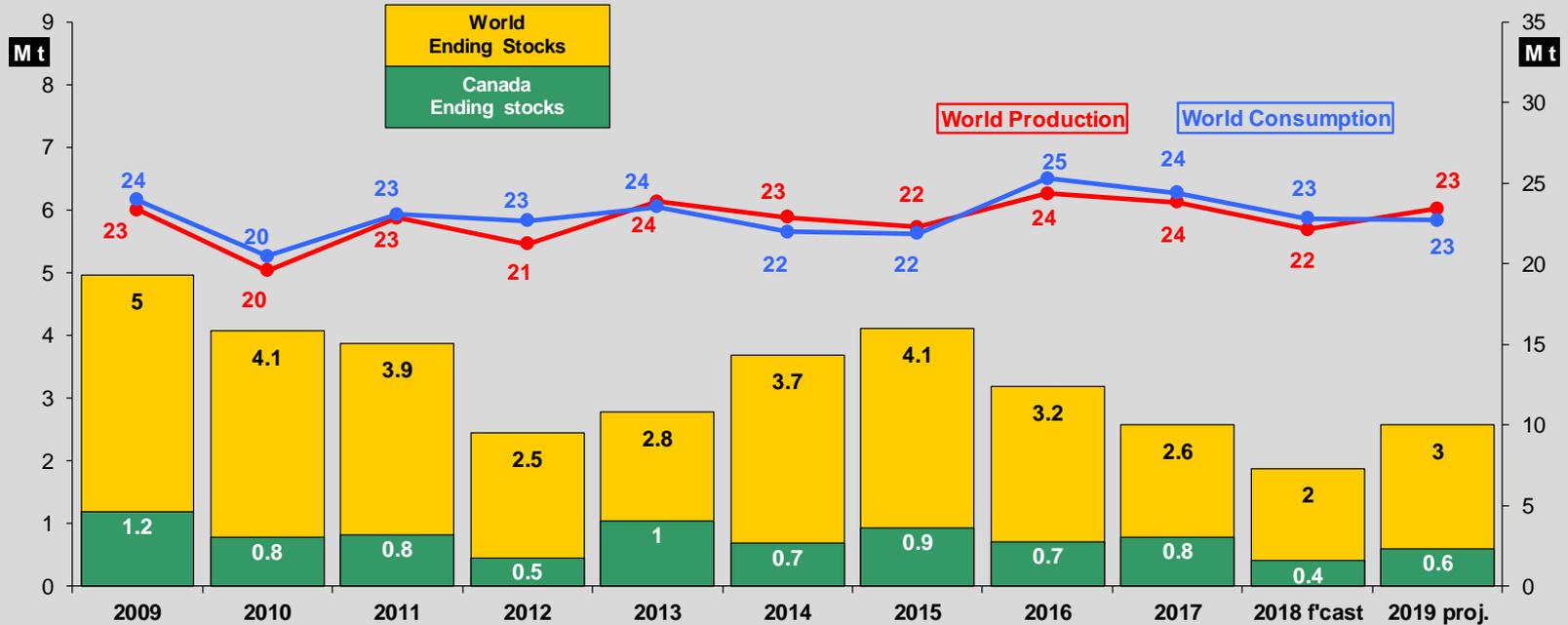




# Focus on the Oat Market

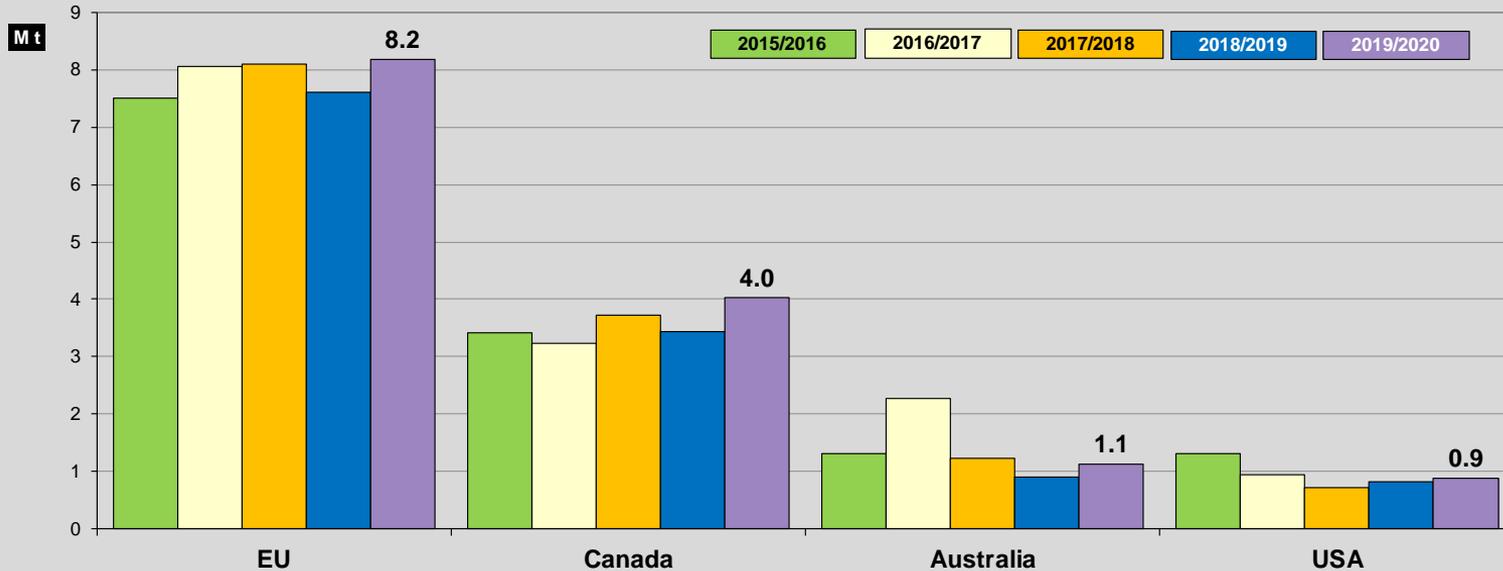
**CROPS Market Observatory**  
**30 September 2019**

# IGC: world oats



Source: IGC September report

# IGC: oats production forecast



Source: IGC September report



# World oats production

(International Grains Council GMR 503 of 26/9/2019)

## *Oats production in selected countries (million tonnes)*

	14/15	15/16	16/17	17/18 <i>(estimate)</i>	18/19 <i>(forecast)</i>	19/20 <i>(projection)</i>	<i>y/y change</i>	As of total <i>(19/20)</i>
<b>EU-28</b>	7.91	7.51	8.05	8.11	7.61	<b>8.18</b>	+7.5%	<b>34.9%</b>
Russia	5.27	4.54	4.76	5.46	4.72	<b>4.30</b>	-8.9%	<b>18.4%</b>
Ukraine	0.61	0.49	0.51	0.48	0.43	<b>0.43</b>	+0.0%	<b>1.8%</b>
Australia	1.20	1.30	2.27	1.23	0.89	<b>1.13</b>	+27.0%	<b>4.8%</b>
Canada	2.98	3.43	3.23	3.73	3.44	<b>4.02</b>	+16.9%	<b>17.2%</b>
US	1.02	1.30	0.94	0.72	0.81	<b>0.88</b>	+8.6%	<b>3.8%</b>
<b>World</b>	<b>22.90</b>	<b>22.28</b>	<b>24.37</b>	<b>23.81</b>	<b>22.12</b>	<b>23.42</b>	<b>+5.9%</b>	<b>100%</b>



# Oats Consumption

(source: IGC; million tonnes)

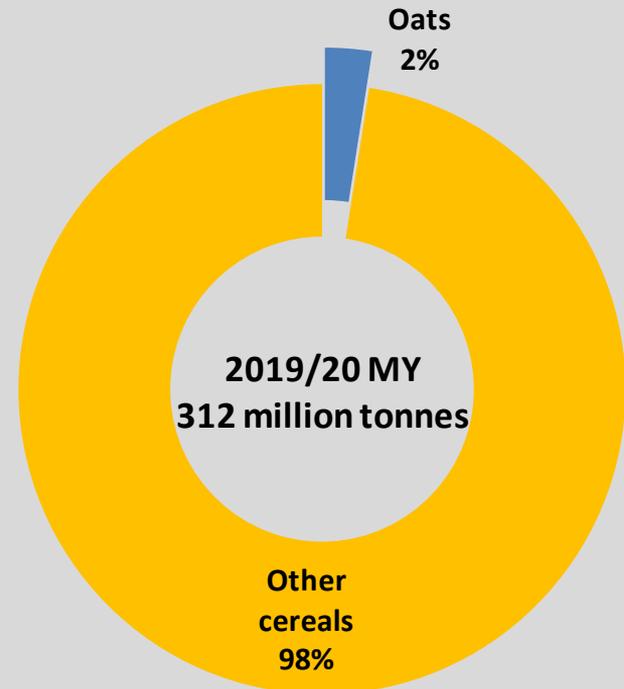
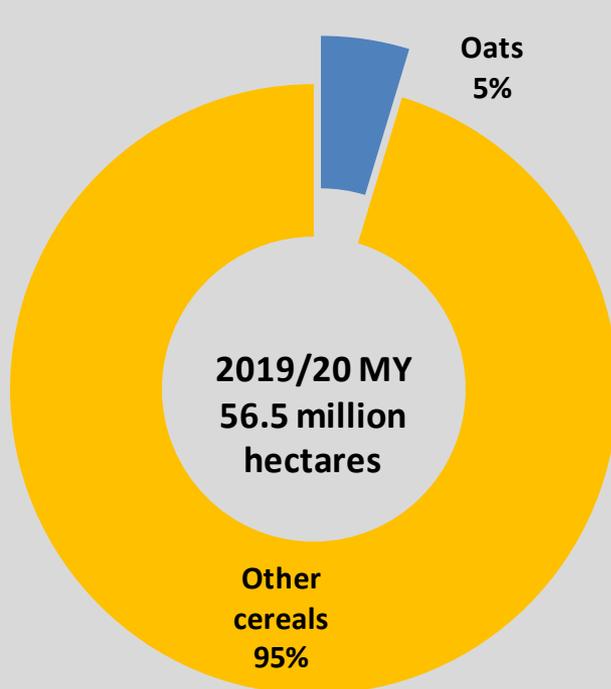
		2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	AVE
<b>EU-28</b>	Feed use	6,42	4,91	5,22	7,37	6,20	5,87	5,69	5,95
	Food use	1,19	1,14	1,18	1,18	1,16	1,15	1,16	1,17
	Total use	8,29	6,85	7,03	9,08	8,06	7,72	7,54	7,80
	Share of food use	14%	17%	17%	13%	14%	15%	15%	15%
<b>CAN</b>	Feed use	0,94	0,90	0,68	0,94	1,09	1,08	1,10	0,96
	Food use	0,16	0,07	0,19	0,13	0,11	0,13	0,13	0,13
	Total use	1,16	1,03	0,96	1,18	1,30	1,32	1,33	1,18
	Share of food use	14%	7%	20%	11%	8%	10%	10%	11%
<b>RUS</b>	Feed use	3,41	3,71	3,37	3,34	3,80	3,17	2,63	3,35
	Food use	0,67	0,95	0,75	0,82	1,02	1,01	1,02	0,89
	Total use	4,95	5,34	4,62	4,69	5,37	4,68	4,20	4,84
	Share of food use	14%	18%	16%	17%	19%	22%	24%	18%
<b>US</b>	Feed use	1,66	1,35	1,58	1,43	1,20	1,22	1,43	1,41
	Food use	1,09	0,96	1,10	1,10	1,05	1,06	1,08	1,06
	Total use	2,75	2,40	2,77	2,63	2,34	2,34	2,59	2,55
	Share of food use	40%	40%	40%	42%	45%	45%	42%	42%
<b>WORLD</b>	Feed use	16,46	14,81	14,66	18,14	16,89	15,47	15,05	15,93
	Food use	4,57	4,63	4,80	4,79	4,90	5,09	5,12	4,84
	Total use	23,52	21,99	21,86	25,30	24,41	22,82	22,72	23,23
	Share of food use	19%	21%	22%	19%	20%	22%	23%	21%

# World oats exports (thousand tonnes)

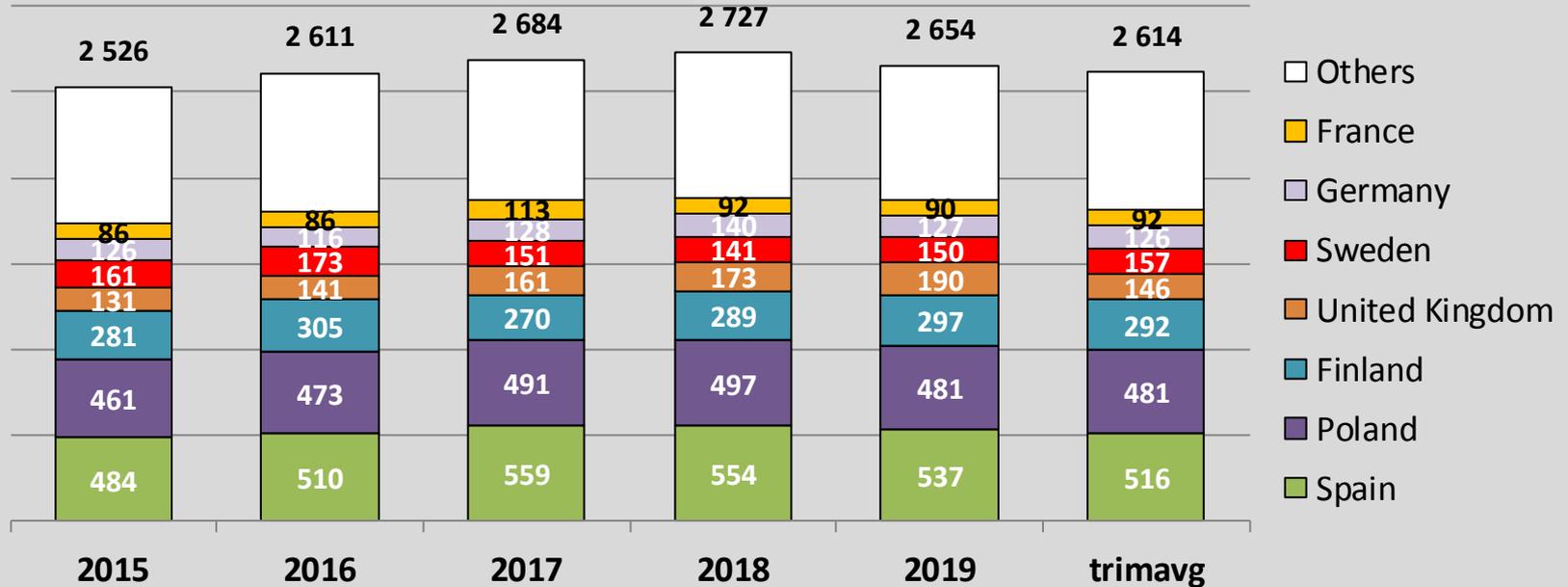


Source: IGC

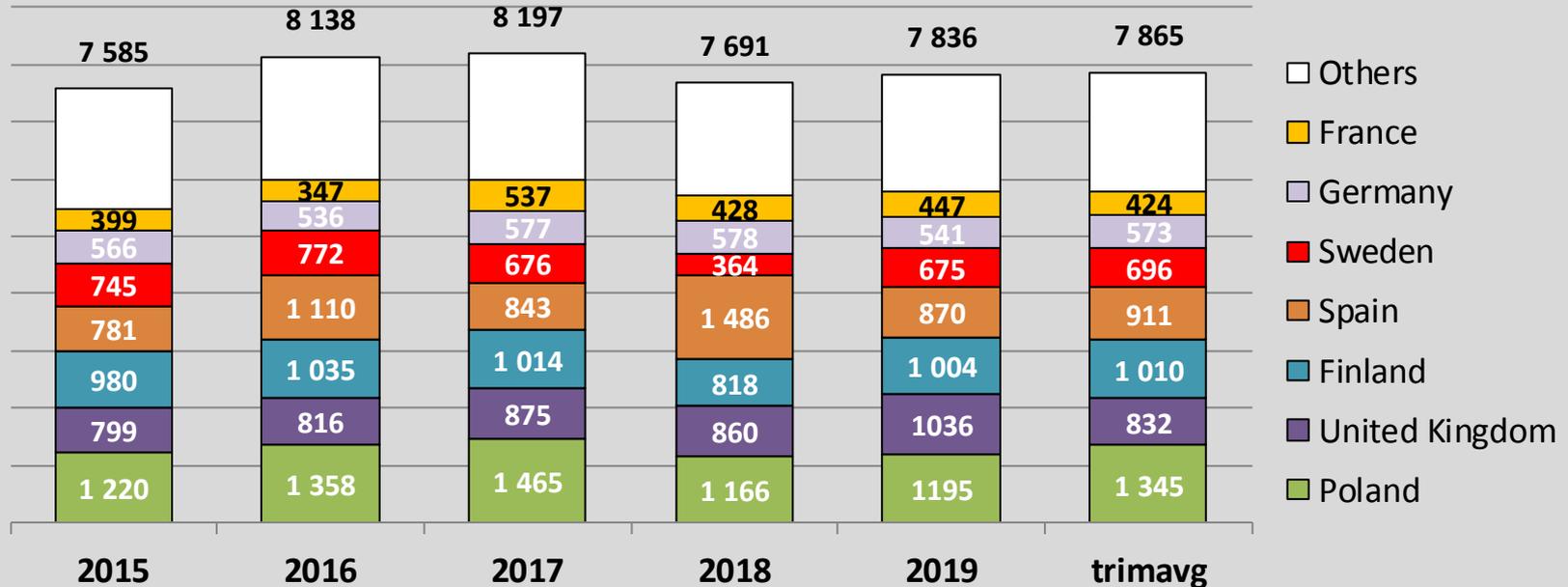
# Share of oats on total EU cereals crops



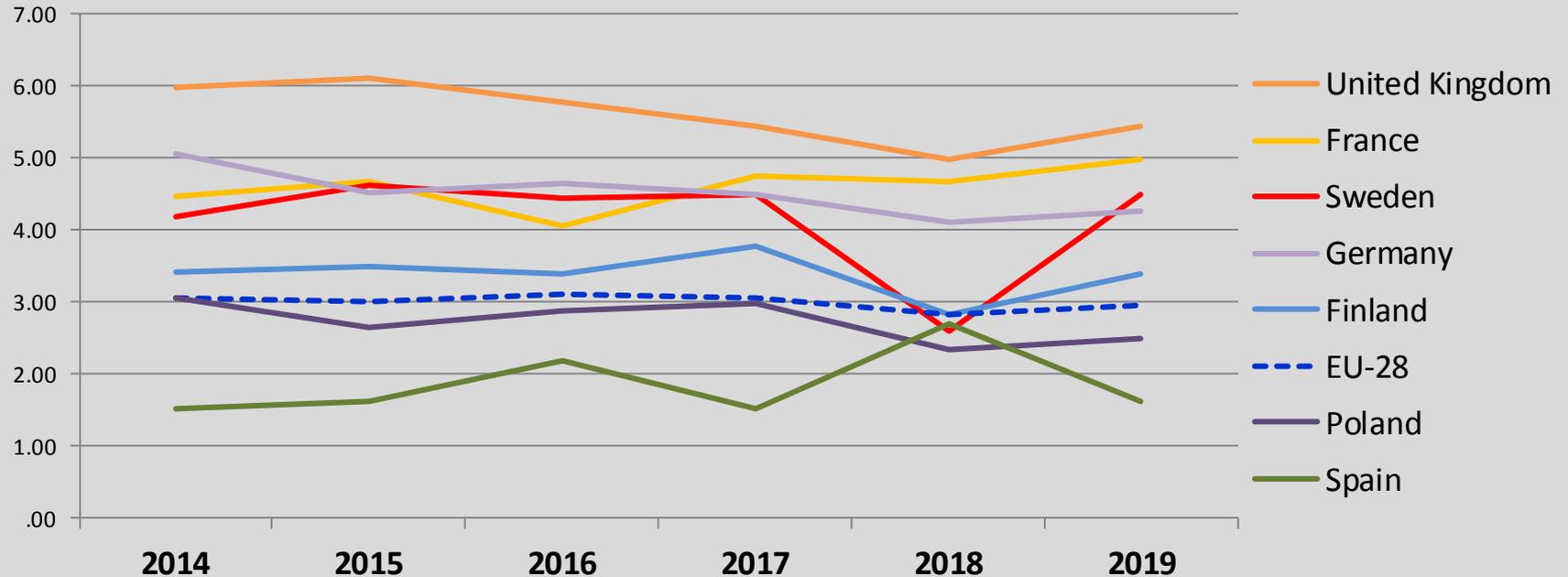
# EU Area (thousand hectares)



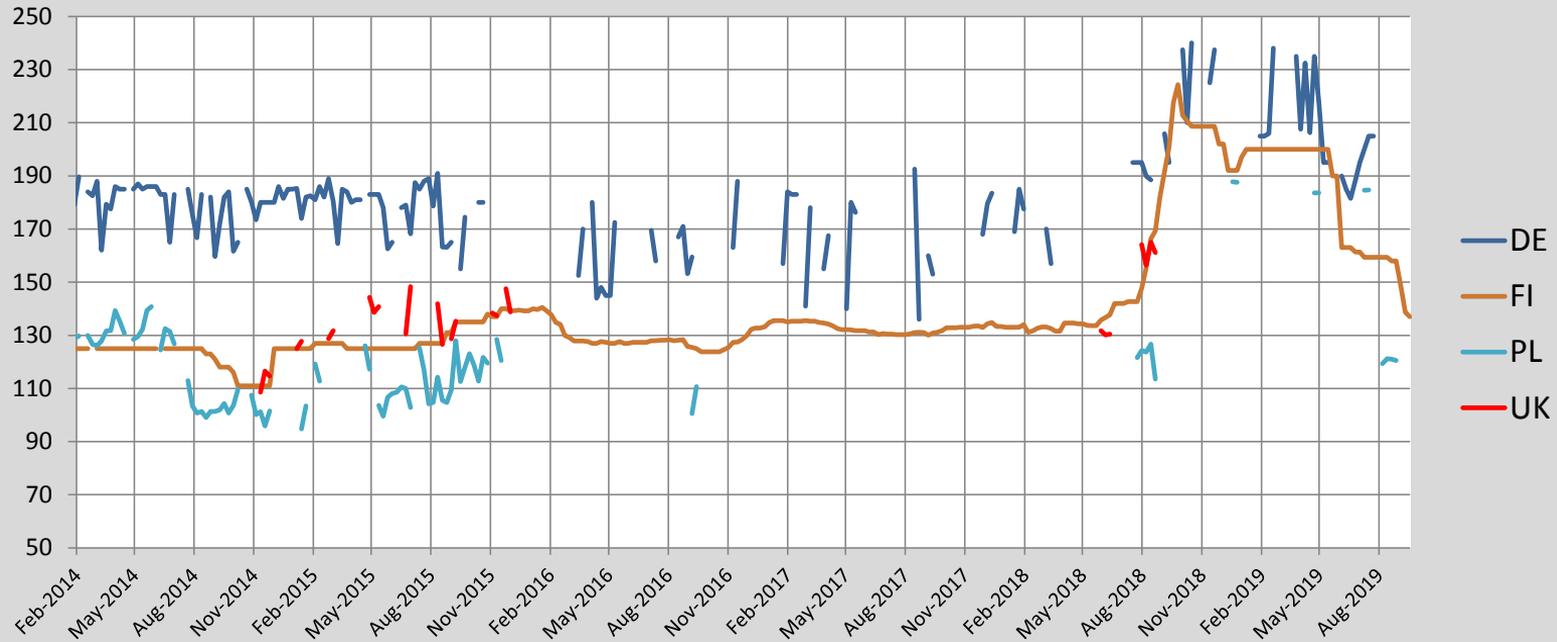
# EU production (thousand tonnes)



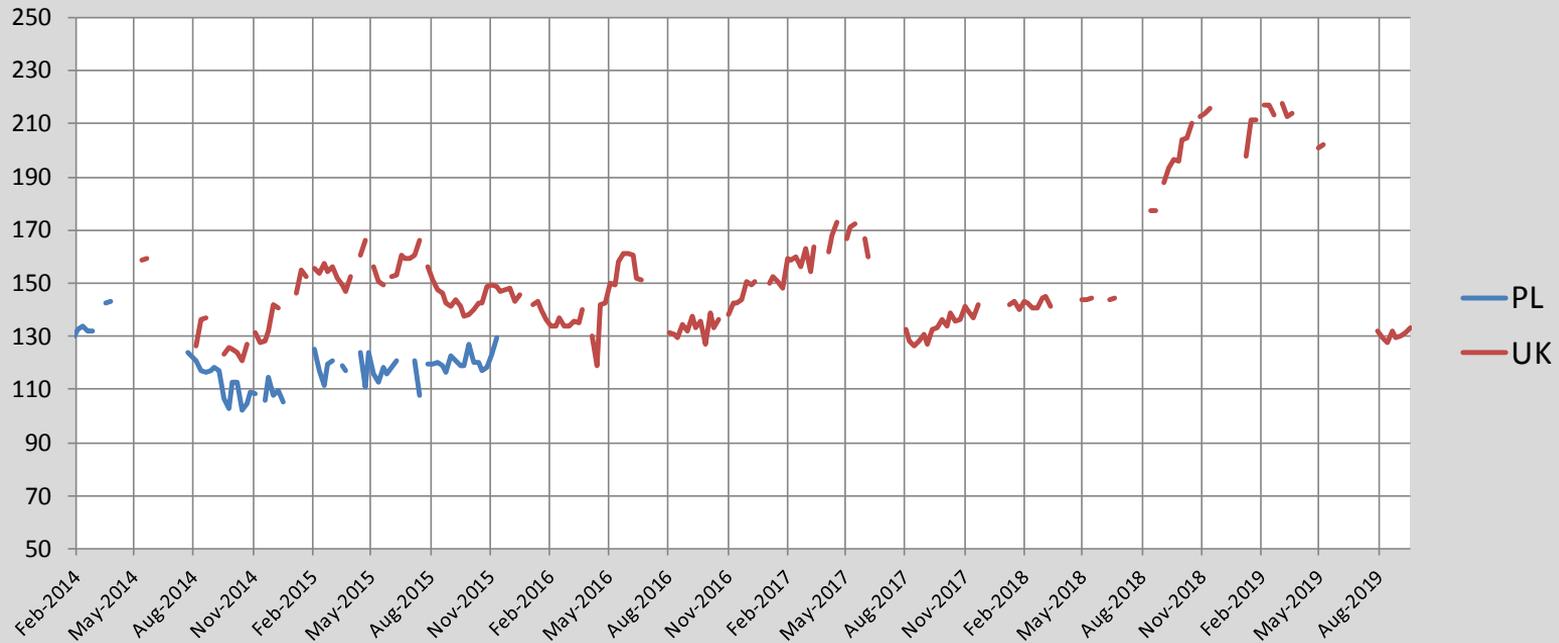
# EU yield (tonnes/hectares)



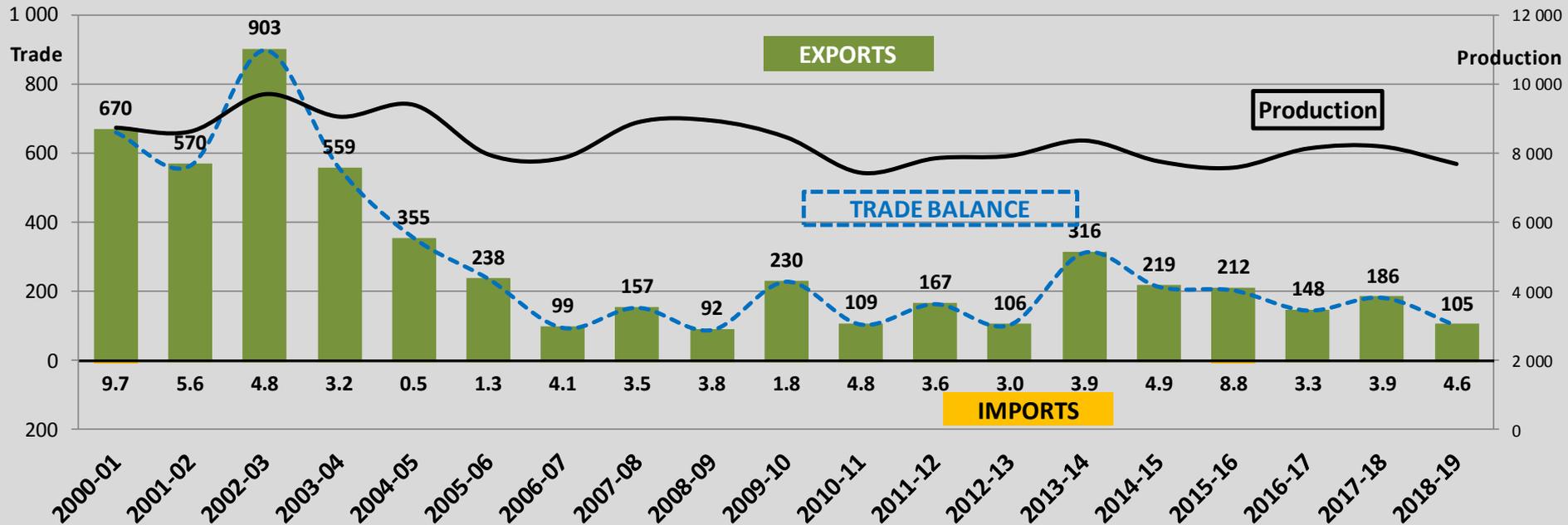
# EU feed oats prices (€/tonne)



# EU milling oats prices (€/tonne)

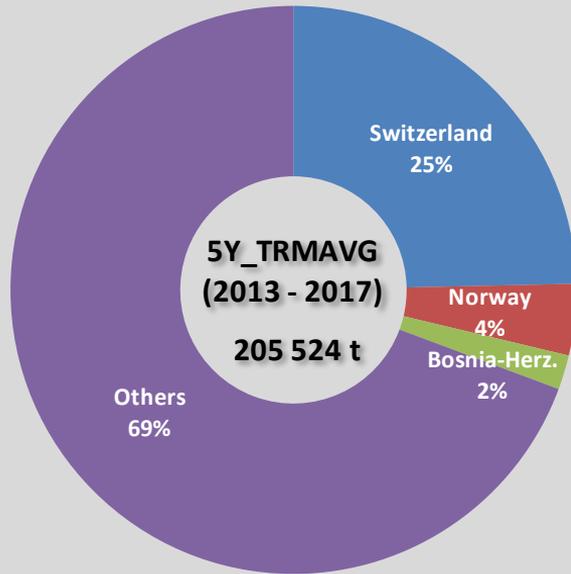


# EU-28 trade evolution (thousand tonnes)

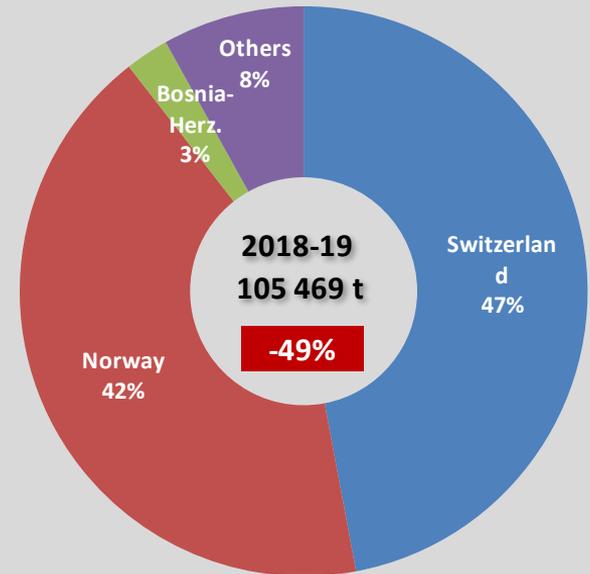


Source: Eurostat - Comext (data extradtion at 26/09/2019)

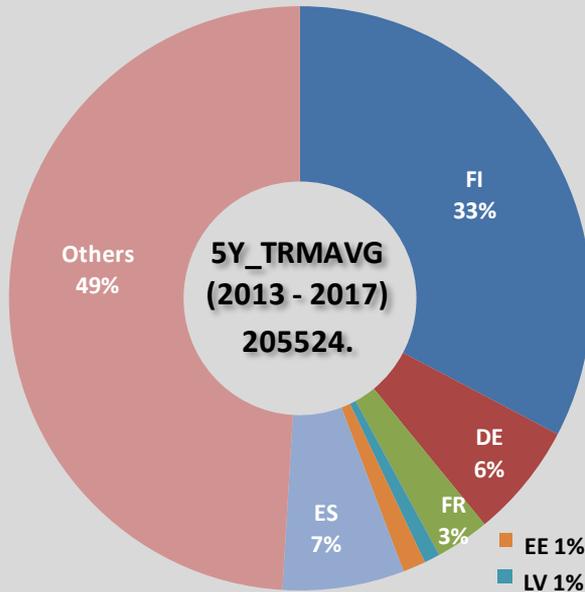
## EU oats export destinations (July - June)



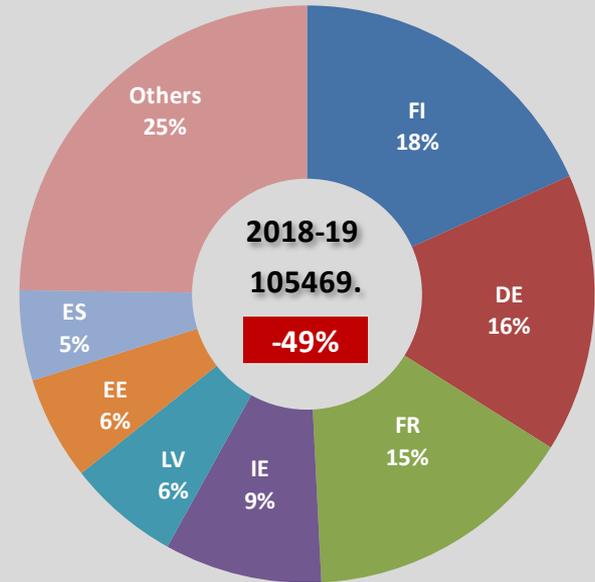
(Tonnes)	5Y_TRMAVG (2013 - 2017)	2018-19	
Switzerland	50 674	49 616	↓ -2%
Norway	8 338	44 726	↑ 436%
Bosnia-Herz.	4 038	2 611	↓ -35%
Others	142 475	8 516	↓ -94%



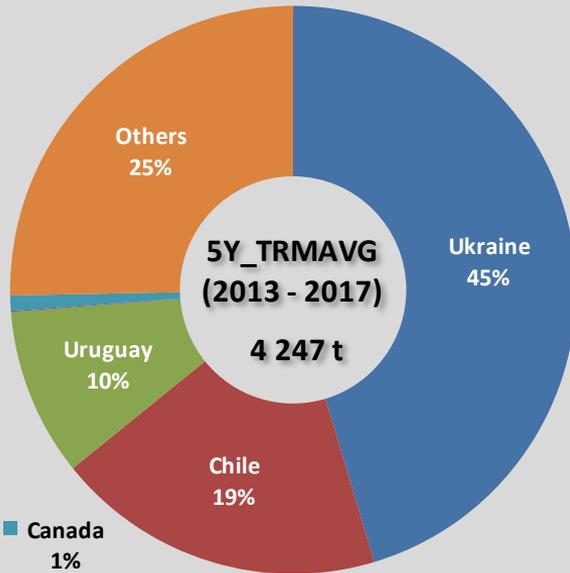
## EU MS exporting oats (July - June)



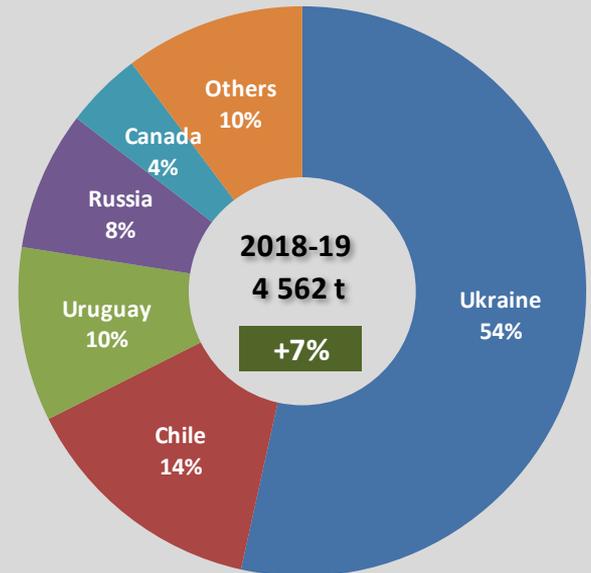
(Tonnes)	5Y_TRMAVG (2013 - 2017)	2018-19	
FI	67 212	19 286 ↓	-71%
DE	13 086	16 474 ↑	26%
FR	6 146	16 137 ↑	163%
IE	16	9 342 ↑	
LV	1 792	6 636 ↑	270%
EE	2 603	6 129 ↑	135%
ES	13 884	5 333 ↓	-62%
Others	100 785	26 132 ↓	-74%



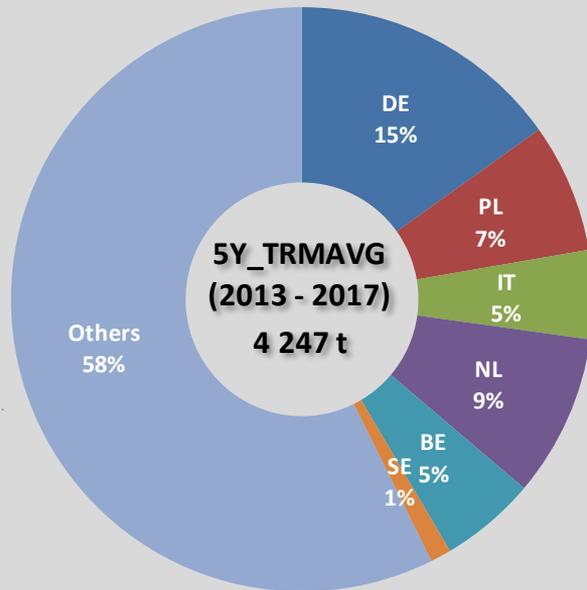
## EU oats import origins (July - June)



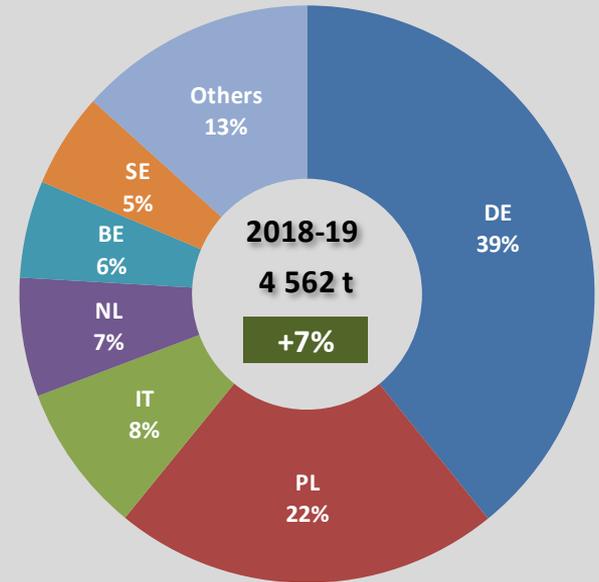
(Tonnes)	5Y_TRMAVG (2013 - 2017)	2018-19	
Ukraine	1 927	2 439	↑ 27%
Chile	799	645	↓ -19%
Uruguay	406	451	↑ 11%
Russia	3	360	↑ 13244%
Canada	37	199	↑ 444%
Others	1 075	468	↓ -56%



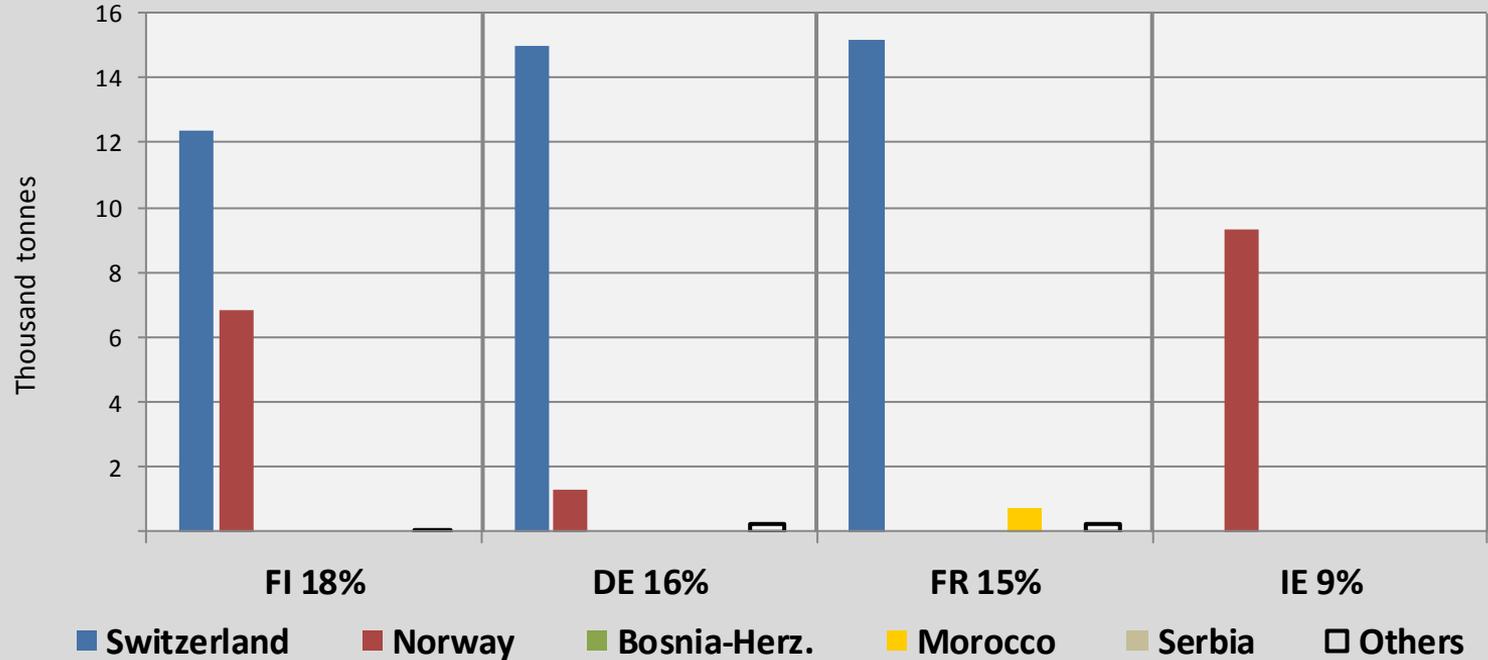
## EU MS importing oats (July - June)



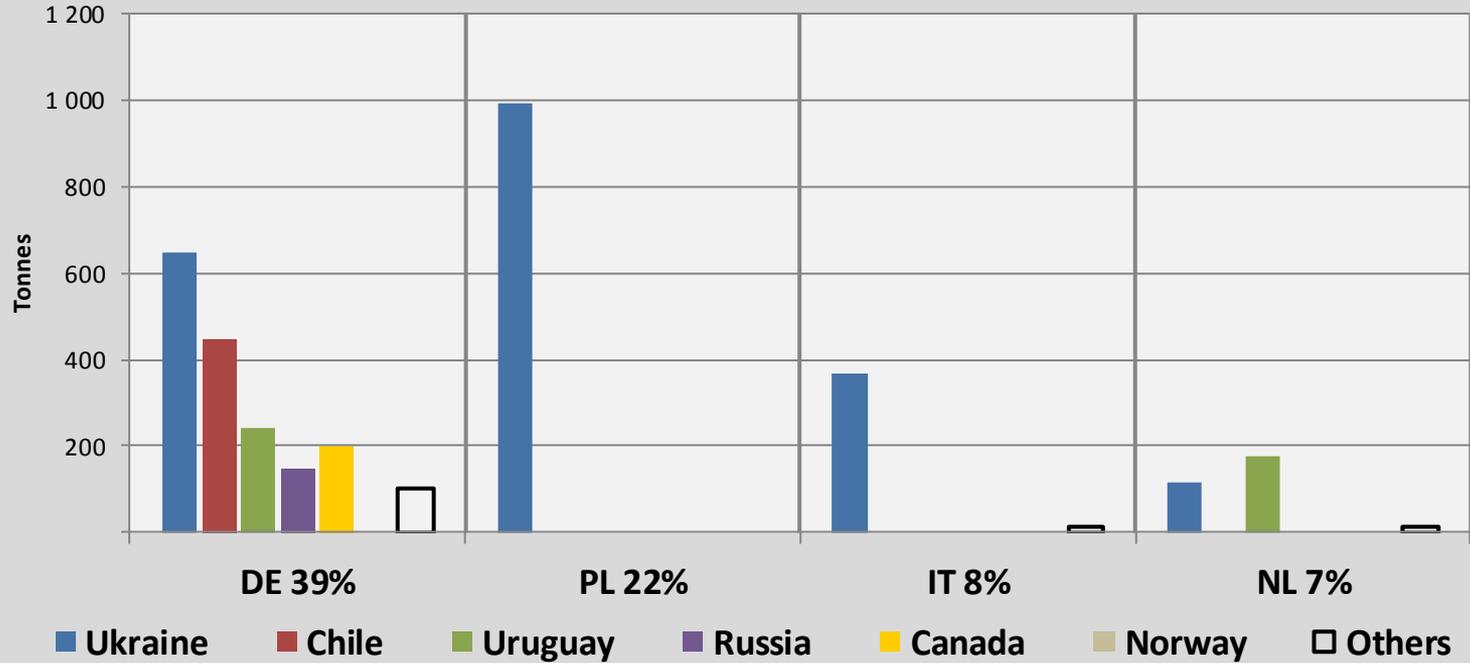
(Tonnes)	5Y_TRMAVG (2013 - 2017)	2018-19	
DE	643	1 787 ↑	178%
PL	303	992 ↑	227%
IT	209	381 ↑	83%
NL	382	304 ↓	-
BE	226	248 ↑	10%
SE	49	242 ↑	393%
Others	2 435	609 ↓	-75%



## Oats export of MY 2018/19 : 105 469 t



## Oats import of MY 2018/19 : 4 563 t



# EU cereals balance sheet

Thousand metric tonnes

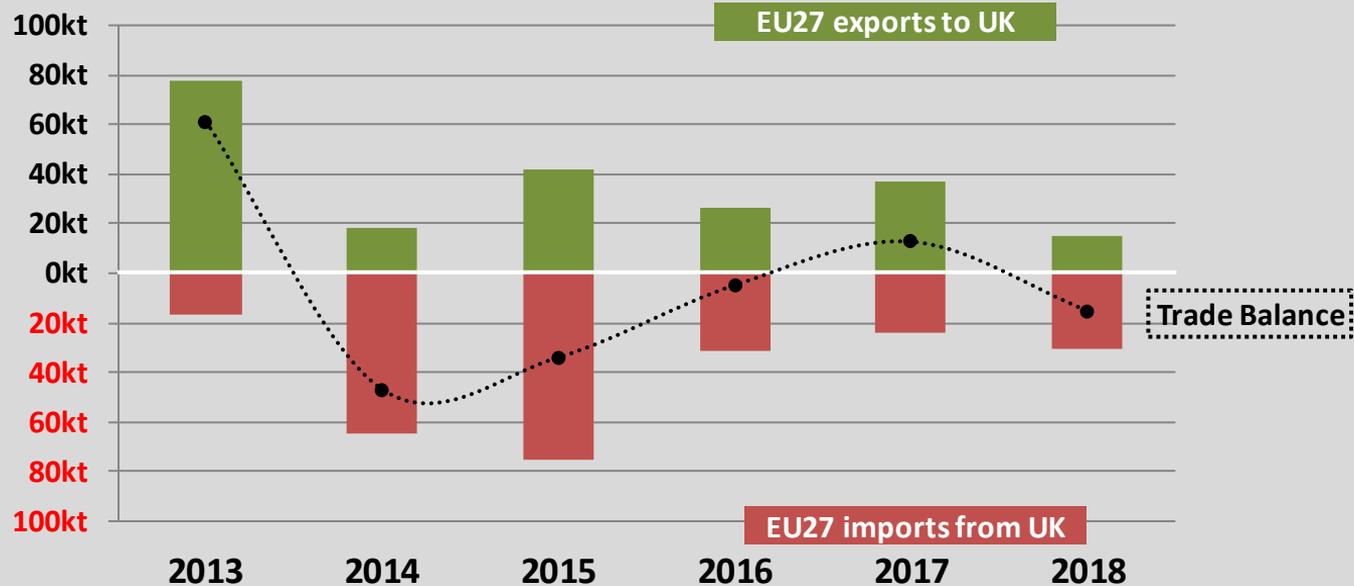
LAST UPDATED: 26/09/2019	2019/20 (forecast)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
<b>Beginning stocks</b>	<b>12 198</b>	<b>5 240</b>	<b>2 287</b>	<b>24 924</b>	<b>205</b>	<b>654</b>	<b>158</b>	<b>1 216</b>	<b>50</b>	<b>46 931</b>
Usable production	145 003	61 396	7 820	66 460	8 233	934	7 750	10 810	3 920	312 327
<i>Area (thousand ha)</i>	<i>23 923</i>	<i>12 246</i>	<i>2 325</i>	<i>8 824</i>	<i>2 210</i>	<i>188</i>	<i>2 654</i>	<i>2 740</i>	<i>1 379</i>	<i>56 490</i>
<i>Yield (tonnes/ha)</i>	<i>6.1</i>	<i>5.0</i>	<i>3.4</i>	<i>7.5</i>	<i>3.7</i>	<i>5.0</i>	<i>2.9</i>	<i>3.9</i>	<i>2.8</i>	<i>5.5</i>
Imports (from third countries)	3 379	500	2 000	17 000	80	259	4		154	23 376
<b>Total supply</b>	<b>160 579</b>	<b>67 135</b>	<b>12 107</b>	<b>108 384</b>	<b>8 518</b>	<b>1 847</b>	<b>7 912</b>	<b>12 027</b>	<b>4 124</b>	<b>382 633</b>
Total domestic use	118 144	50 287	9 438	83 417	6 904	746	7 469	9 930	3 644	289 979
Human consumption	48 147	363	8 071	4 881	3 069	156	1 152	52	23	65 913
Seed	4 897	2 167	432	429	455	40	445	539	279	9 683
Industrial uses	11 600	9 156	95	12 507	1 311		103	449	202	35 423
<i>of which bioethanol/biofuel</i>	<i>5 000</i>	<i>437</i>		<i>6 800</i>	<i>700</i>			<i>344</i>	<i>14</i>	<i>13 295</i>
Animal feed	52 600	38 200	800	65 000	2 000	550	5 700	8 800	3 100	176 750
Losses	900	400	40	600	70		70	90	40	2 210
Exports (to third countries)	25 534	8 824	900	3 085	154	4	187	2	8	38 699
<b>Total use</b>	<b>143 678</b>	<b>59 111</b>	<b>10 338</b>	<b>86 502</b>	<b>7 059</b>	<b>750</b>	<b>7 656</b>	<b>9 932</b>	<b>3 653</b>	<b>328 678</b>
<b>Ending stocks**</b>	<b>16 901</b>	<b>8 024</b>	<b>1 769</b>	<b>21 882</b>	<b>1 460</b>	<b>1 097</b>	<b>256</b>	<b>2 095</b>	<b>472</b>	<b>53 955</b>
<b>Change in stocks**</b>	<b>4 704</b>	<b>2 785</b>	<b>-518</b>	<b>-3 041</b>	<b>1 255</b>	<b>443</b>	<b>98</b>	<b>879</b>	<b>422</b>	<b>7 024</b>

\* Marketing year: from July to June

\*\* At the end of the marketing year

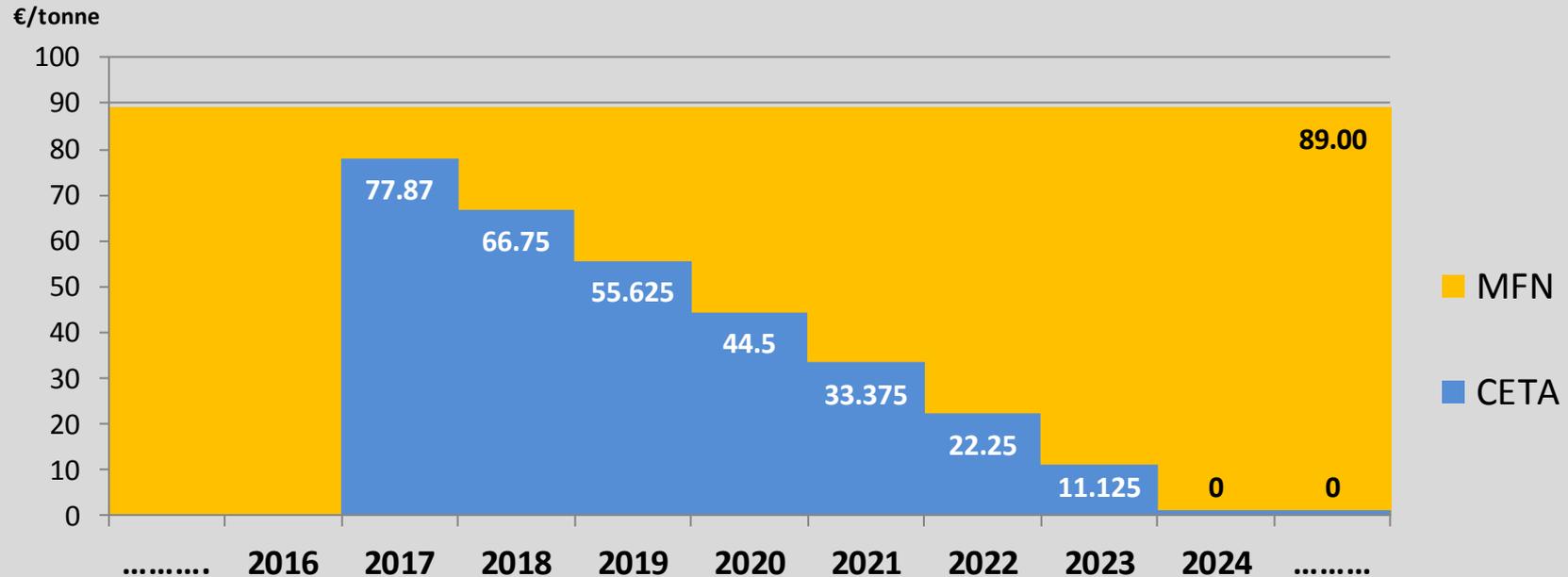
# Oats - Brexit implications

EU27 / UK trade - Oat



# CETA – oats import duty

(MFN duty of 89 €/tonne)





**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)**