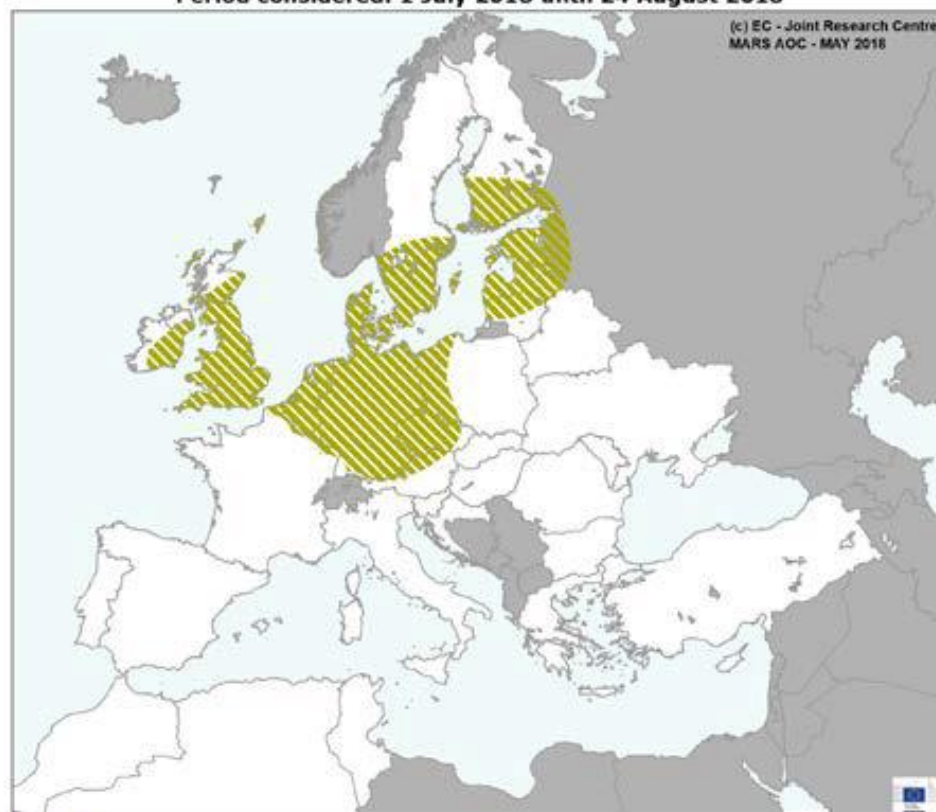
Storage organs impacted




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AREAS OF CONCERN - SPRING CROPS

Period considered: 1 July 2018 until 24 August 2018



 Storage organs impacted



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AREAS OF CONCERN - SUMMER CROPS

Period considered: 1 July 2018 until 24 August 2018

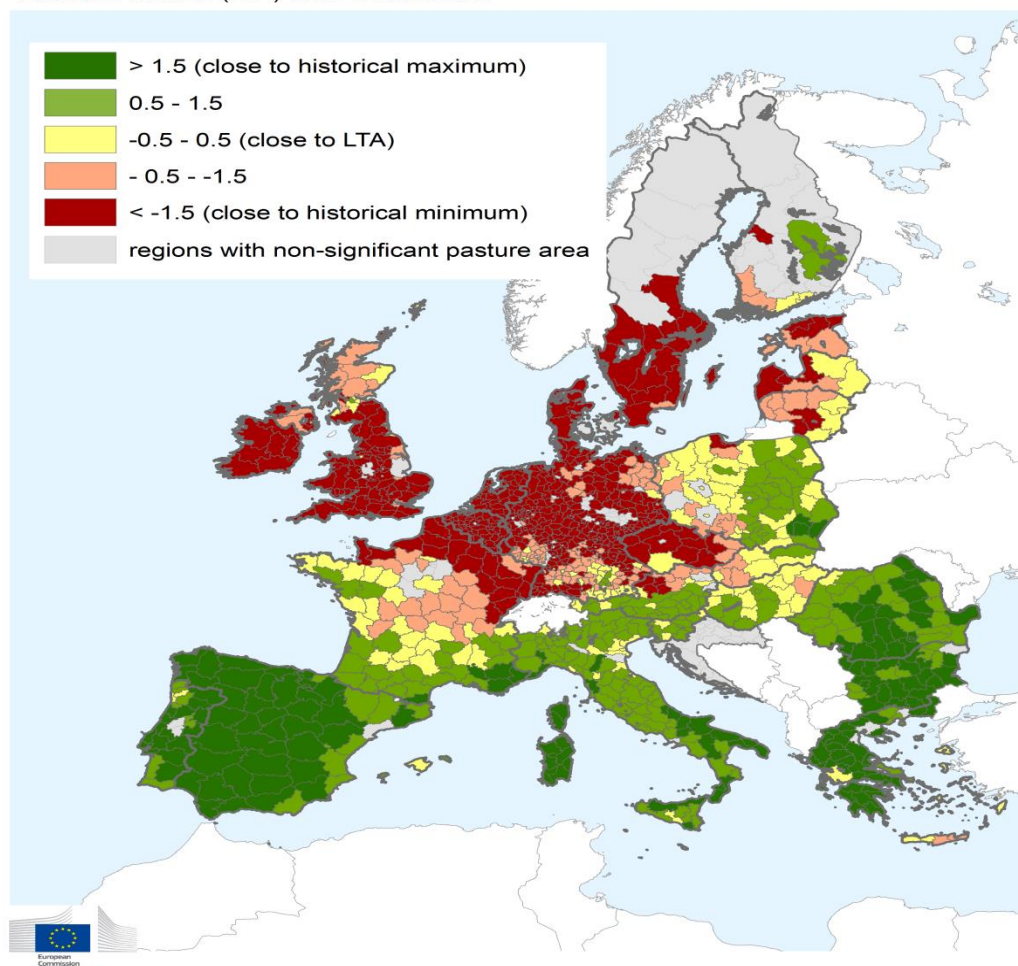


Storage organs impacted

Relative index of pasture productivity

Period of analysis: 1 July - 20 August 2018

Index based on Copernicus GEOV2 fAPAR 10-day product.
Historical archive (LTA) from 1999 to 2017





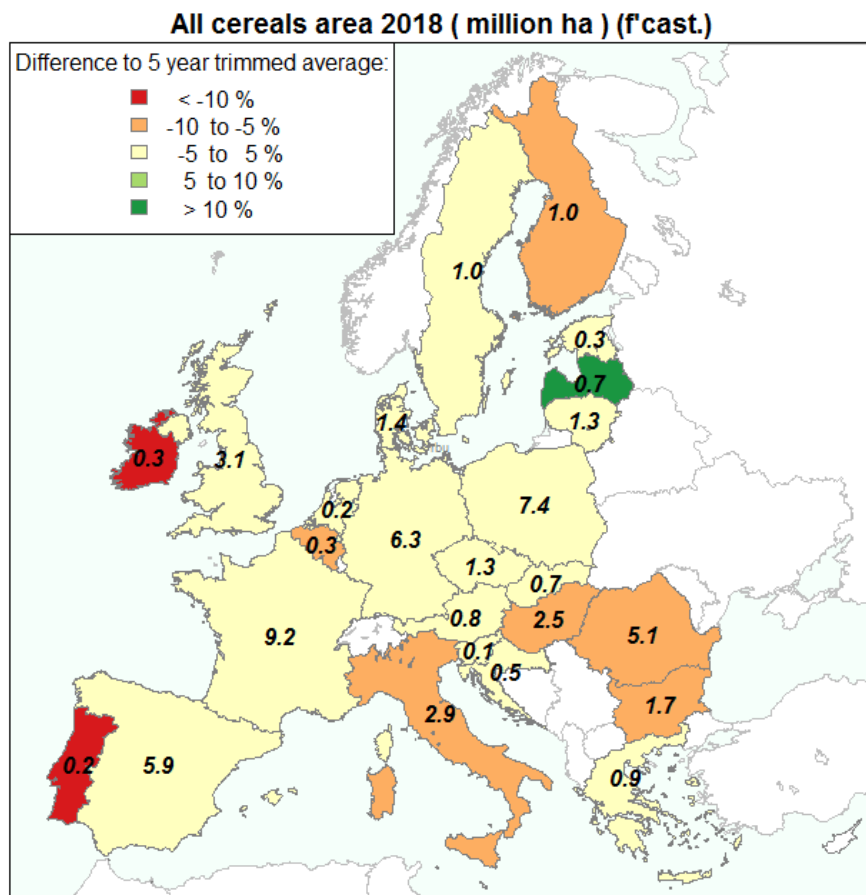
Cereals

EU 28- 2018 Area Forecast

| EVOLUTION OF THE EU CEREALS AREA | | | | | |
|----------------------------------|-------------|-------------|-------------------|------------------|-----------------------|
| Million ha | 2016 | 2017 | 2018 July fcst | 2018 Aug fcst | % change 2017/2018 |
| TOTAL | 56,8 | 55,6 | 55,1 | 55,1 | -0,9 |
| Soft wheat | 24,3 | 23,4 | 23,1 | 23,0 | -1,4 |
| Durum wheat | 2,8 | 2,7 | 2,5 | 2,5 | -5,3 |
| Barley | 12,3 | 12,1 | 12,3 | 12,3 | 1,8 |
| Maize | 8,6 | 8,4 | 8,4 | 8,4 | 0,4 |
| Rye | 1,9 | 2,0 | 2,0 | 2,0 | -1,6 |
| Oats | 2,6 | 2,7 | 2,7 | 2,7 | -0,1 |

Sources : DG AGRI - G4

2018-19 MY vs 5Y average



Calculations and cartography: European Commission DG AGRI G4 2018.07.24 © EuroGeographics for the administrative boundaries

EU 28- 2018 Production Forecasts

| EVOLUTION OF THE EU CEREALS USABLE PRODUCTION | | | | | |
|---|--------------|--------------|------------------------|-----------------------|-----------------------|
| Million tonnes | 2016/2017 | 2017/2018 | 2018/2019 July fcst | 2018/2019 Aug fcst | % change 2017/2018 |
| TOTAL | 296,7 | 307,3 | 293,5 | 287,1 | -6,6 |
| Soft wheat | 133,9 | 142,0 | 133,5 | 128,8 | -9,3 |
| Durum wheat | 9,6 | 9,3 | 8,7 | 8,8 | -5,4 |
| Barley | 59,4 | 58,8 | 57,6 | 56,2 | -4,4 |
| Maize | 62,8 | 65,4 | 63,7 | 64,2 | -1,8 |
| Rye | 7,2 | 7,3 | 6,7 | 6,5 | -11,0 |
| Oats | 8,0 | 8,2 | 8,1 | 8,1 | -1,2 |

Sources : DG AGRI - G4

EU 28 - 2018 Production Forecast

Most important producers
(80% of EU production)
total cereals prod changes 2017/2018

| | |
|----|--------|
| FR | -5,5% |
| DE | -17,1% |
| PL | -15,2% |
| IT | 2,3% |
| UK | -5,9% |
| ES | 21,8% |
| HU | 9,5% |
| RO | -11,1% |

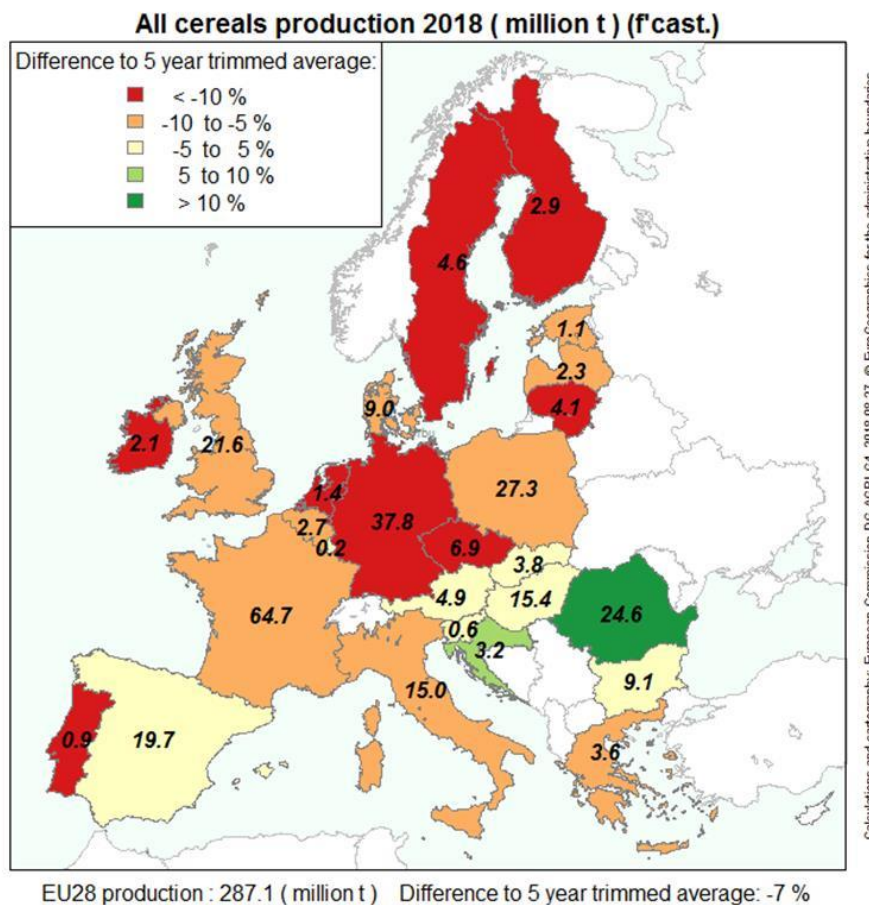
Sources : DG AGRI - G4

EU 28 – 2018 Production Forecasts

2018/2019 Marketing Year *usable production*

| Million tonnes | EC DG AGRI 30-Aug | Stratégie Grain 09-Aug | ADM Europe 30-Aug |
|----------------|----------------------------------|------------------------------|----------------------|
| Total | 287,1 | 282,4 | 281,1 |
| Soft Wheat | 128,8 | 127,7 | 129,1 |
| Durum Wheat | 8,8 | 8,2 | 9,1 |
| Barley | 56,2 | 57,1 | 54,8 |
| Maize | 64,2 | 61,3 | 60,7 |
| Rye | 6,5 | 6,6 | 6,3 |

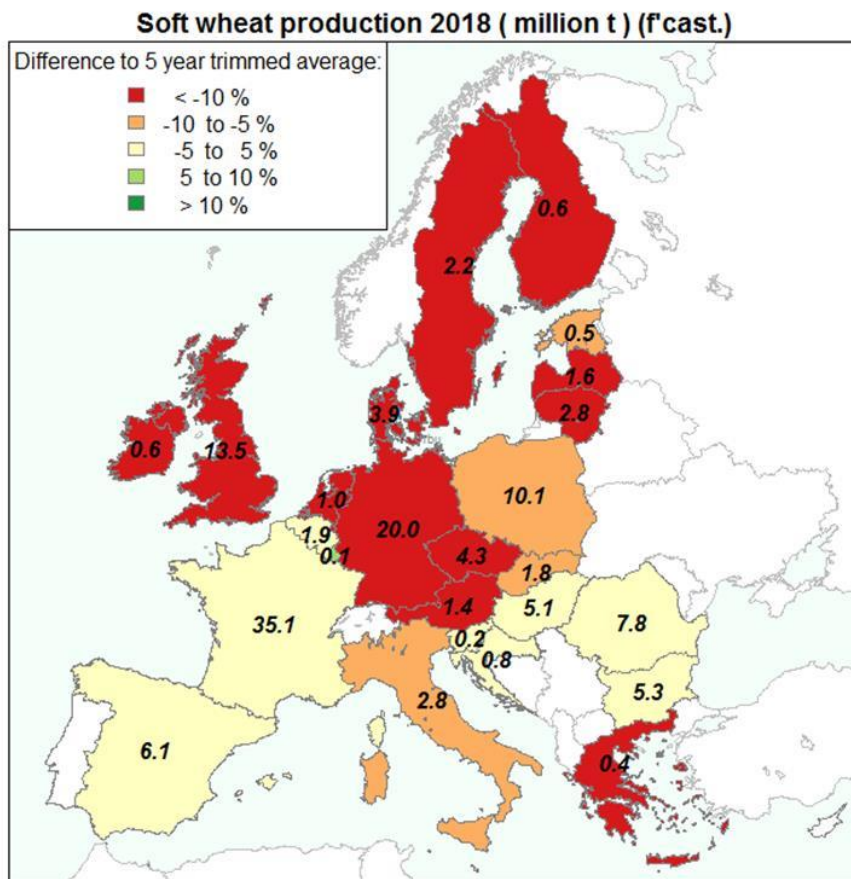
2018-19 MY vs 5Y average





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2018-19 MY vs 5Y average

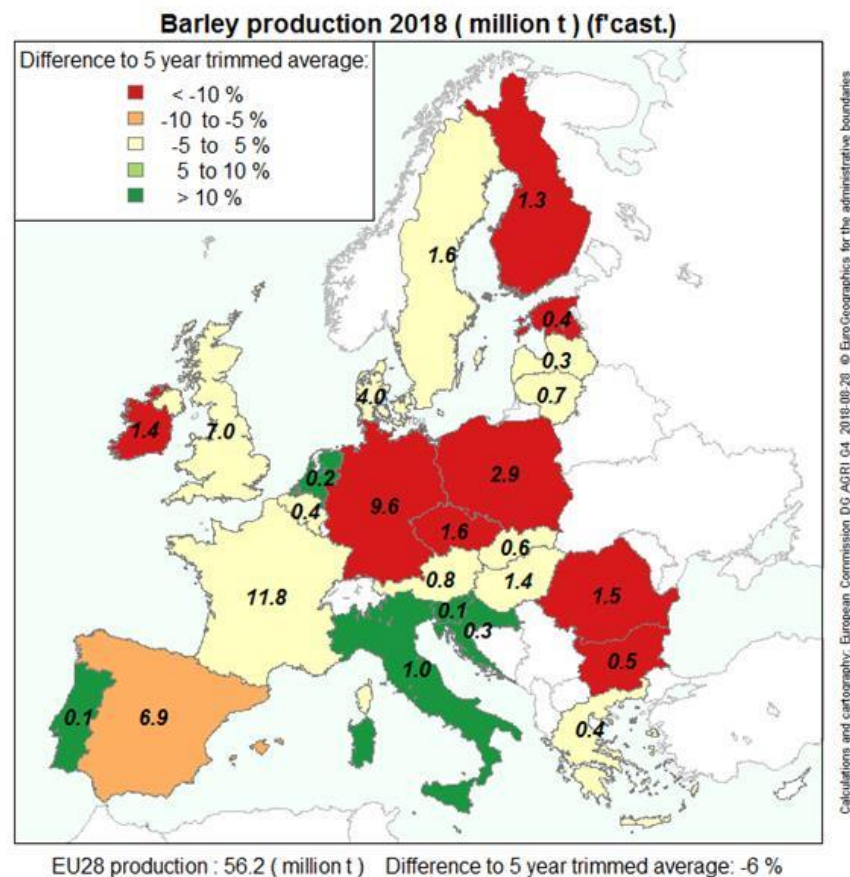


Calculations and cartography: European Commission DG AGRI G4 2018-08-27 © EuroGeographics for the administrative boundaries

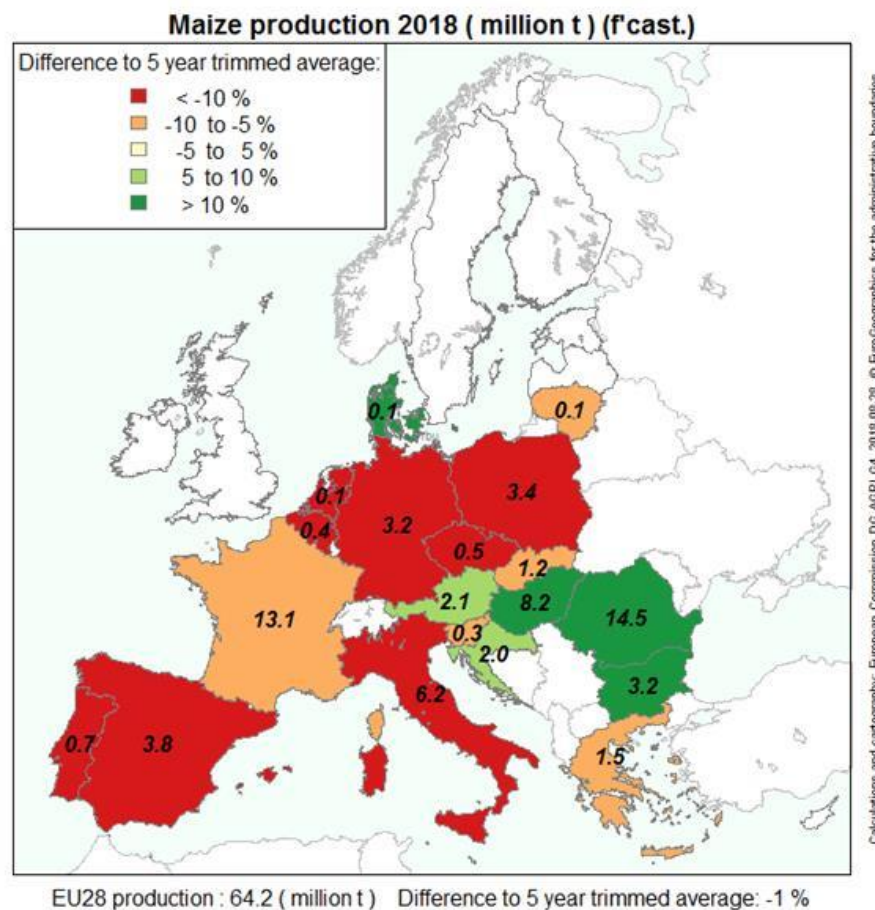


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2018-19 MY vs 5Y average



2018-19 MY vs 5Y average



EU 28 Cereals Balance Sheet

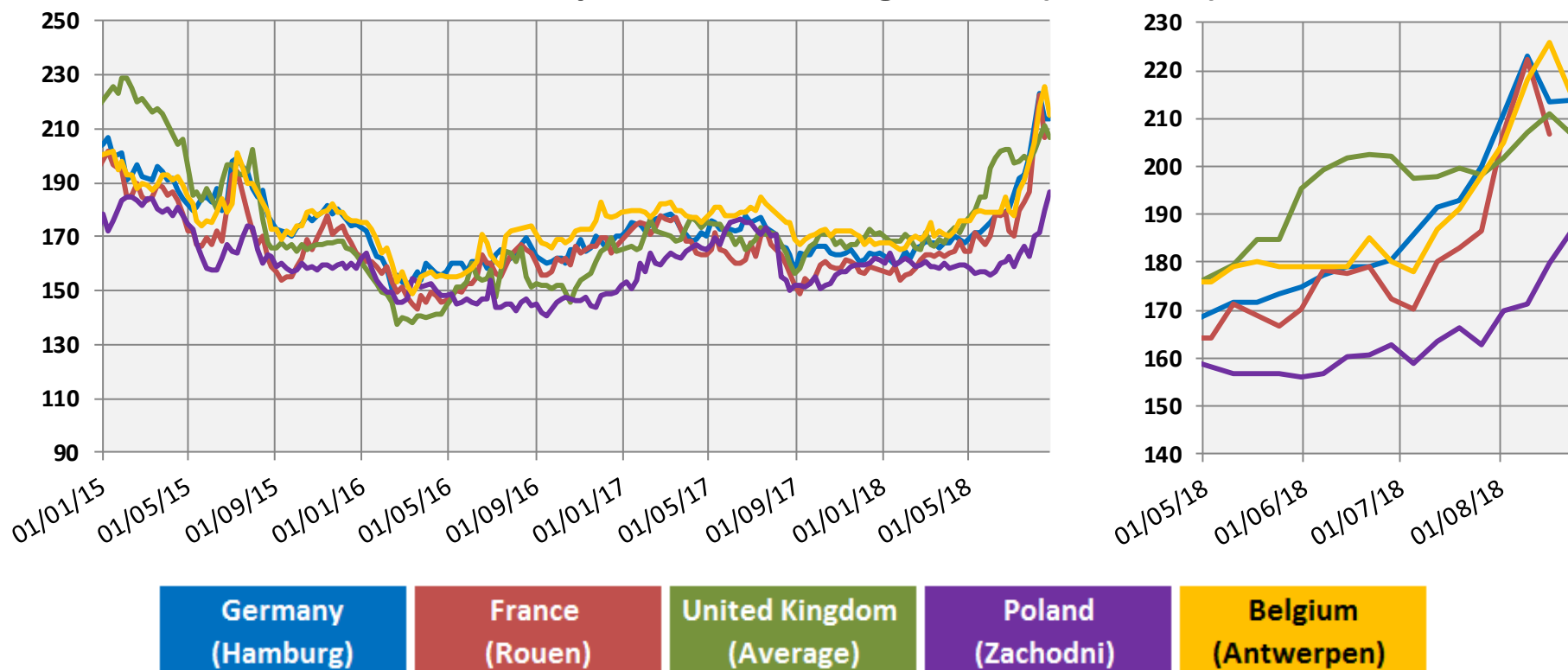
Thousand metric tonnes

| LAST UPDATED: 30/08/2018 | 2018/19 (forecast) | | | | | | | | | |
|------------------------------------|--------------------|---------------|---------------|----------------|--------------|--------------|--------------|---------------|--------------|----------------|
| | Common wheat | Barley | Durum wheat | Maize | Rye | Sorghum | Oats | Triticale | Others | TOTAL CEREALS |
| Beginning stocks | 18.088 | 4.972 | 2.901 | 24.015 | 667 | 373 | 469 | 941 | 1.236 | 53.662 |
| Usable production | 128.777 | 56.219 | 8.826 | 64.225 | 6.512 | 743 | 7.832 | 10.047 | 3.886 | 287.066 |
| <i>Area (thousand ha)</i> | 23.041 | 12.302 | 2.546 | 8.397 | 1.964 | 142 | 2.683 | 2.552 | 1.421 | 55.047 |
| <i>Yield (tonnes/ha)</i> | 5,6 | 4,6 | 3,5 | 7,6 | 3,3 | 5,2 | 2,9 | 3,9 | 2,7 | 5,2 |
| Imports (from third countries) | 4.000 | 500 | 2.057 | 13.966 | 67 | 163 | 5 | | 158 | 20.915 |
| Total supply | 150.865 | 61.691 | 13.784 | 102.206 | 7.246 | 1.279 | 8.306 | 10.988 | 5.279 | 361.644 |
| Total domestic use | 118.820 | 48.992 | 9.690 | 77.533 | 7.013 | 875 | 7.724 | 10.919 | 4.483 | 286.049 |
| Human consumption | 48.134 | 363 | 8.056 | 5.426 | 3.068 | 156 | 1.152 | 52 | 23 | 66.430 |
| Seed | 4.785 | 2.139 | 500 | 407 | 410 | 29 | 450 | 532 | 69 | 9.320 |
| Industrial uses | 10.800 | 9.089 | 95 | 11.700 | 1.666 | | 102 | 446 | 102 | 33.998 |
| <i>of which bioethanol/biofuel</i> | 4.665 | 437 | | 6.200 | 953 | | | 344 | 14 | 12.613 |
| Animal feed | 54.200 | 37.000 | 1.000 | 59.400 | 1.800 | 690 | 5.950 | 9.800 | 4.250 | 174.090 |
| Losses | 900 | 400 | 40 | 600 | 70 | | 70 | 90 | 40 | 2.210 |
| Exports (to third countries) | 20.000 | 8.000 | 1.169 | 2.671 | 147 | 3 | 208 | 2 | 8 | 32.207 |
| Total use | 138.820 | 56.992 | 10.859 | 80.204 | 7.160 | 877 | 7.932 | 10.921 | 4.491 | 318.256 |
| Ending stocks** | 12.045 | 4.699 | 2.925 | 22.002 | 86 | 401 | 374 | 67 | 788 | 43.388 |
| Change in stocks** | -6.043 | -273 | 24 | -2.013 | -581 | 28 | -95 | -874 | -448 | -10.274 |

* Marketing year: from July to June

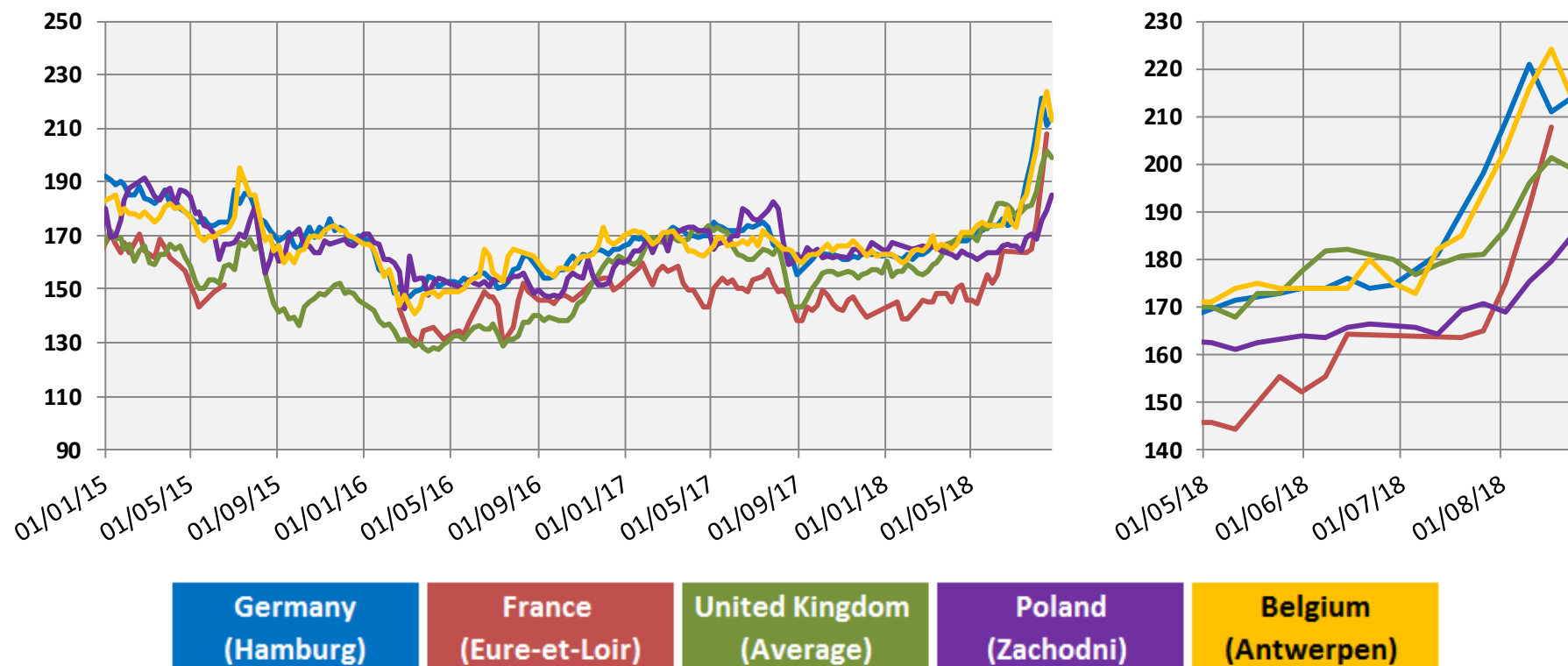
** At the end of the marketing year

EU Market prices for milling wheat (€/tonne)



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

EU Market prices for feed wheat (€/tonne)



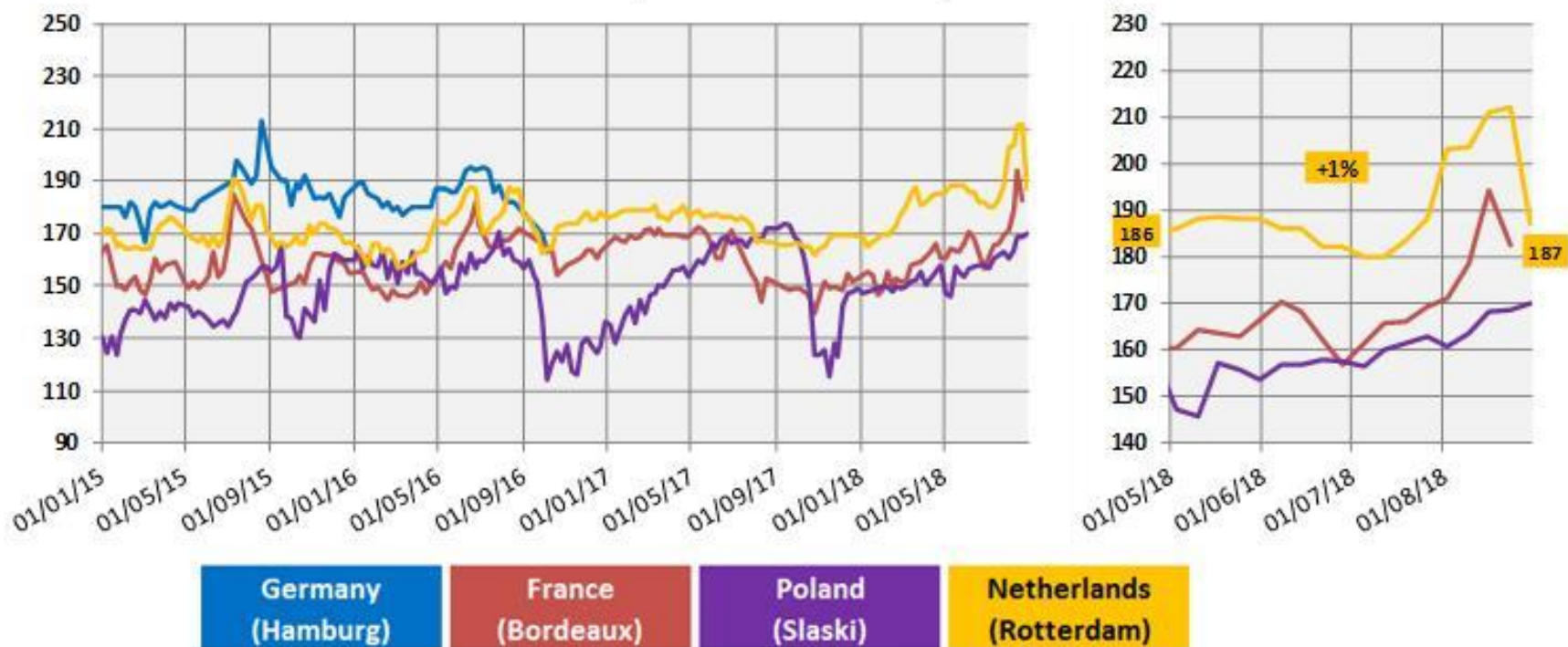
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

EU Market prices for feed barley (€/tonne)



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

EU Market prices for maize (€/tonne)



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



Oilseeds

EU Oilseeds

EU OILSEEDS AREA

| | AVG 5 yrs | 2017/18 | 2018/19 | 2018/19 | %change | %change |
|--------------|-------------|-------------|--------------|--------------|------------|--------------|
| Million ha | trimmed | | July | August | 2017/18 | 5yrs trimmed |
| Rapeseed | 6.6 | 6.7 | 6.83 | 6.78 | 1.5 | 2.1 |
| Sunflower | 4.2 | 4.2 | 4.15 | 4.19 | -0.9 | -1.0 |
| Soja | 0.8 | 0.9 | 0.92 | 0.93 | -2.2 | 21.2 |
| TOTAL | 11.6 | 11.9 | 11.90 | 11.89 | 0.3 | 2.2 |

Sources : EC - DG AGRI

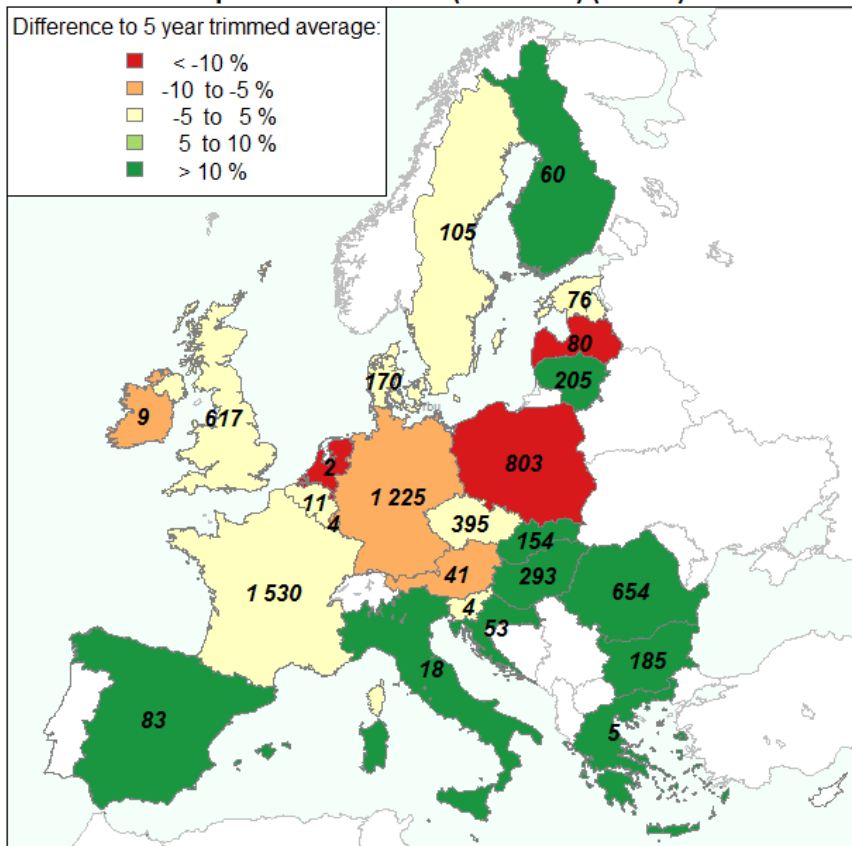
EU OILSEEDS PRODUCTION

| | AVG 5 yrs | 2017/18 | 2018/19 | 2018/19 | %change | %change |
|----------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Million tonnes | trimmed | | July | August | 2017/18 | 5yrs trimm. |
| Rapeseed | 21.6 | 22.0 | 19.7 | 19.2 | -12.4 | -10.9 |
| Sunflower | 9.1 | 10.4 | 10.4 | 10.3 | -0.5 | 13.3 |
| Soja | 2.2 | 2.6 | 2.8 | 2.8 | 6.4 | 25.1 |
| TOTAL | 32.9 | 34.9 | 32.9 | 32.3 | -7.5 | -1.8 |

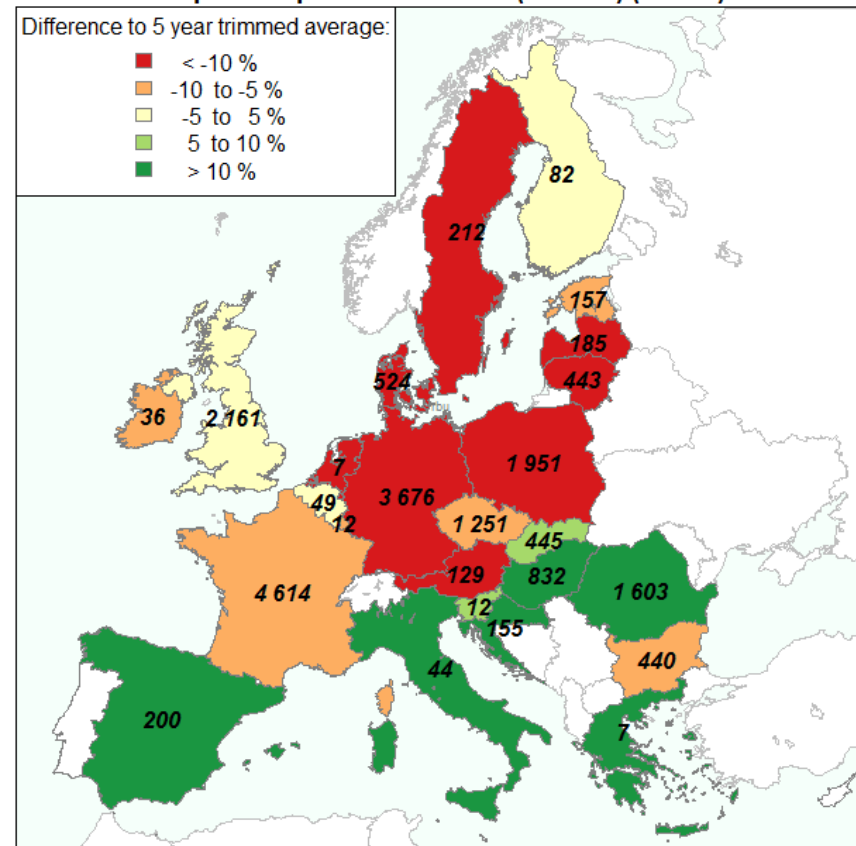
Sources : EC - DG AGRI

EU rapeseed

Rapeseed area 2018 (1000 ha) (f'cast.)



Rapeseed production 2018 (1000 t) (f'cast.)



EU rapeseed (MS)

Rapeseed

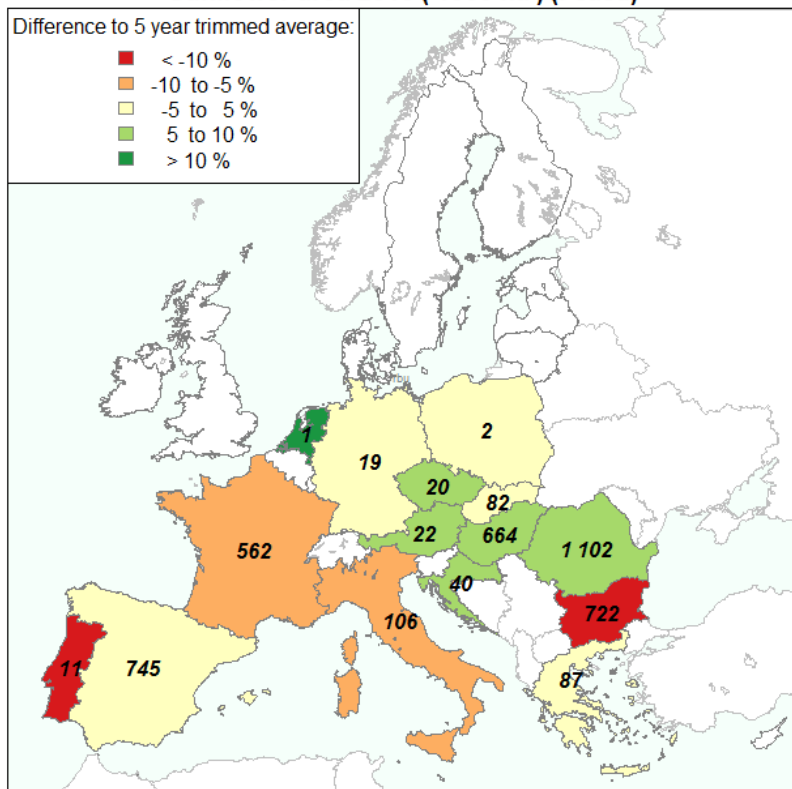
| Production Million tonnes | AVG 5 yrs trimmed | 2017/18 | 2018/19 July | 2018/19 August | %change 2017/18 | %change 5yrs trimmed |
|------------------------------|----------------------|--------------|-----------------|-------------------|--------------------|-------------------------|
| TOTAL EU | 21.59 | 21.96 | 19.67 | 19.23 | -12.4 | -10.9 |
| France | 5.14 | 5.38 | 4.60 | 4.61 | -14.2 | -10.3 |
| Germany | 5.13 | 4.28 | 3.79 | 3.68 | -14.0 | -28.3 |
| Poland | 2.69 | 2.70 | 1.95 | 1.95 | -27.7 | -27.6 |
| UK | 2.25 | 2.17 | 2.14 | 2.16 | -0.3 | -4.0 |
| Czech Republic | 1.35 | 1.15 | 1.25 | 1.25 | 9.2 | -7.5 |
| Romania | 1.09 | 1.67 | 1.63 | 1.60 | -4.1 | 47.0 |
| Others | 3.93 | 4.62 | 4.30 | 3.97 | -14.0 | 1.1 |



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EU sunflower

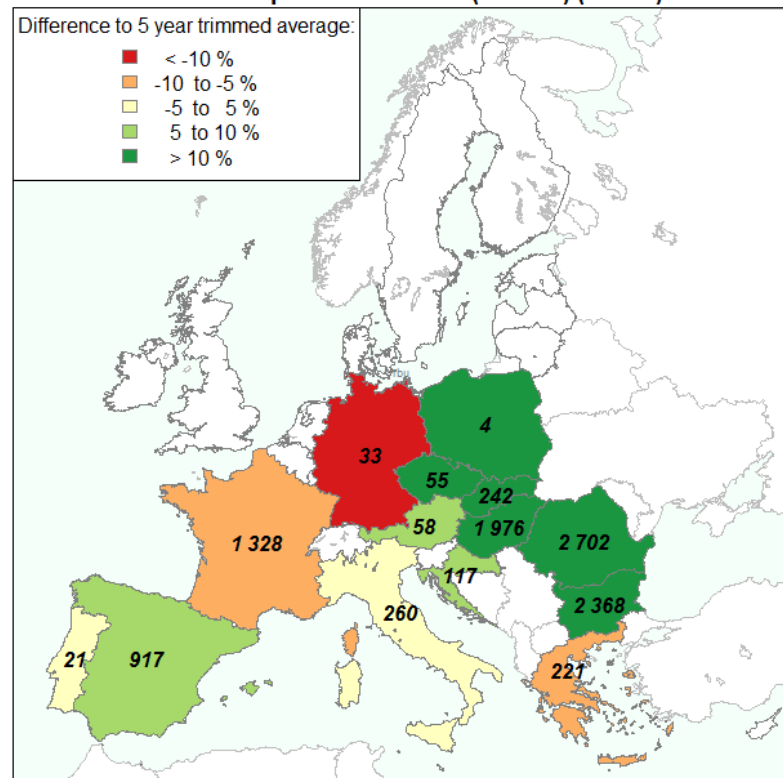
Sunflower area 2018 (1000 ha) (f'cast.)



EU28 area : 4 185 (1000 ha) Difference to 5 year trimmed average: -1 %

Calculations and cartography: European Commission DG AGRI G4 2018-08-28 © EuroGeographics for the administrative boundaries

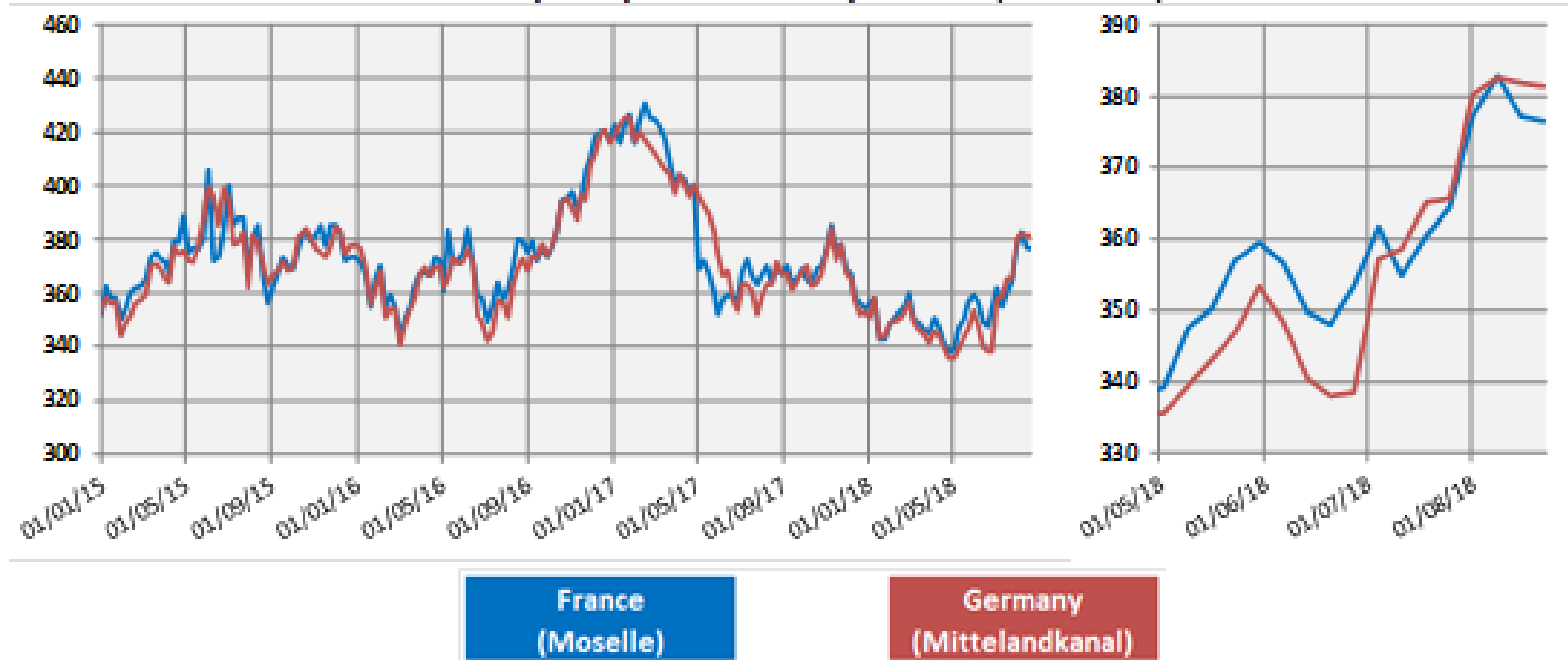
Sunflower production 2018 (1000 t) (f'cast.)



EU28 production : 10 301 (1000 t) Difference to 5 year trimmed average: 13 %

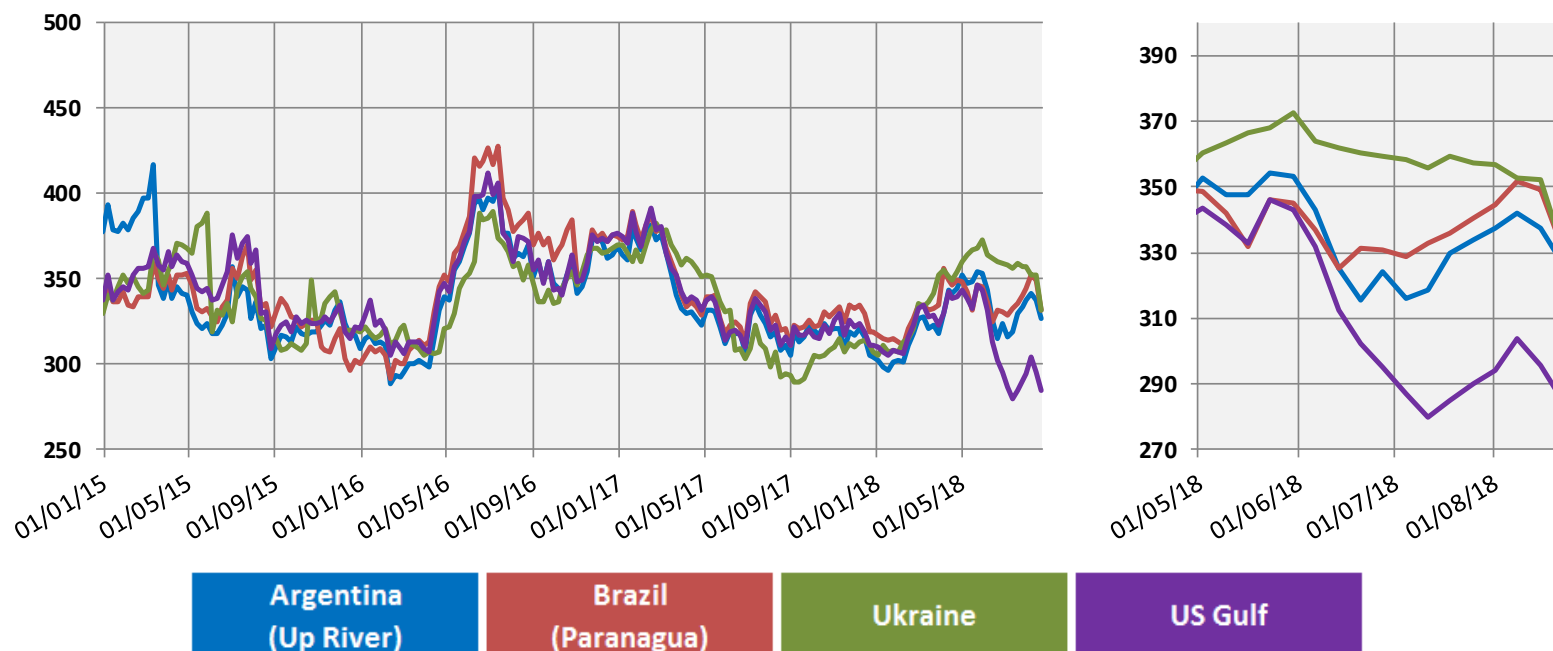
Calculations and cartography: European Commission DG AGRI G4 2018-08-28 © EuroGeographics for the administrative boundaries

EU export prices for rapeseed (€/tonne)



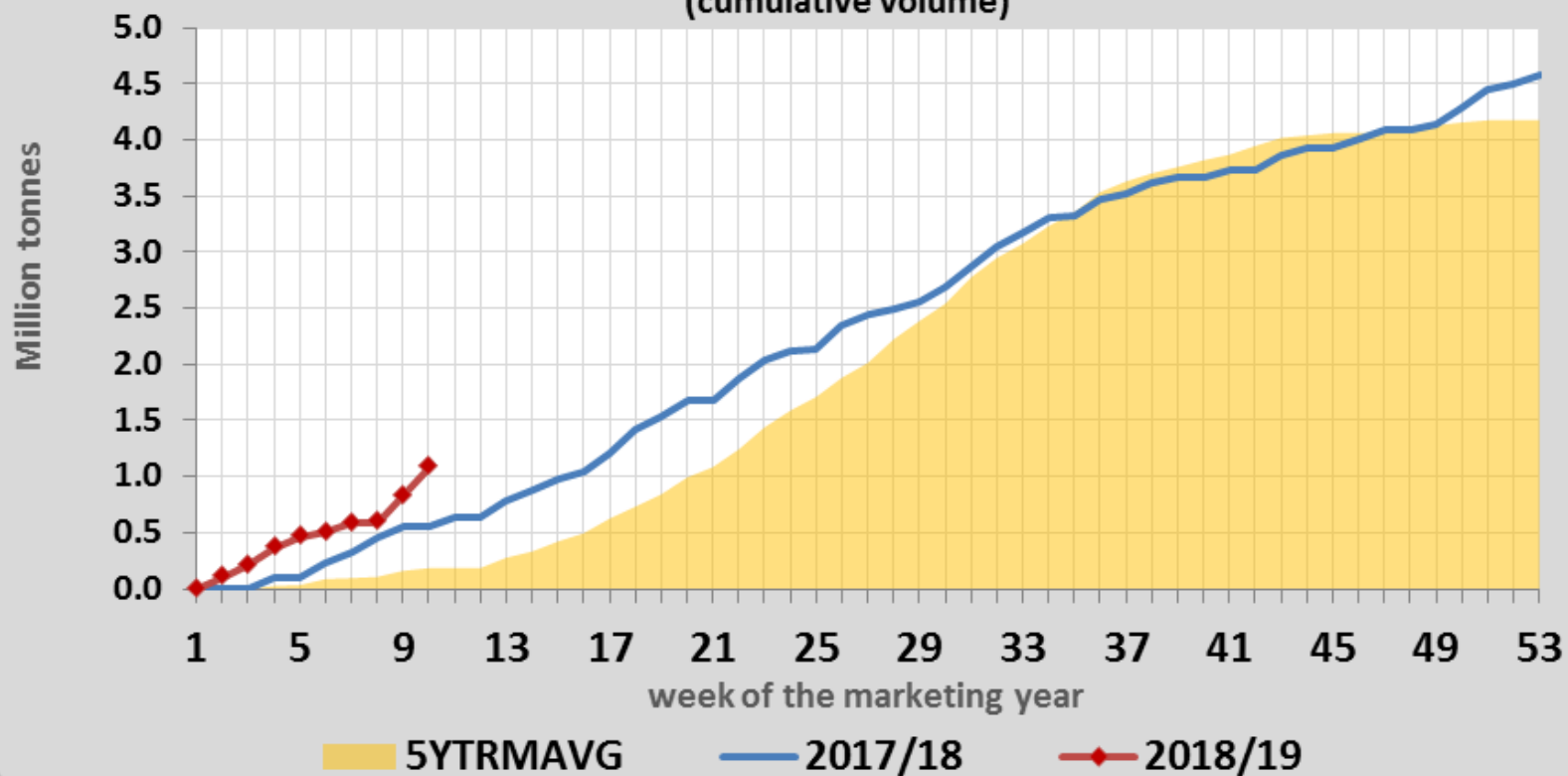
Source: International Grains Council

World export prices for soyabeans - (€/tonne)



Source: International Grains Council

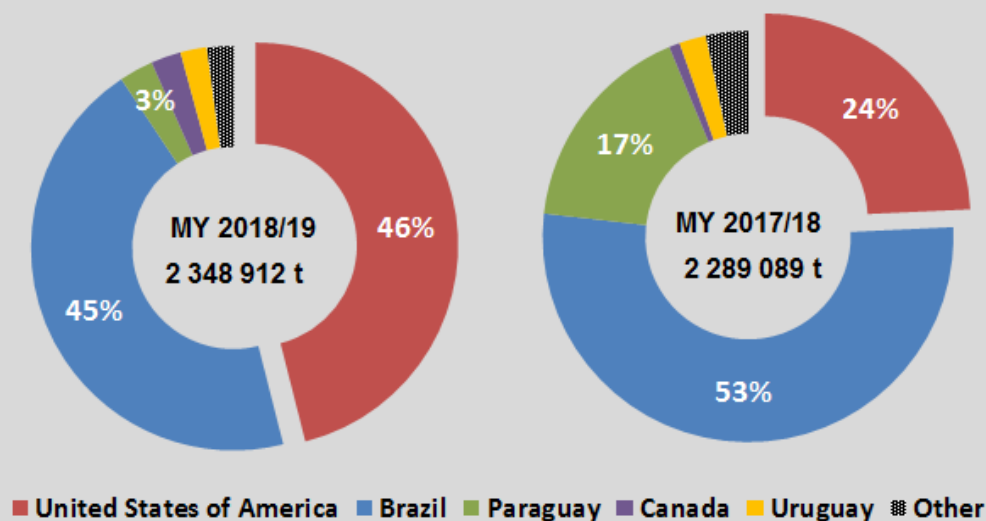
EU imports of soyabeans of United States origin (cumulative volume)





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EU imports of soyabeans - first 10 weeks of the MY



| volume in metric tonnes | | | | | | |
|---------------------------------|------------------|--------------|---------|---------------|------------------|--------------|
| Origin | MY 2018/19 | | MY / MY | | MY 2017/18 | |
| | tonnes | share | | | tonnes | share |
| United States of America | 1 081 615 | 46.0% | ↑ | +94.8% | 555 254 | 24.3% |
| Brazil | 1 047 984 | 44.6% | ↓ | -12.9% | 1 202 980 | 52.6% |
| Paraguay | 63 755 | 2.7% | ↓ | -83.5% | 387 436 | 16.9% |
| Canada | 56 334 | 2.4% | ↑ | +188.1% | 19 554 | 0.9% |
| Uruguay | 49 129 | 2.1% | ↑ | +2.4% | 47 968 | 2.1% |
| Other | 50 096 | 2.1% | ↓ | -34.0% | 75 898 | 3.3% |
| Total | 2 348 912 | | ↑ | +2.6% | 2 289 089 | |

EU 28 oilseeds balance sheet

| OILSEED | 2017/18 est | | | | 2018/19 fc | | | |
|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | Rapeseed | Soybean | Sunflower | TOTAL | Rapeseed | Soybean | Sunflower | TOTAL |
| Beginning stocks | 1 033 | 1 217 | 667 | 2 917 | 1 061 | 1 322 | 656 | 3 039 |
| Usable production | 21 956 | 2 620 | 10 355 | 34 931 | 19 227 | 2 788 | 10 301 | 32 315 |
| <i>Area (thousand ha)</i> | 6 683 | 947 | 4 224 | 11 855 | 6 781 | 927 | 4 185 | 11 893 |
| <i>Yield (tonnes/ha)</i> | 3.3 | 2.8 | 2.5 | 2.9 | 2.8 | 3.0 | 2.5 | 2.7 |
| Imports (from third countries) | 4 000 | 14 100 | 500 | 18 600 | 4 200 | 14 500 | 436 | 19 136 |
| Total supply | 26 989 | 17 937 | 11 522 | 56 448 | 24 488 | 18 610 | 11 393 | 54 490 |
| Domestic use | 25 793 | 16 315 | 10 266 | 52 374 | 23 107 | 17 160 | 10 226 | 50 493 |
| <i>of which crushing</i> | 24 968 | 14 554 | 9 037 | 48 558 | 22 368 | 15 308 | 9 001 | 46 677 |
| Exports (to third countries) | 135 | 300 | 600 | 1 035 | 316 | 153 | 526 | 996 |
| Total use | 25 928 | 16 615 | 10 866 | 53 409 | 23 423 | 17 313 | 10 752 | 51 489 |
| Ending stocks | 1 061 | 1 322 | 656 | 3 039 | 1 065 | 1 296 | 641 | 3 002 |
| Change in stocks | 28 | 106 | -11 | 122 | 4 | -26 | -15 | -37 |



Proteins

EU Protein crops

EU PROTEIN CROPS AREA

| Million ha | AVG 5 yrs trimmed | 2017/18 | 2018/19 July | 2018/19 August | %change 2017/18 | %change 5yrs trimmed |
|--------------|----------------------|------------|-----------------|-------------------|--------------------|-------------------------|
| Field peas | 0.7 | 1.0 | 0.98 | 0.91 | -11.0 | 24.4 |
| Broad beans | 0.6 | 0.7 | 0.64 | 0.66 | -6.7 | 18.0 |
| Sweet lupins | 0.2 | 0.2 | 0.21 | 0.21 | 10.2 | 28.1 |
| TOTAL | 1.4 | 1.9 | 1.84 | 1.77 | -7.3 | 22.3 |

Sources : EC - DG AGRI

EU PROTEIN CROPS PRODUCTION

| Million tonnes | AVG 5 yrs trimmed | 2017/18 | 2018/19 July | 2018/19 August | %change 2017/18 | %change 5yrs trimmed |
|----------------|----------------------|------------|-----------------|-------------------|--------------------|-------------------------|
| Field peas | 1.9 | 2.7 | 2.7 | 2.5 | -8.8 | 29.8 |
| Broad beans | 1.7 | 2.2 | 2.1 | 2.1 | -1.2 | 25.5 |
| Sweet lupins | 0.3 | 0.3 | 0.4 | 0.4 | 15.0 | 31.8 |
| TOTAL | 3.9 | 5.2 | 5.2 | 5.0 | -4.2 | 28.1 |

Sources : EC - DG AGRI



Drought : Commission actions

Greening derogations:

- 14/08: adoption of decisions allowing EFA fallow land to be used for production of fodder
- 30/08: discussion with MS of a second decision (1) allowing grass crops on EFA catch crop area for fodder purpose and (2) shortening of period to allow sowing of winter crop

Used by:

Belgium, Estonia, Denmark, Ireland,
Germany, Finland, France, Latvia, Lithuania,
Netherlands, Poland, Portugal, Sweden

Advances:

- 30/08: discussion with MS of decisions
- Will allow to pay 70% of direct payments and 85% of rural development support
- In October instead of December

Used by:

- Belgium, the Czech Republic, Ireland, Greece, France, Latvia, Lithuania, Hungary, Croatia, Poland, Portugal in relation to the Azores, Romania, Finland, Sweden and the United Kingdom in relation to the Northern Ireland



Thank you for your attention!

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