

Civil Dialogue Group RICE

28 June 2019

EU RICE MARKET

**Jeroen Smits
European Commission
DG AGRI**





CONTENTS

1. International Rice Market

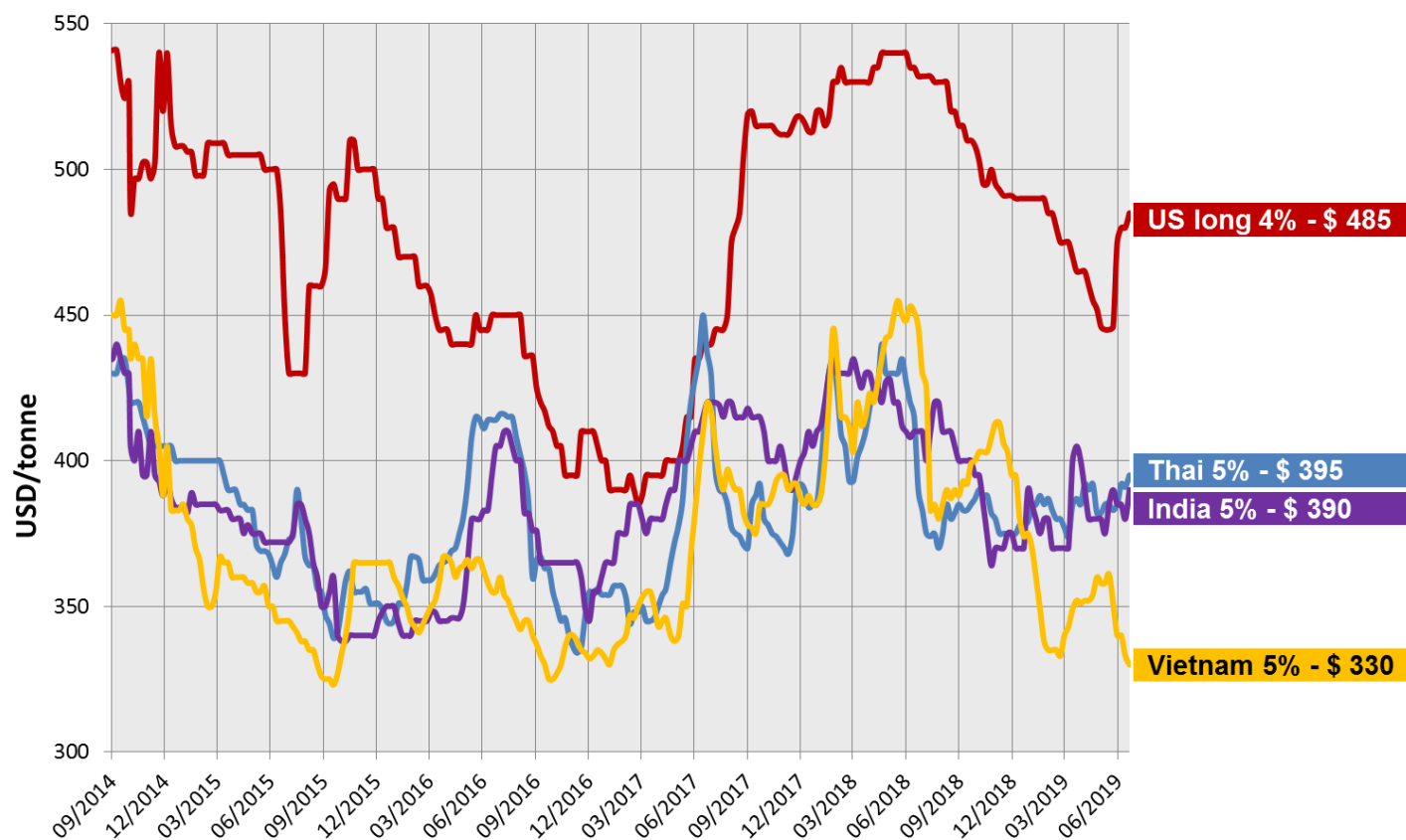
2. EU Rice Trade

3. EU Rice Market

2018/19 Rice World Market (source: AMIS Market Monitor June 2019)

Rice	FAO-AMIS			USDA		IGC	
	2018/19 est	2019/20 f'cast		2018/19 est	2019/20 f'cast	2018/19 est	2019/20 f'cast
		9 May	6 Jun		10 May		30 May
Prod	516.8	516.8	516.7	499.9	498.4	499.8	504.0
	371.5	373.3	373.2	351.4	352.4	351.3	356.6
Supply	690.8	697.3	697.3	662.0	668.3	650.1	661.9
	440.4	447.4	447.4	404.5	407.3	411.2	419.0
Utiliz.	510.8	518.5	518.2	492.0	496.1	492.3	498.9
	364.9	371.2	370.9	347.7	351.1	347.4	352.9
Trade	46.6	48.9	48.8	46.7	47.6	46.1	47.8
	42.0	44.5	44.4	40.2	41.0	42.0	43.8
Stocks	180.6	178.7	179.1	169.9	172.2	157.8	162.9
	74.1	74.7	75.1	54.9	55.2	59.7	62.1

International Rice Prices



Source: Live Rice Index



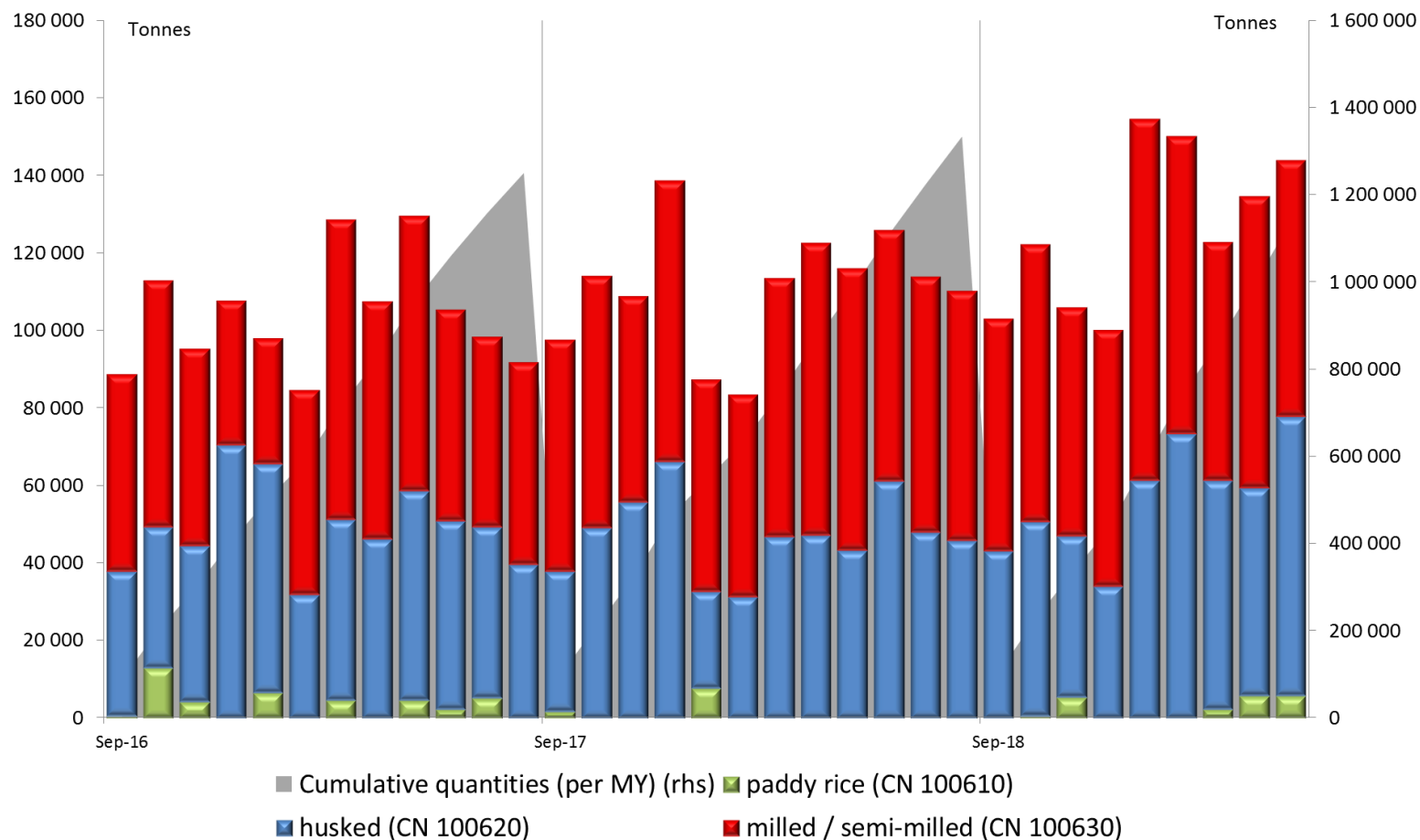
CONTENTS

1. International Rice Market

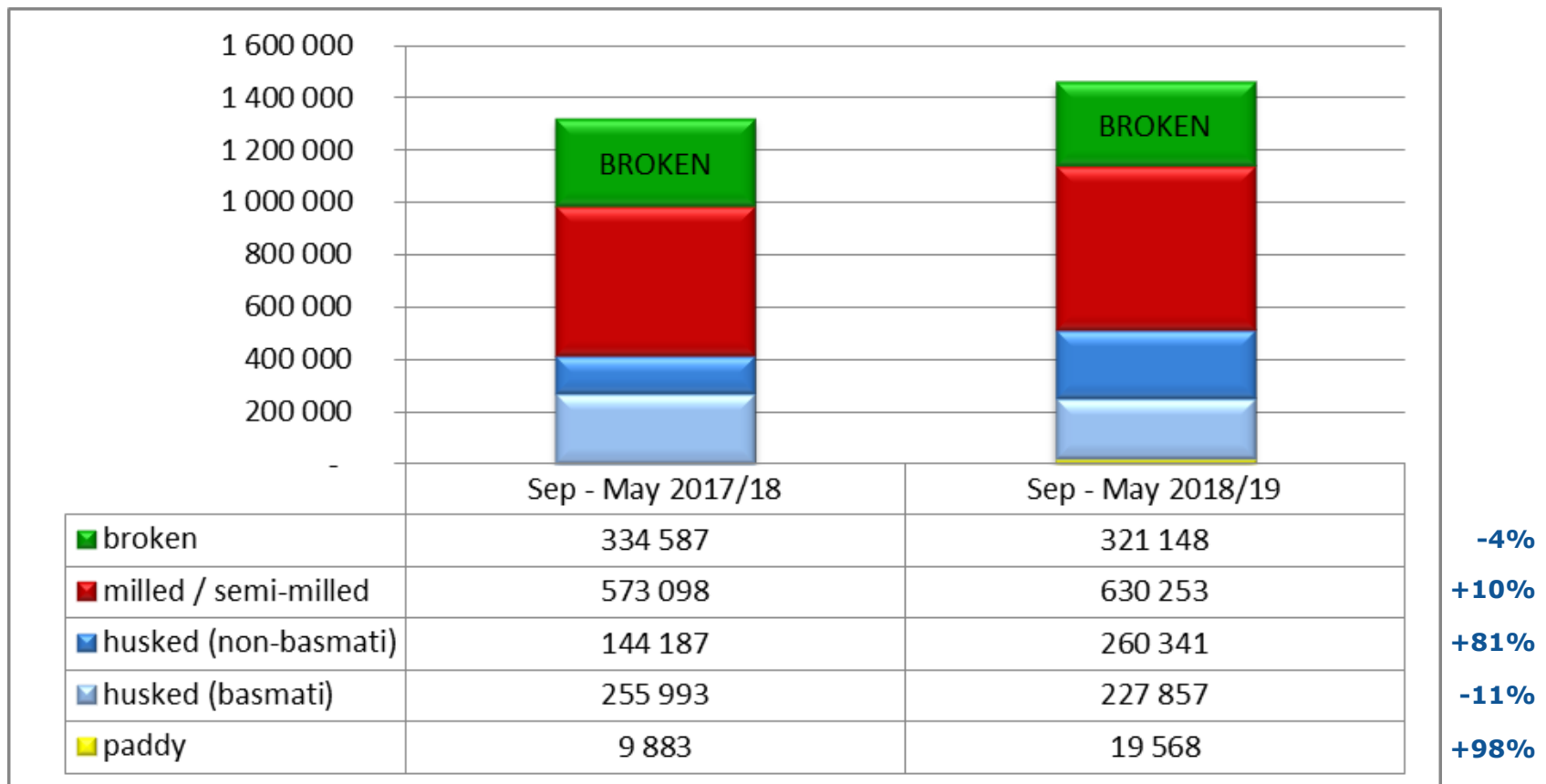
2. EU Rice Trade

3. EU Rice Market

Total EU Rice Imports per category

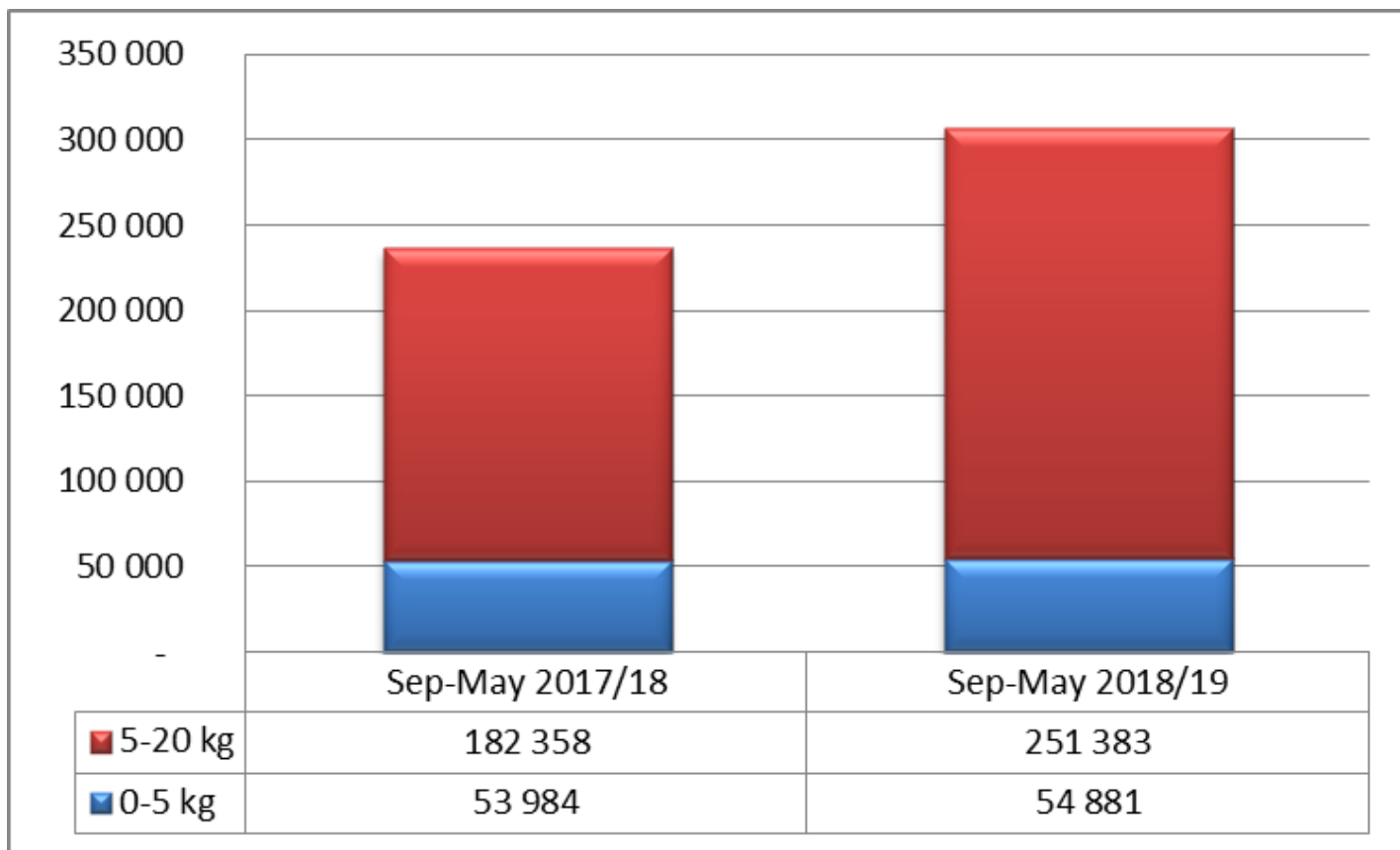


Total EU Rice Imports: Sep-May 2018/19 : + 16 % vs Sep-May 2017/18: \approx 1,1 Mio t (mill eq., excl broken)

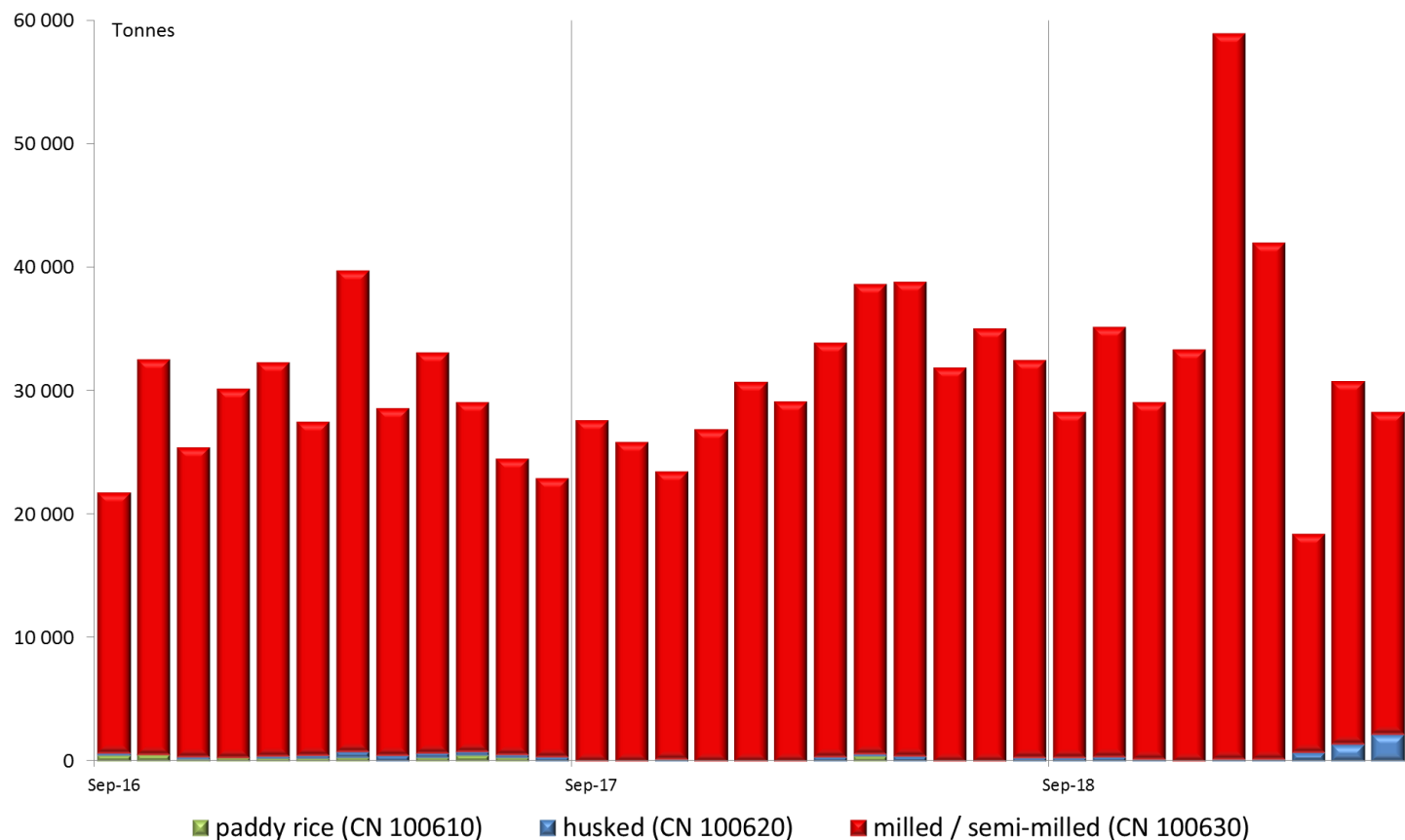


EU Rice Imports – Small packages (< 20kg)

MY 2018/19: +30% vs 2017/18



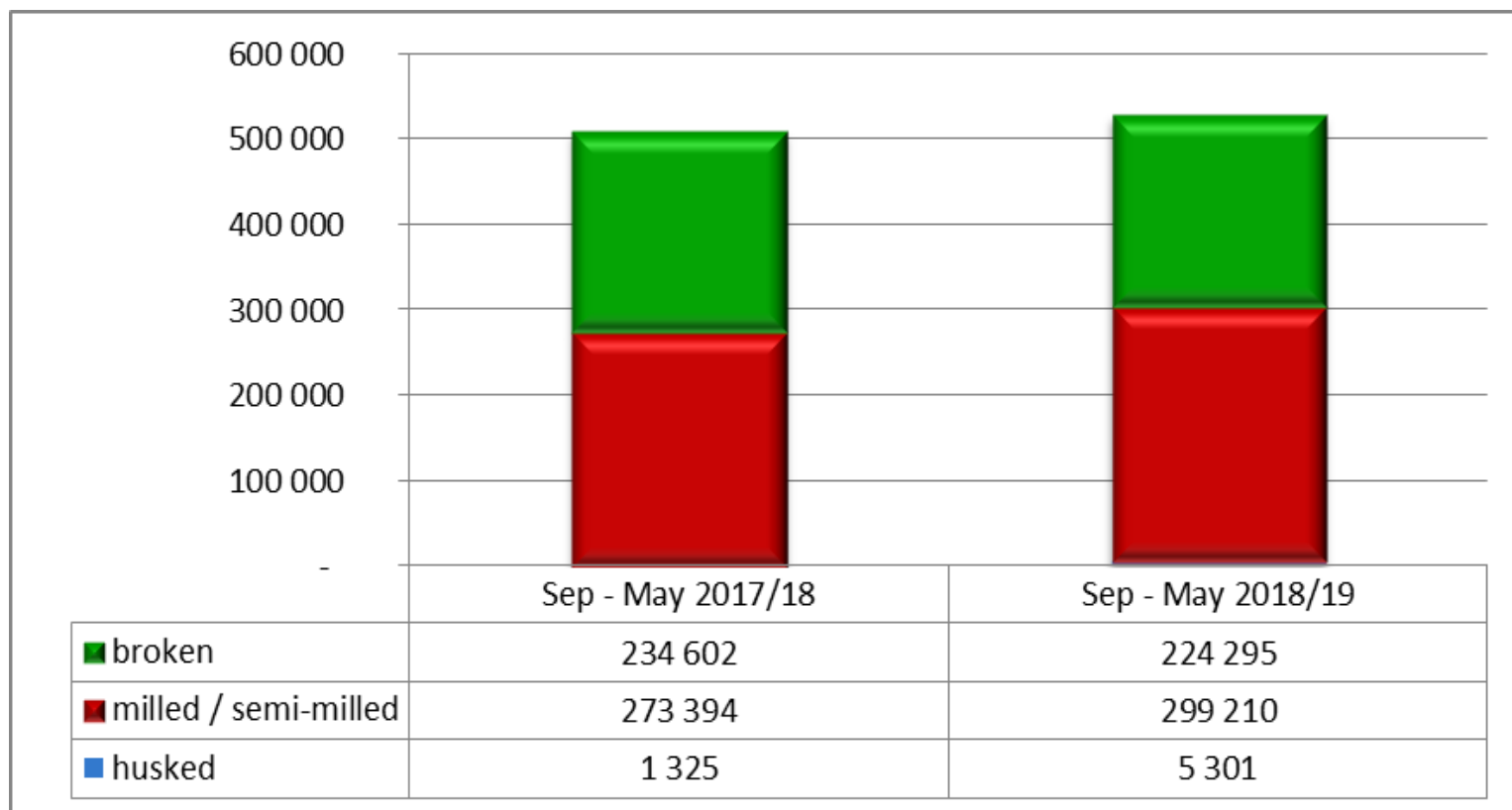
Total EBA Rice Imports per category



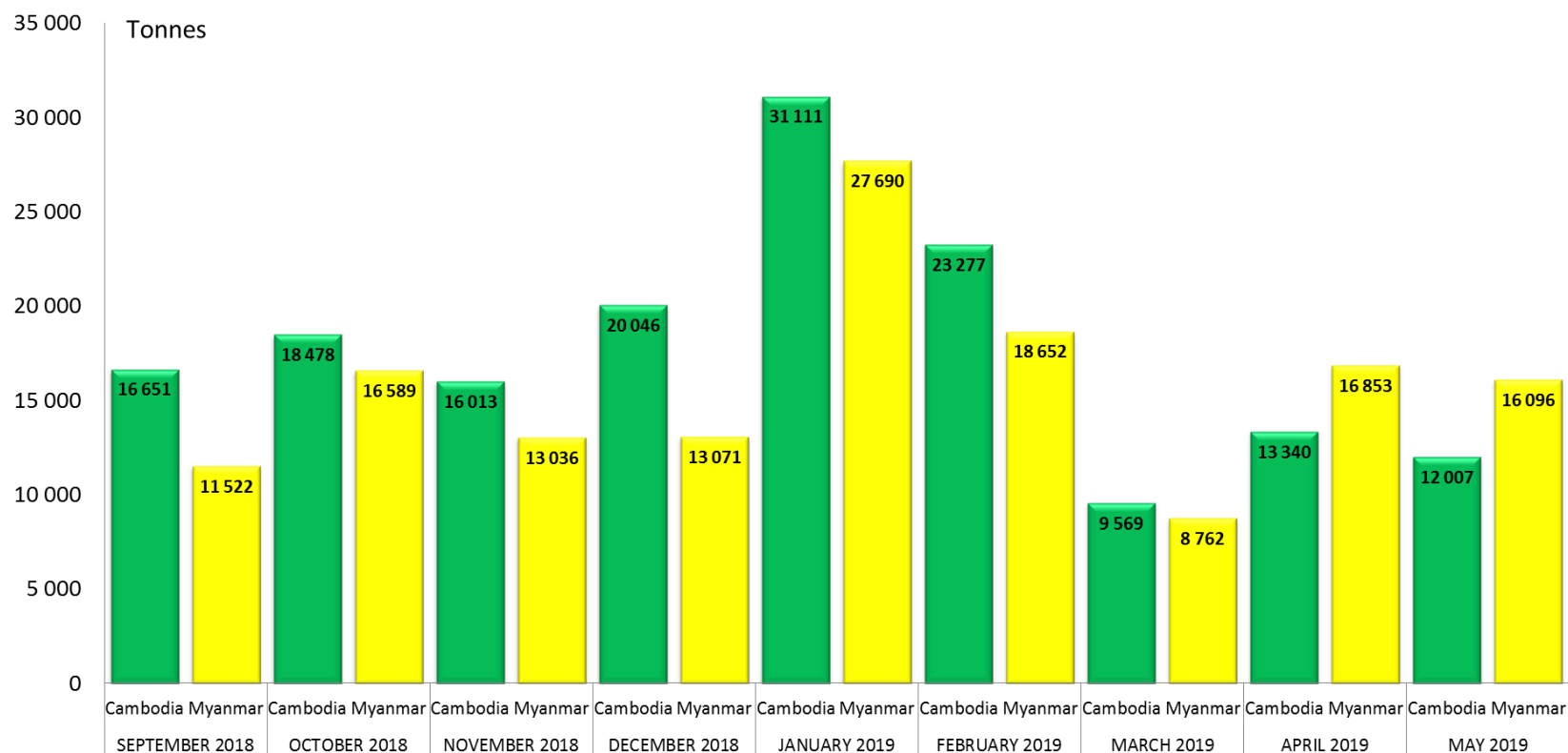
Source: TAXUD Surveillance/Comext©

Total EBA rice imports: UP 11 % in 2018/19

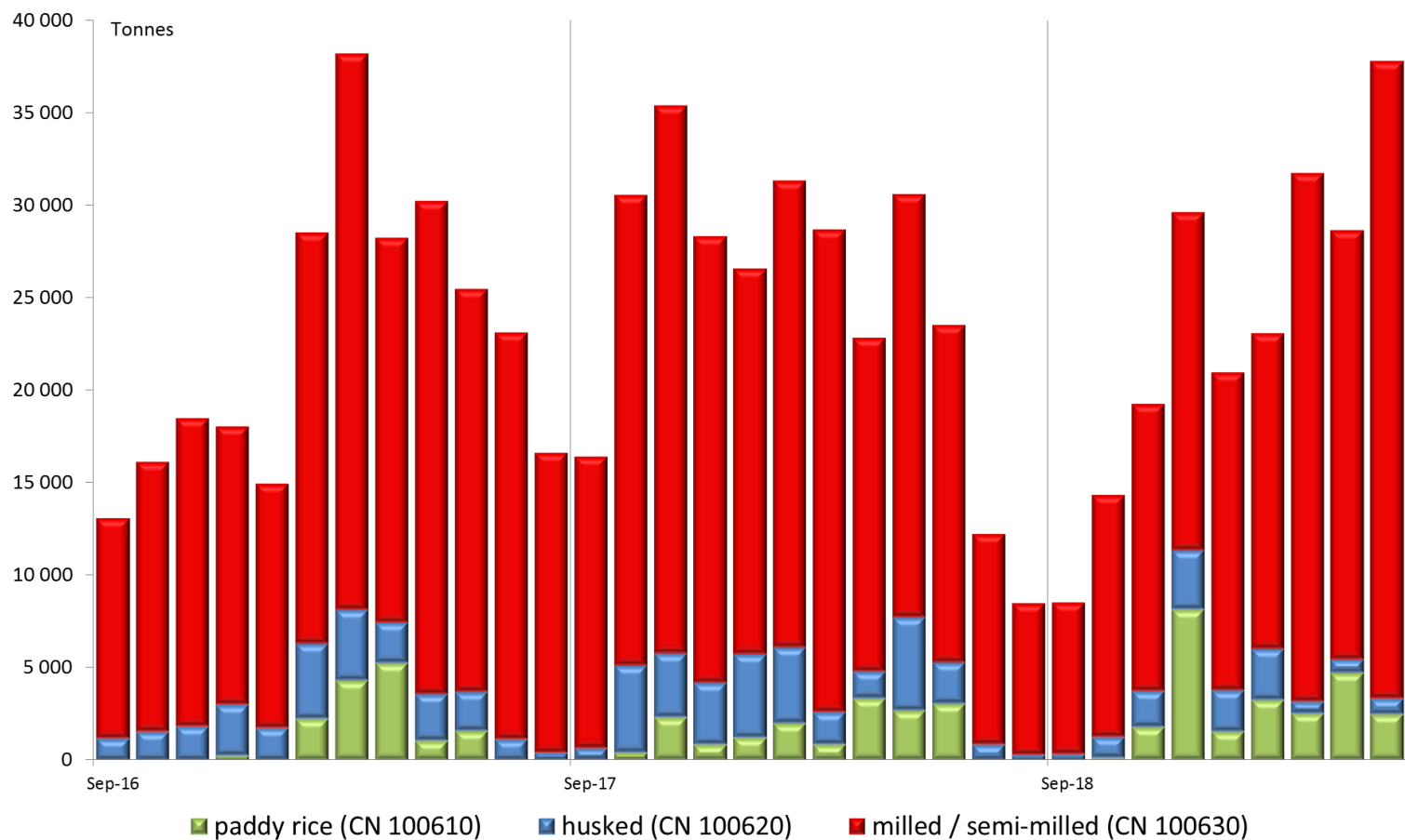
Sep-May 2018/19: 304 540 t (milled eq, excl broken)



EBA imports of husked and milled rice into the EU in MY 2018/19



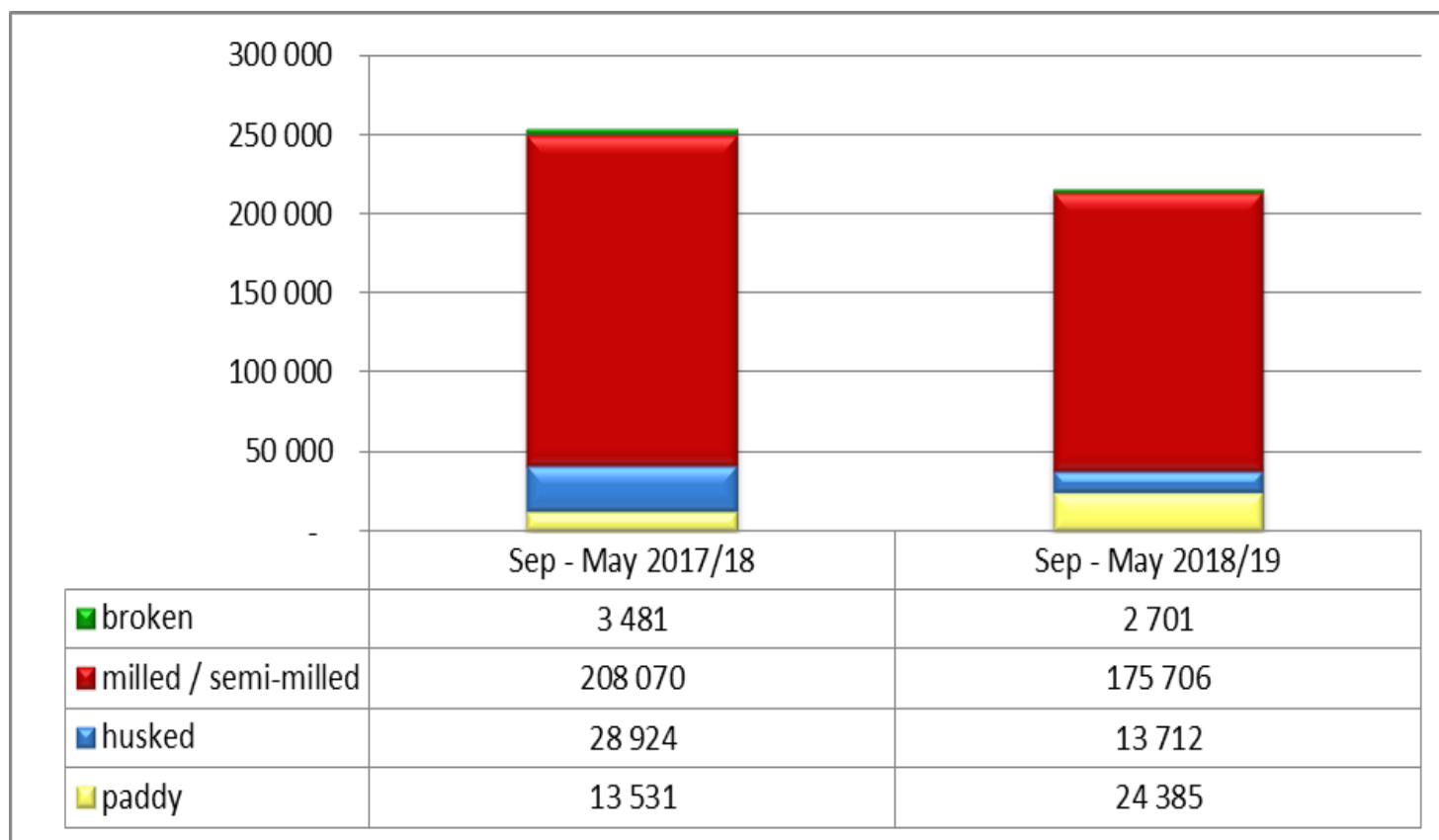
Total Rice Exports per category



Source: TAXUD Surveillance/Comext©

Total EU rice exports: **DOWN 15% in 2018/19**

Sep–May 2018/19: **213 803 t** (milled eq, excl. broken)





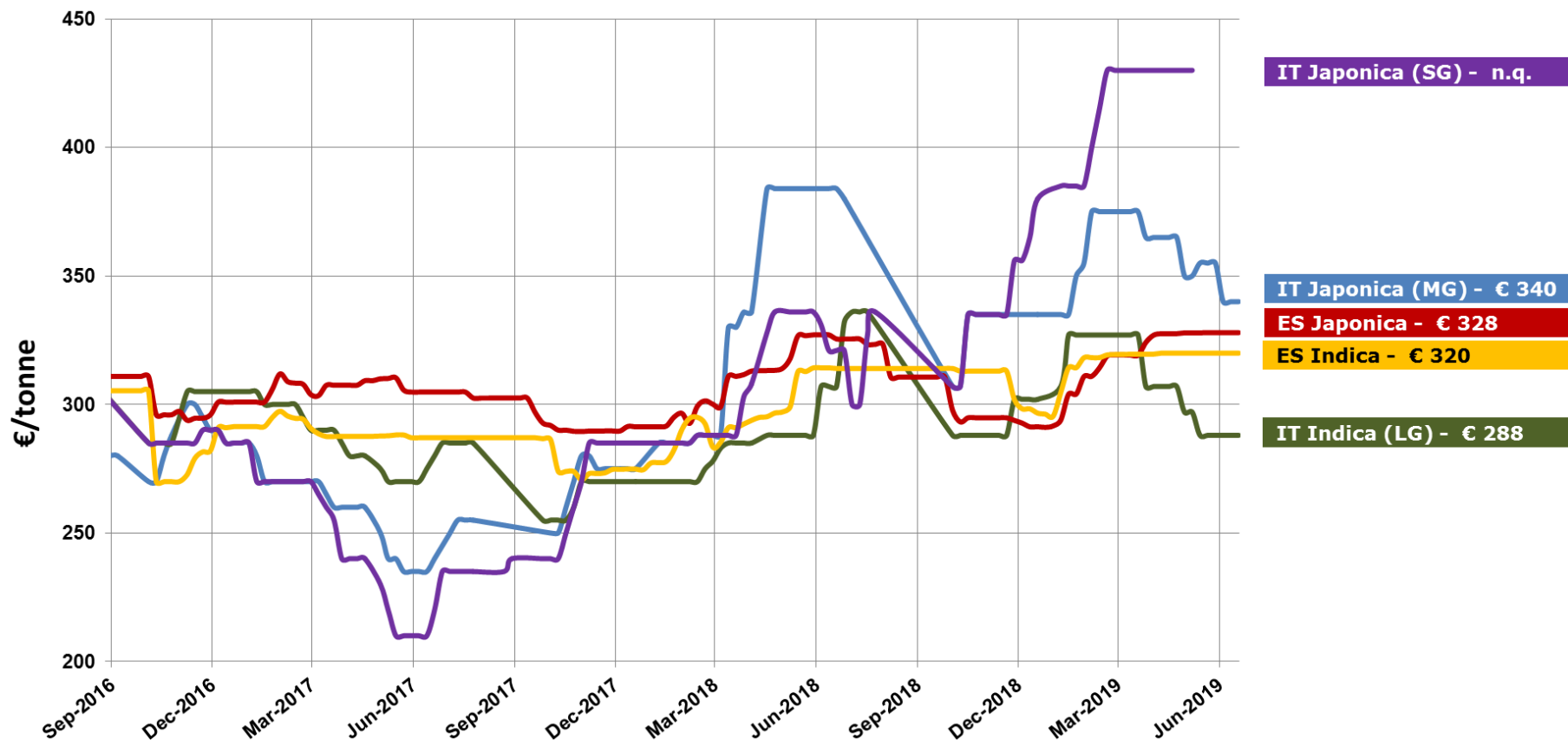
CONTENTS

1. International Rice Market

2. EU Rice Trade

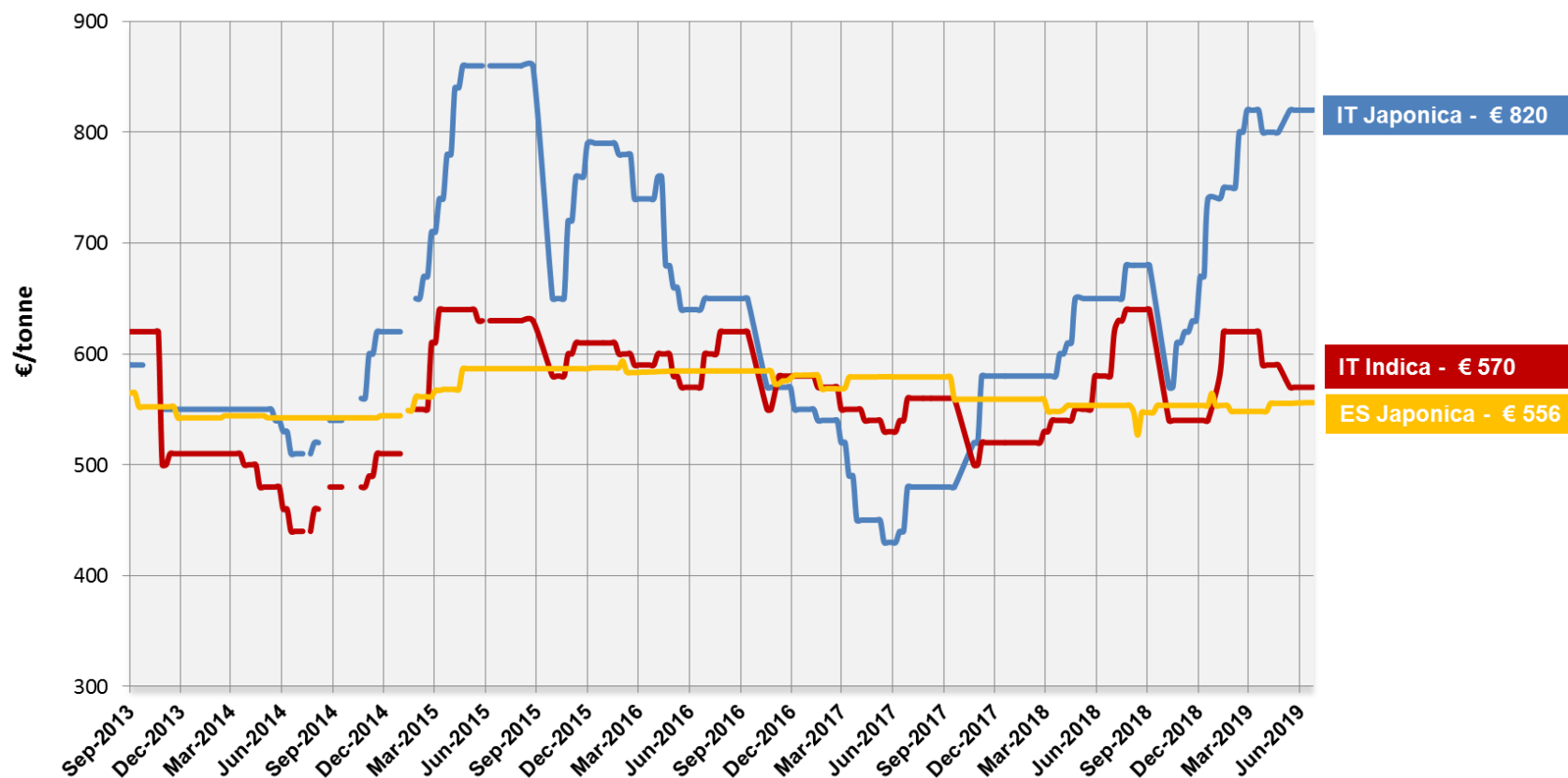
3. EU Rice Market

EU paddy rice prices



Source: Member States' notifications - Commission Implementing Regulation (EU) 2017/1185 Art. 11, Annex I Point 2

EU milled rice prices



Source: Member States' notifications - Commission Implementing Regulation (EU) 2017/1185 Art. 11, Annex I Point 2

EU Rice balance sheet

'000 metric tonnes (in milled equivalent)	2017/18			2018/19 est		
	Japonica	Indica	TOTAL	Japonica	Indica	TOTAL
Beginning stocks						
<i>Private</i>	378	265	643	293	233	526
<i>Intervention</i>	-	-	-	-	-	-
Total beginning stocks	378	265	643	293	233	526
Usable production	1 274	459	1 733	1 203	418	1 621
<i>Area ('000 ha)</i>	326	103	429	322	93	414
<i>Agronomic yield (t/ha, on paddy basis)</i>	6.6	7.5	6.8	6.5	7.4	6.7
<i>Milling yield (%)</i>	1	1	1	57%	61%	58%
Imports (from third countries)	135	1 198	1 333	150	1 200	1 350
TOTAL SUPPLY	1 788	1 922	3 710	1 645	1 851	3 497
Domestic uses						
<i>Human consumption / Industrial uses / Animal feed</i>	1 192	1 648	2 841	1 138	1 735	2 874
<i>Seed ***</i>	39	10	49	37	9	46
Total domestic uses	1 231	1 658	2 889	1 175	1 744	2 920
Exports (to third countries)	264	30	295	238	27	265
TOTAL USE	1 496	1 689	3 184	1 413	1 771	3 185
Final stocks *****						
<i>Private</i>	293	233	526	232	80	312
<i>Intervention</i>	-	-	-	-	-	-
Total final stocks	293	233	526	232	80	312
Change in stocks	-86	-32	-118	-61	-153	-214
Change in public stocks	-	-	-	-	-	-



Conclusions

- **EU rice production 2018/19: down 6,5%**
- **EU rice imports in 2018/19: up 16%**
- **EU rice exports in 2018/19: down 15%**
- **EU prices: in slight uptrend as production down, but pressure from imports**



Thank you for your attention!