



# **Crops Market Observatory latest developments**

**CROPS Market Observatory  
4<sup>th</sup> December 2017**



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- **Follow-up to 1st meeting of July 2017**
- **New features in the Crops MO Webpage**
- **New tool for Data Exploration**



# Follow-up to 1st meeting of July 2017

## Recommendations/Requests

- Collection and publication of **EU oilseeds and protein crops prices**
- Publication of **weekly trade data for oilseed exports**
- More detailed **data collection for domestic use of crops**
- More detailed **data collection on harvest quality**
- Creation of a specific (and restricted) space for **sharing information between members**

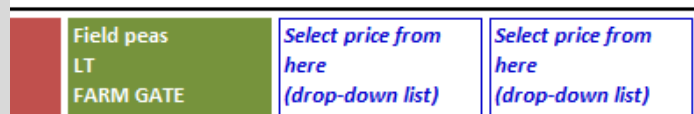
# Follow-up to 1st meeting of July 2017

## Recommendations/Requests

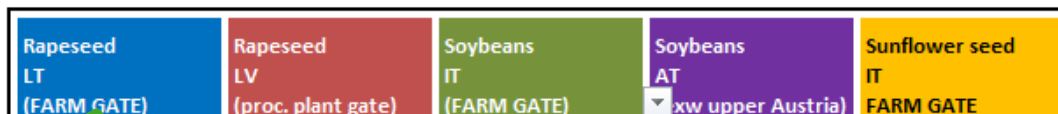
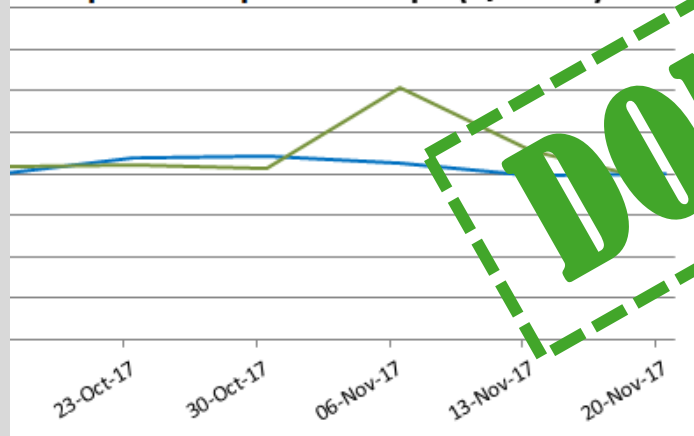
- Collection and publication of **EU oilseeds and protein crops prices**

### EU market prices for oilseeds and protein crops

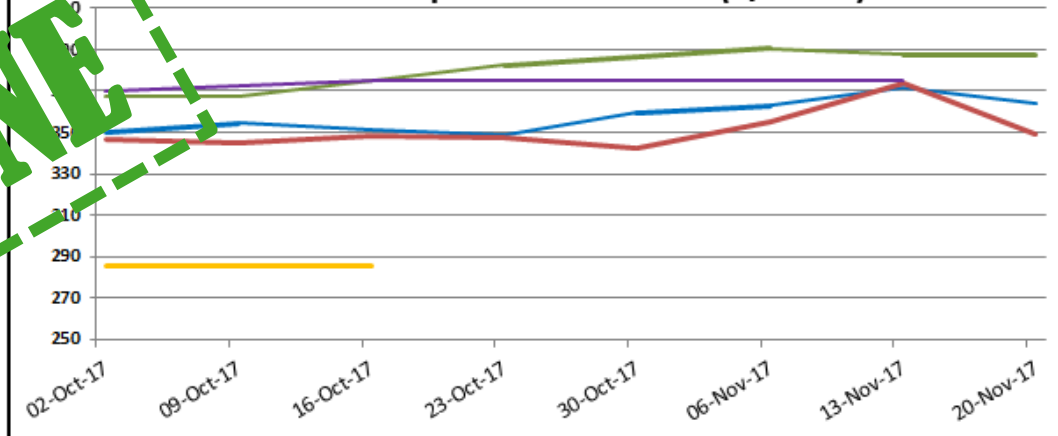
17



Market prices for protein crops (€/tonne)



EU Market prices for oilseeds (€/tonne)



**DONE**

# Follow-up to 1st meeting of July 2017

## Recommendations/Requests

- Publication of **weekly trade data for oilseed exports**

Top 5 export destinations - Current marketing year 2017/18 -

Soyabeans		
Destination	tonnes	share
Serbia	122 625	76.2%
Bosnia and Herzegovina	16 980	10.6%
Russian Federation	12 978	8.1%
Switzerland	5 686	3.5%
Gabon	1 009	0.6%

Rapeseed		
Destination	tonnes	share
United Arab Emirates	28 501	27.3%
Islamic Republic of Iran	27 645	26.4%
South Africa	20 998	20.1%
Turkey	12 663	12.1%
Israel	6 847	6.5%

Soyameal		
Destination	tonnes	share
Uzbekistan	37 740	17.9%
Switzerland	26 959	12.8%
Norway	21 348	10.1%

Rapeseed meal		
Destination	tonnes	share
Norway	57 997	37.5%
Israel	34 028	22.0%
Morocco	31 566	20.4%

# Follow-up to 1st meeting of July 2017

## Recommendations/Requests

- More detailed **data collection for domestic use of crops**
  - Few bilateral meetings with 3 member organisations already held:
    - ePURE
    - Cefic
    - FEFAC
  - Meetings will be requested to other organisation members

Work in progress

# Follow-up to 1st meeting of July 2017

## Recommendations/Requests

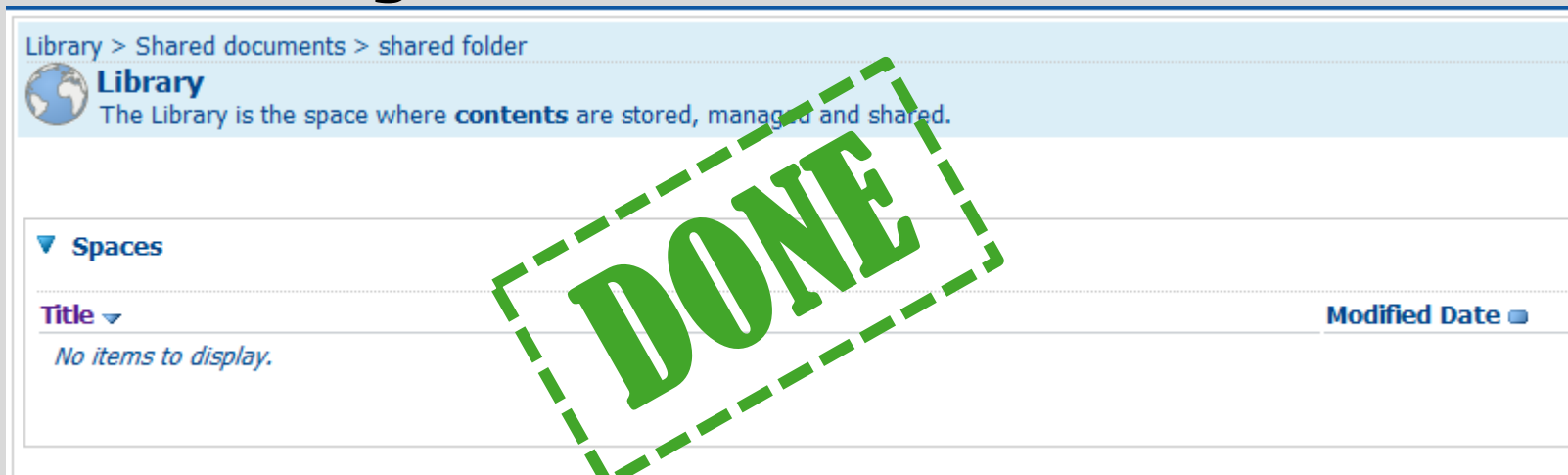
- More detailed **data collection on harvest quality**
  - Raw data collected
  - Data analysis to be performed

Work in progress

# Follow-up to 1st meeting of July 2017

## Recommendations/Requests

- Creation of a specific (and restricted) space for **sharing information between members**



- **Currently empty:** any technical issues on uploading documents??

# New features in the Crops MO webpage

- **Trade: Exports and imports (Comext)**
  - Added: "Trade by main MS & Partners"
  - Revised: drop-down list sorted by volume of trade
- **Anything else to be added?**



# New tool for Data Exploration



[European Commission](#) > [Food, farming](#) > [Agricultural markets](#) >

## Agri-food data

The agri-food data site provides accurate and easy-to-use market data on national and European agriculture provided by the European Commission's agricultural and rural development department.



# Agri-food data portal

- Pilot **Pig Meat Data Portal**: 1st phase finalised and published
    - Data on prices, production and trade
  - **Cereals Data Portal**:
    - Prices finalised
    - Production, Trade: work in progress
- Let's have a look>>



# Cereals, oilseeds and proteins Market Situation

**CROPS Market Observatory**  
**4<sup>th</sup> December 2017**



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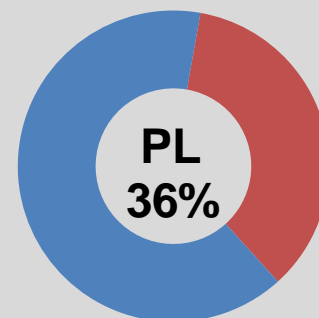
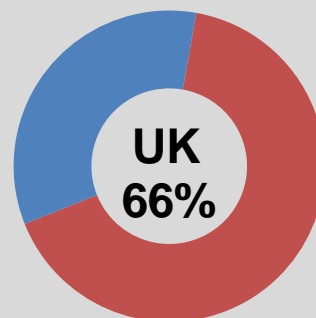
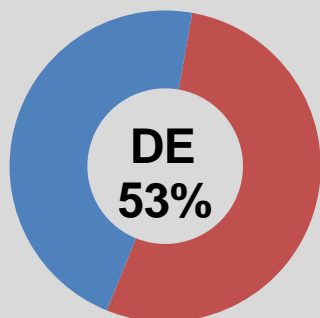
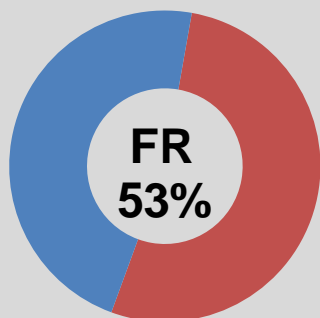
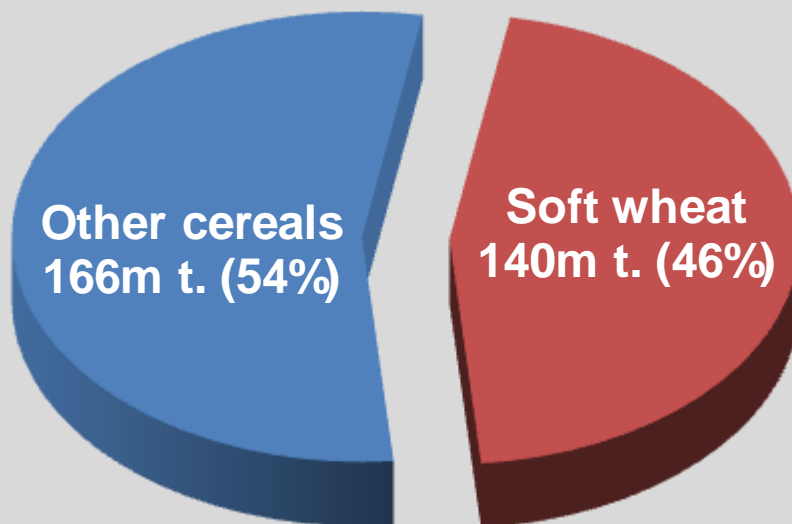
- **Present EU market situation and short-term outlook**
  - **Production**
  - **Trade**
  - **Prices**



# Cereals

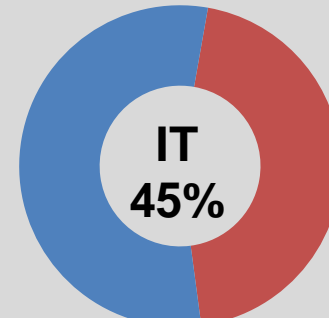
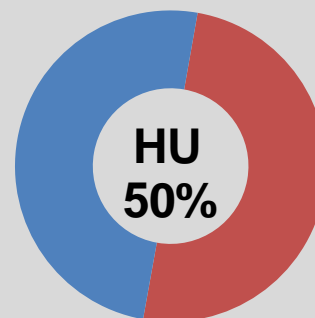
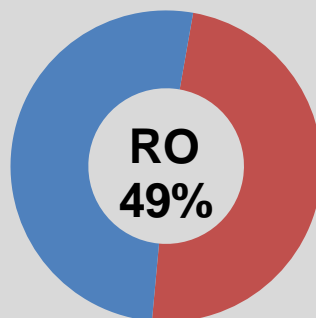
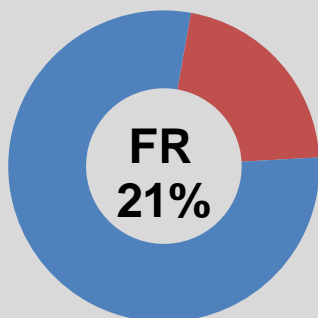
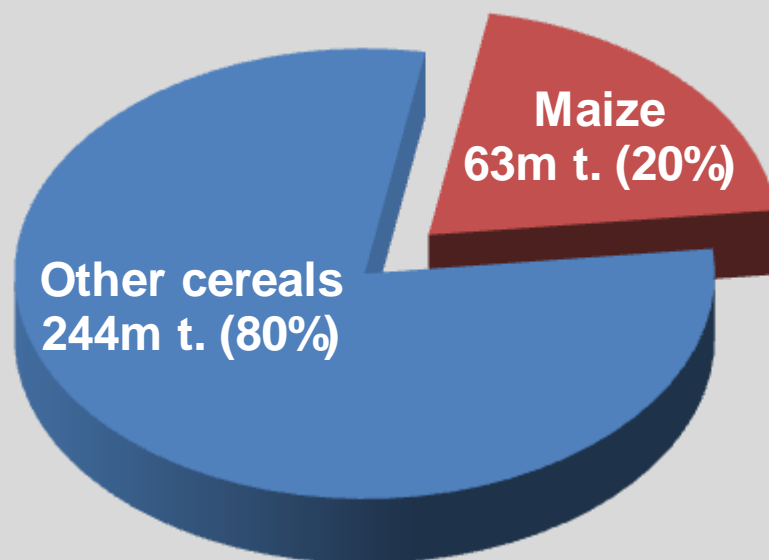
# Soft wheat vs all other cereals

EU-28 Production  
5 year trimmed average (2012 - 2016)



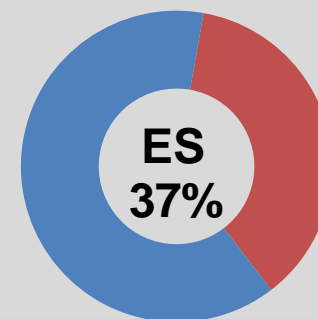
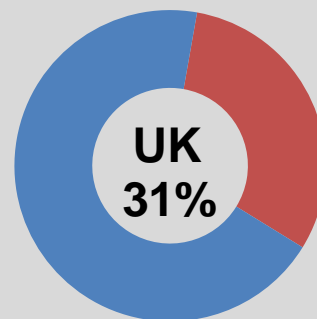
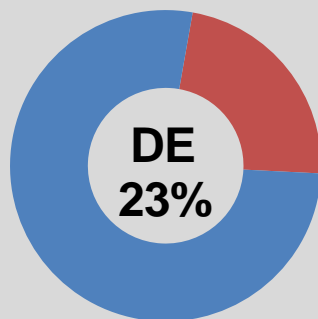
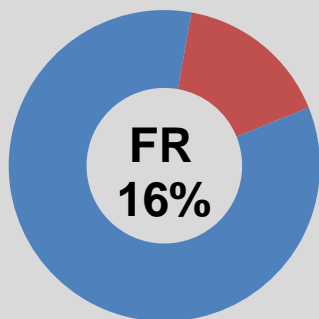
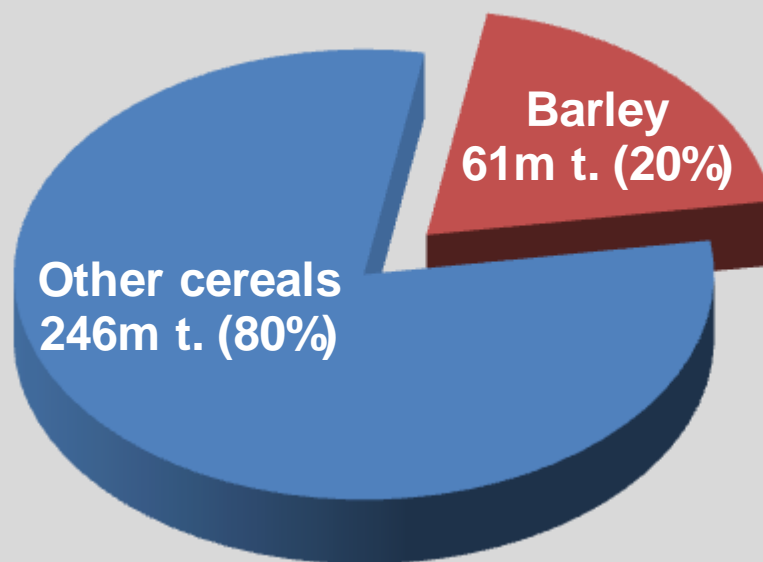
# Maize vs all other cereals

EU-28 Production  
5 year trimmed average (2012 - 2016)



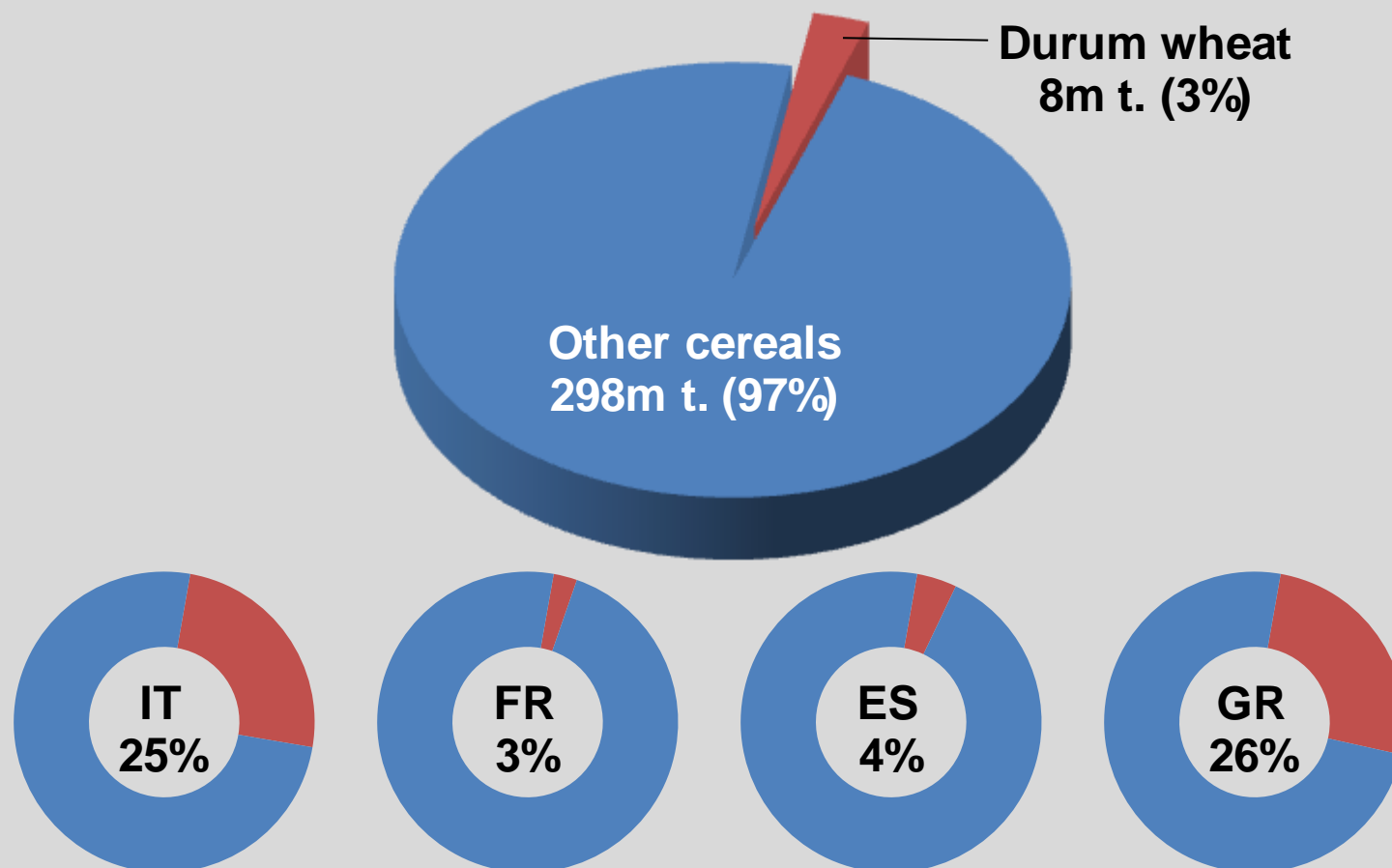
# Barley vs all other cereals

EU-28 Production  
5 year trimmed average (2012 - 2016)



# Durum wheat vs all other cereals

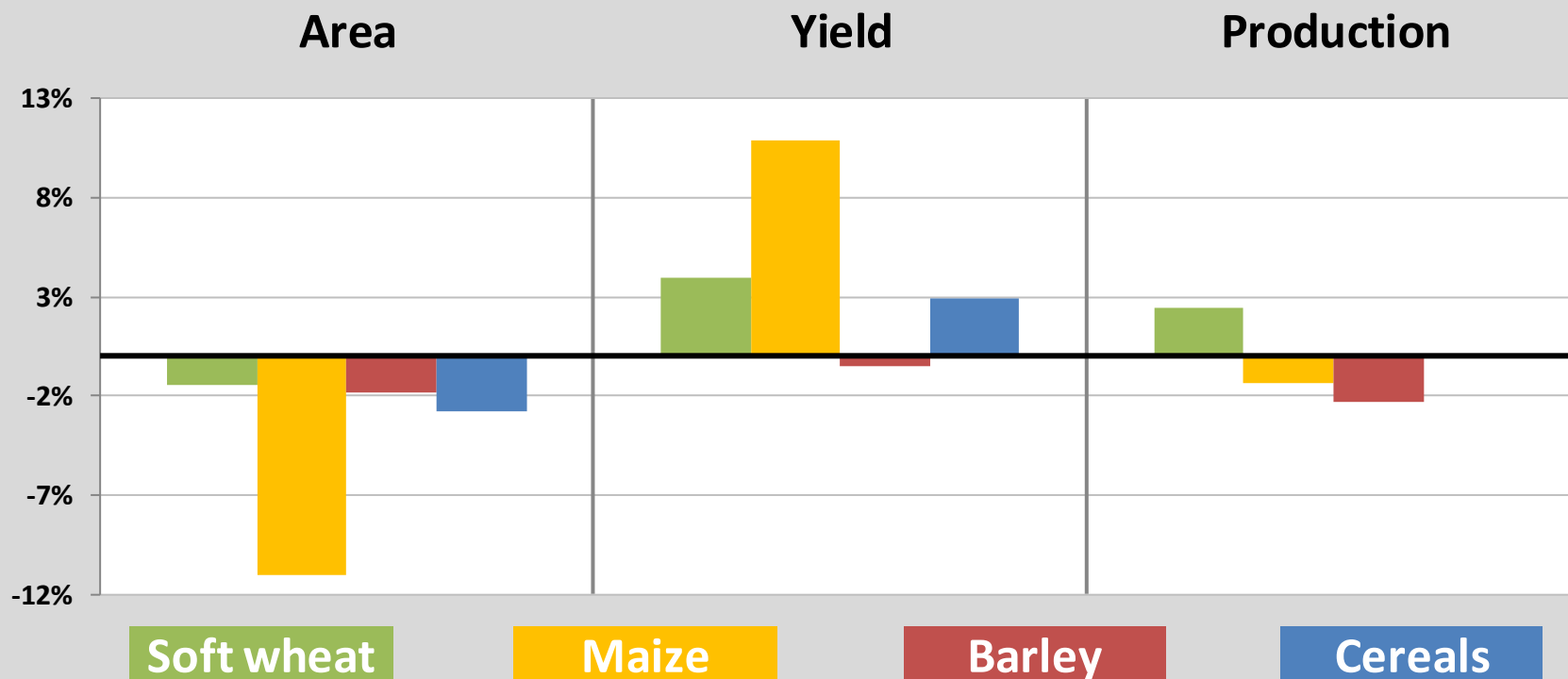
EU-28 Production  
5 year trimmed average (2012 - 2016)



# EU cereals production: 2017/18: 304 million tonnes

less maize (area), less barley, more soft wheat (yield)

2017/18 vs 5Y-trimmed average



# EU Cereals Production: 2017/18 : back to average after 2016/17

EU EVOL CEREALS USABLE PRODUCTION					
Million tonnes	2015/2016	2016/2017	2017/2018 Oct fcst	2017/2018 Nov fcst	%change 2016/2017
<b>TOTAL</b>	<b>311,5</b>	<b>296,1</b>	<b>299,0</b>	<b>304,3</b>	2,8
Soft wheat	151,3	133,8	141,5	142,5	6,5
Durum wheat	8,3	9,2	9,0	9,3	1,1
Barley	61,4	59,5	58,0	58,7	-1,3
Maize	59,0	62,8	58,5	62,2	-1,0
Rye	7,6	7,2	7,3	7,2	0,0
Oats	7,5	8,0	8,5	8,3	3,8

Sources : DG AGRI -G4

# 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

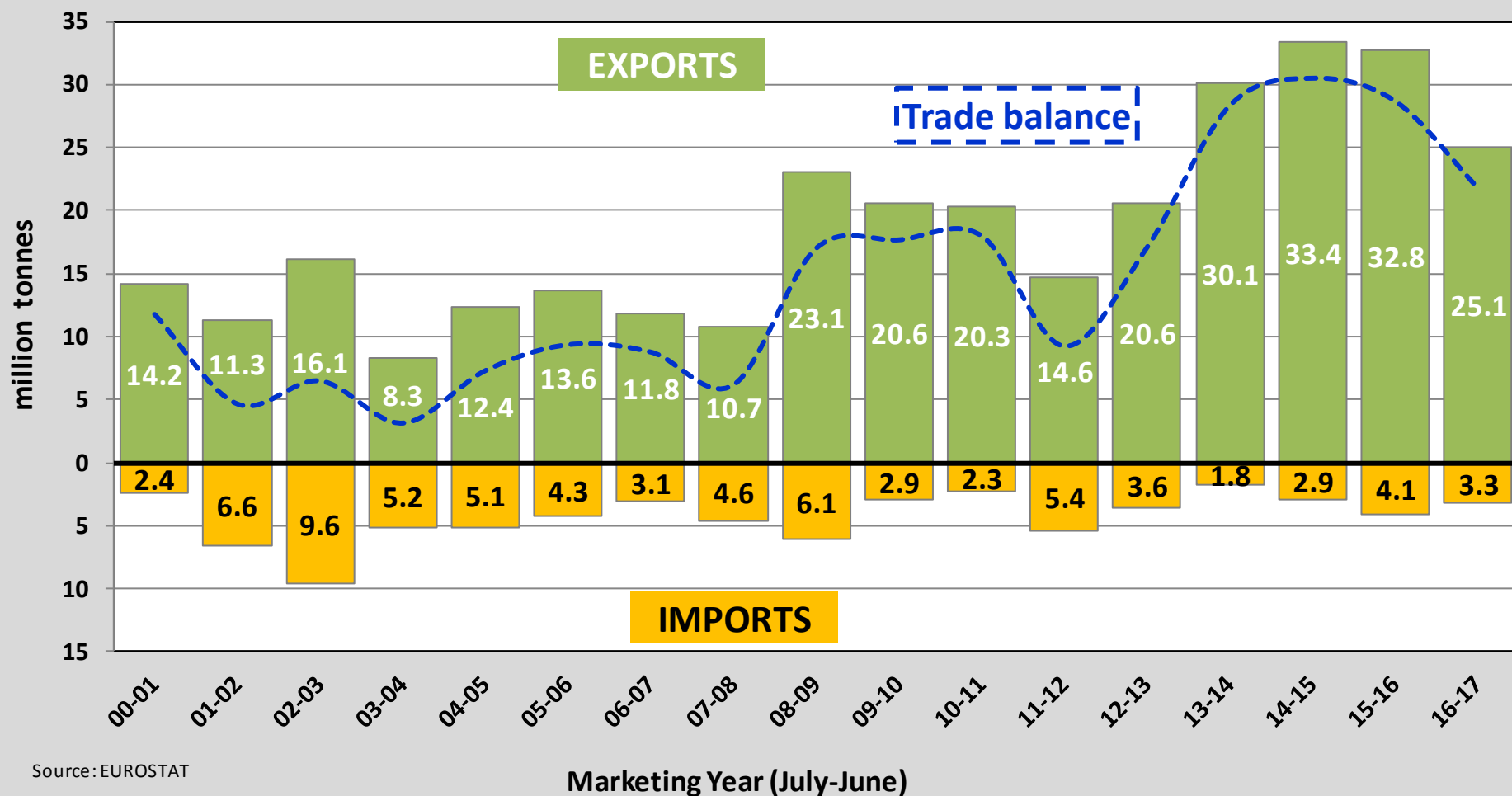


# **EU Cereals Production: Outlook**

**Quantity: will the EU production reach again  
310 millions tonnes or even more?**

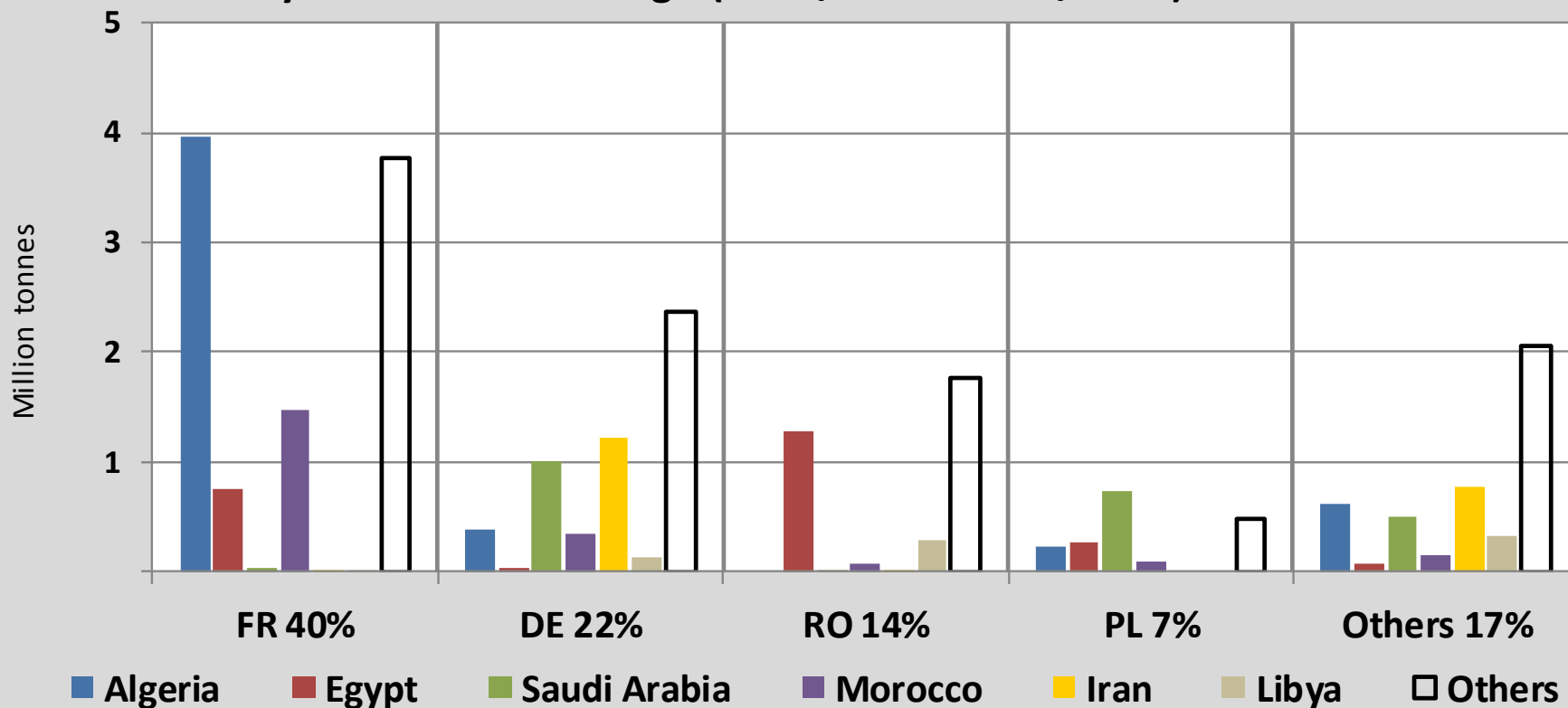
**Quality: still a driver on global market?**

# EU28 Soft wheat exports and imports

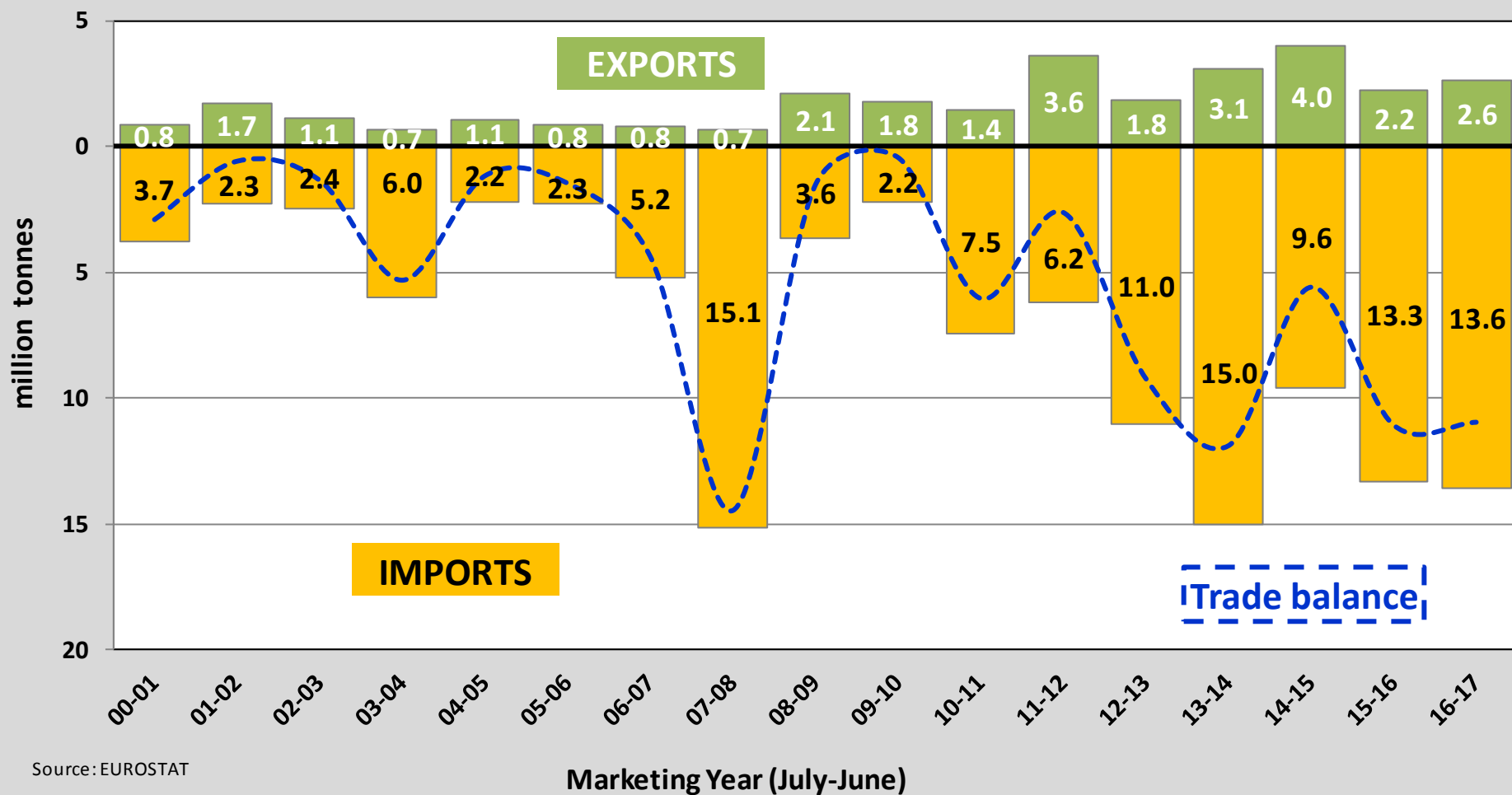


# EU soft wheat exporting MS and destinations

5-year trimmed average (2012/2013 - 2016/2017): 29.3m t.

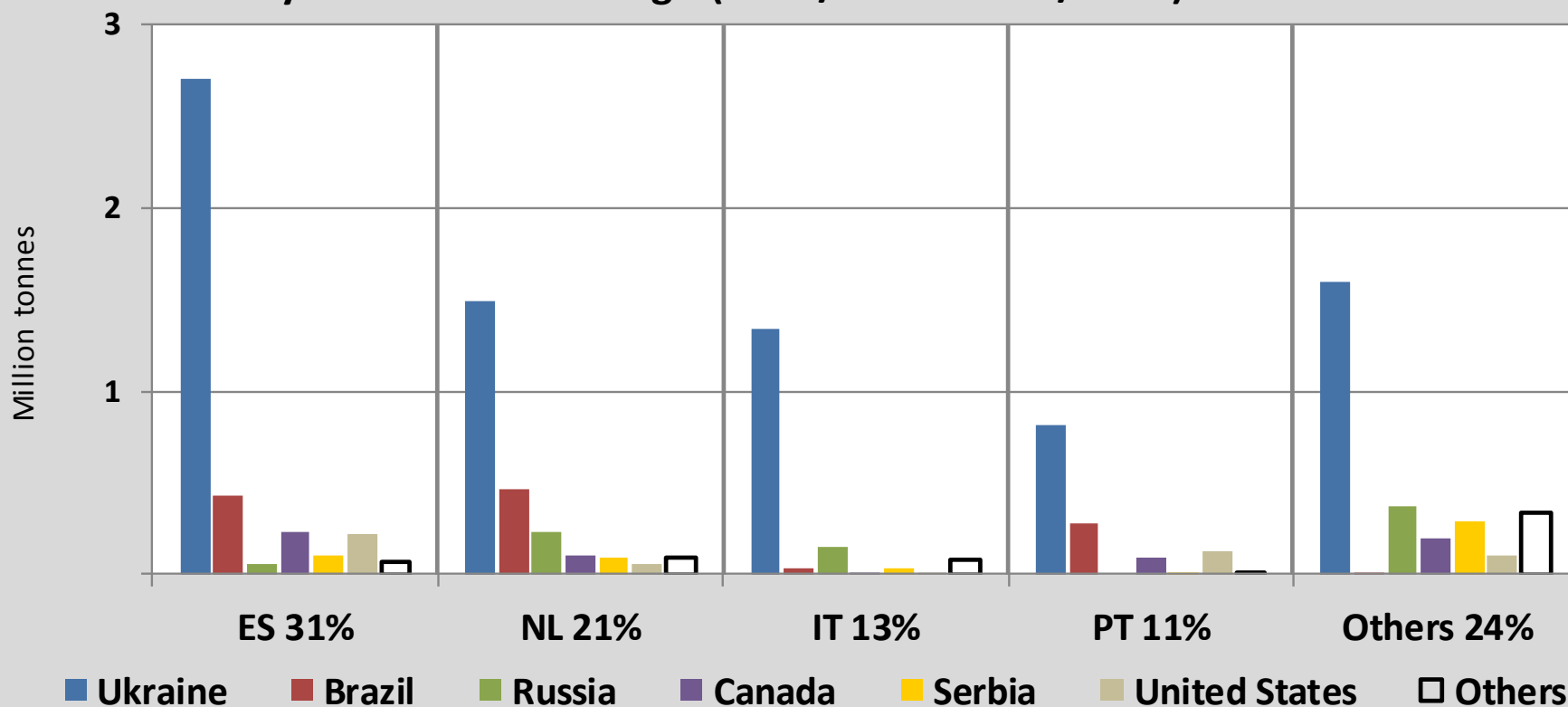


# EU28 Maize exports and imports



# EU maize importing MS and origins

5-year trimmed average (2012/2013 - 2016/2017): 12.7m t.





# **EU Cereals Trade: Outlook**

**Exports: will EU wheat still be competitive  
versus Black Sea origin?**

**Imports: more and more maize to come?**

# EU milling wheat prices

DE:  
Hamburg  
(DEPSILO)

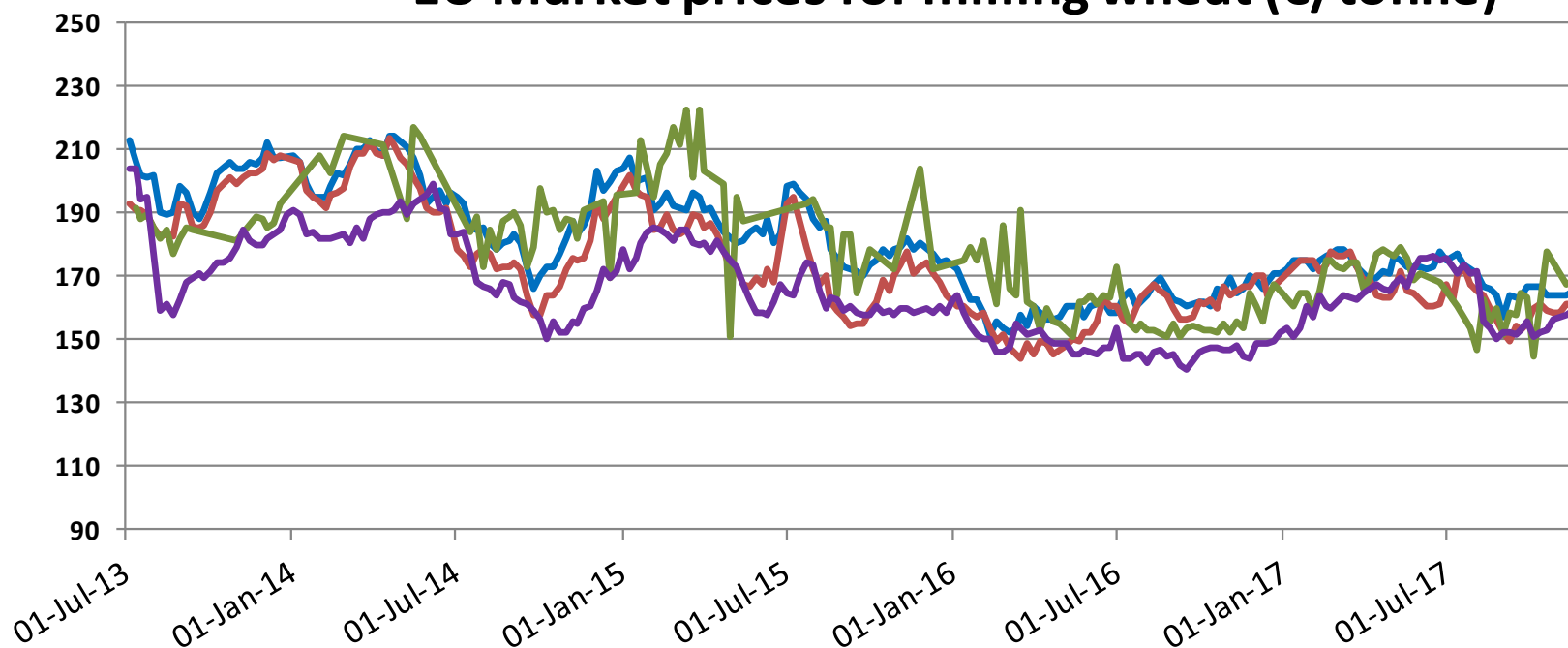
FR:  
Rouen  
(DELPORT)

RO:  
Constanta  
(FOB)

PL:  
Zachodni  
(DELFIRST)

Select price from  
here  
(drop-down list)

EU Market prices for milling wheat (€/tonne)





# EU feed barley prices

UK:  
East Coast  
(FOB)

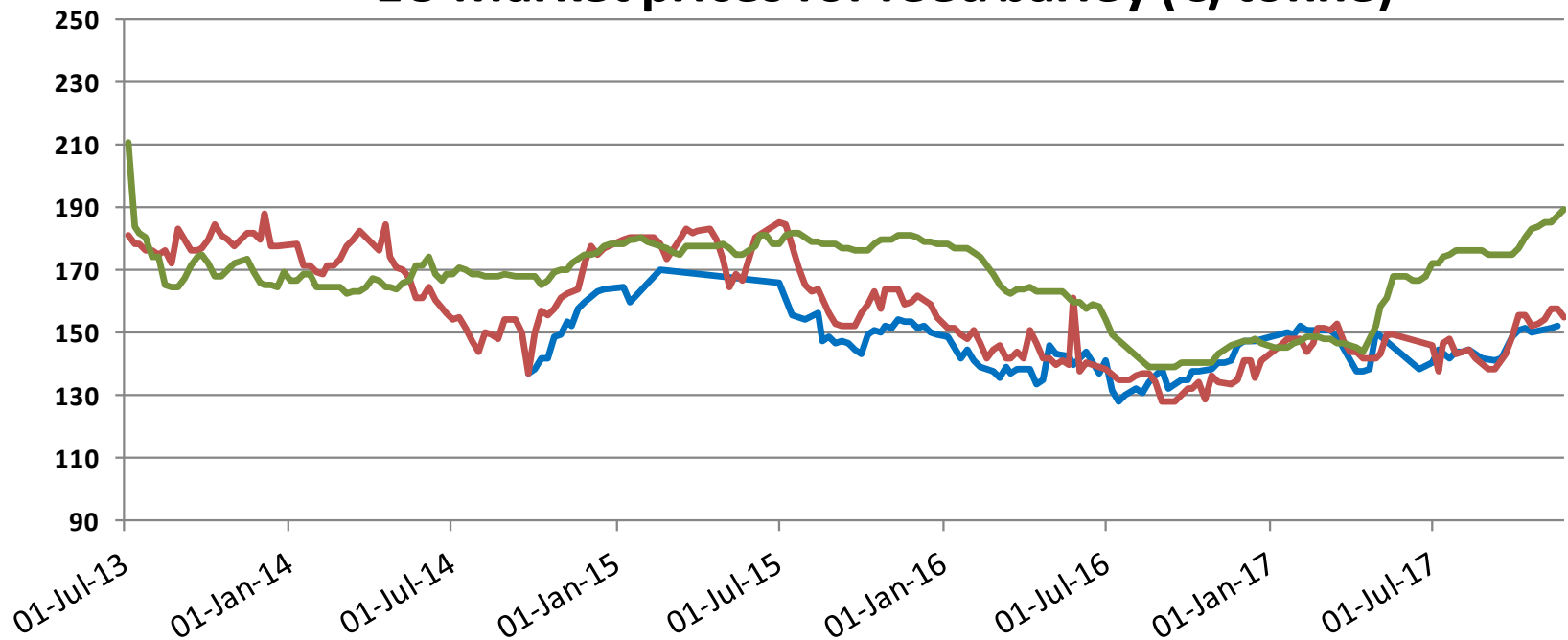
FR:  
Rouen  
(DELPORT)

ES:  
Valladolid  
(DEPSILO)

Select price from  
here  
(drop-down list)

Select price from  
here  
(drop-down list)

## EU Market prices for feed barley (€/tonne)





# EU maize prices

RO:  
Constanta  
(FOB)

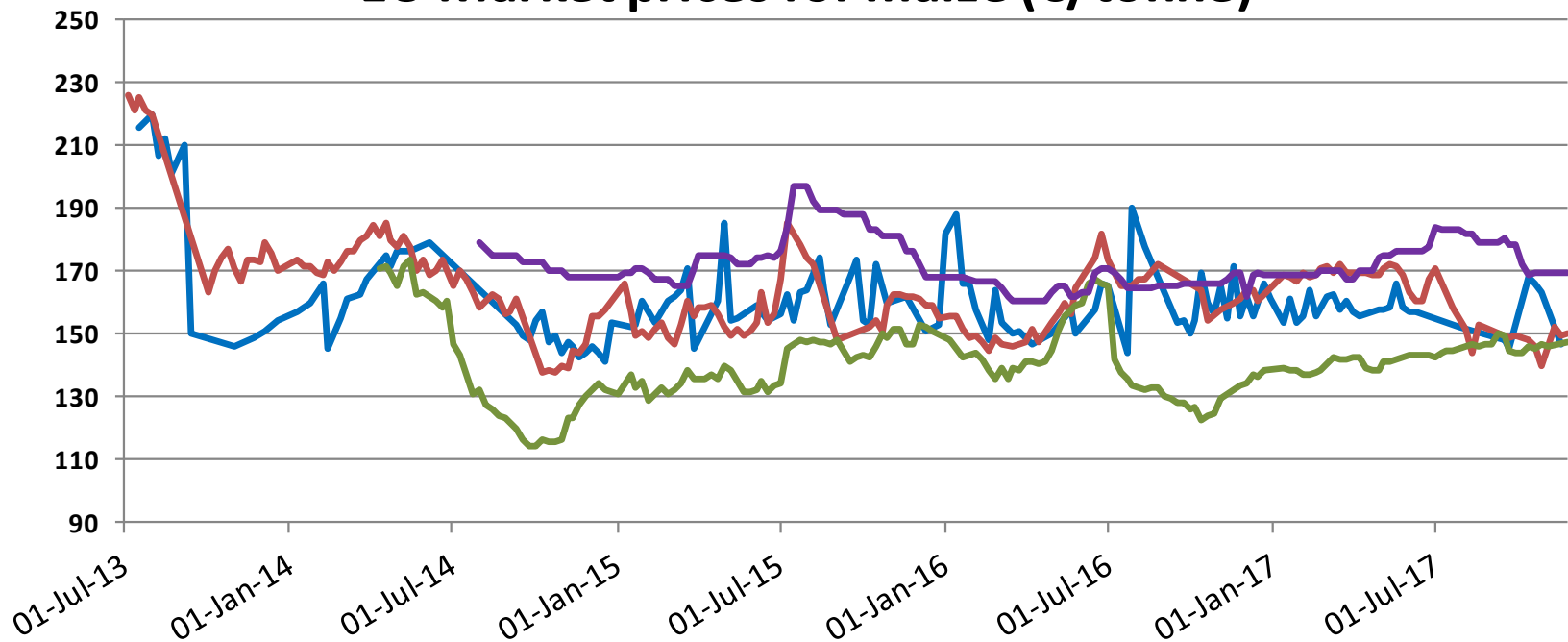
FR:  
Bordeaux  
(DELPORT)

HU:  
Budapest  
(DELPORT-GEX)

ES:  
Leon  
(DEPSILO)

Select price from  
here  
(drop-down list)

## EU Market prices for maize (€/tonne)



# EU Cereals Balance Sheet

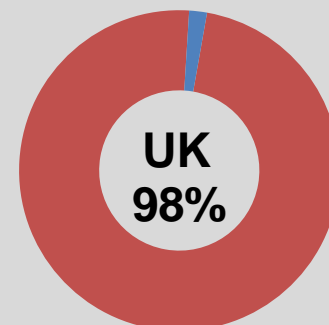
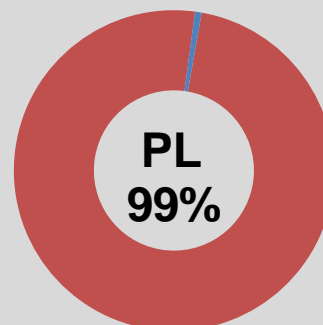
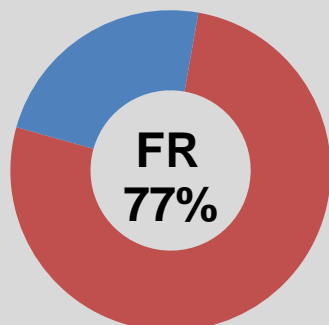
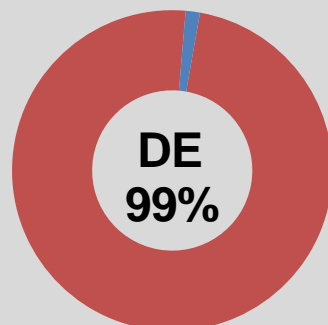
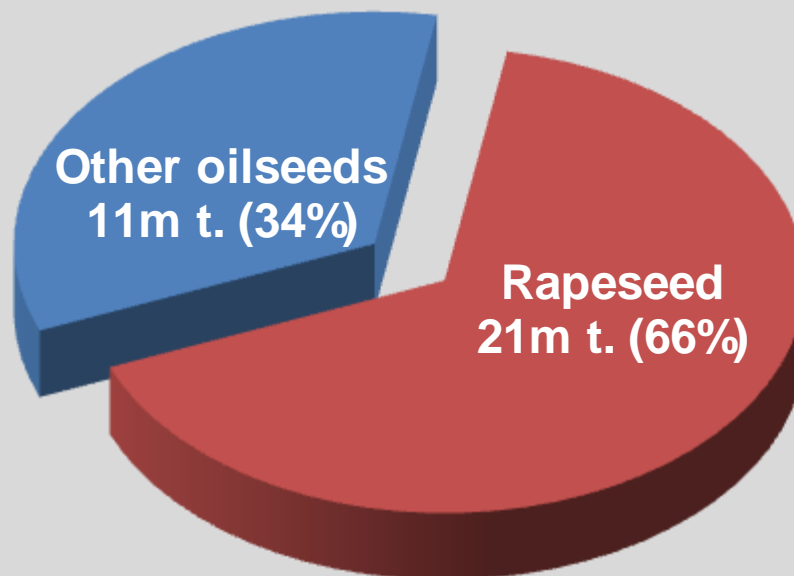
<b>LAST UPDATED: 30/11/2017</b>					
<b>EU 28 total cereals balance sheet (thousand tonnes)</b>					
	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018
<b>Beginning stocks</b>	<b>31 269</b>	<b>37 994</b>	<b>48 511</b>	<b>46 545</b>	<b>40 445</b>
Usable production	304 793	328 015	311 694	296 148	304 344
Imports (from third countries)	19 184	15 593	20 611	19 352	20 811
<b>Total supply</b>	<b>355 246</b>	<b>381 602</b>	<b>380 816</b>	<b>362 045</b>	<b>365 600</b>
Total domestic use	273 793	281 428	283 469	283 500	285 200
Human consumption	64 799	64 957	65 144	65 415	65 686
Seed	9 522	9 640	9 576	9 562	9 377
Industrial uses	32 352	32 641	33 138	33 433	33 937
Animal feed	164 900	171 980	173 400	172 880	173 990
Losses	2 220	2 210	2 210	2 210	2 210
Exports (to third countries)	43 459	51 663	50 802	38 099	37 761
<b>Total use</b>	<b>317 252</b>	<b>333 091</b>	<b>334 271</b>	<b>321 600</b>	<b>322 961</b>
<b>Ending stocks**</b>	<b>37 994</b>	<b>48 511</b>	<b>46 545</b>	<b>40 445</b>	<b>42 639</b>
Change in stocks**	6 725	10 517	-1 967	-6 099	2 193



# Oilseeds and protein crops

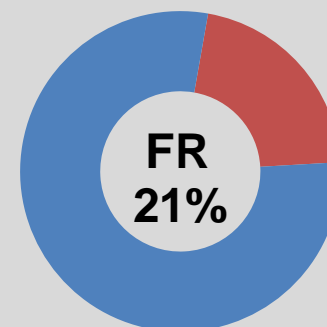
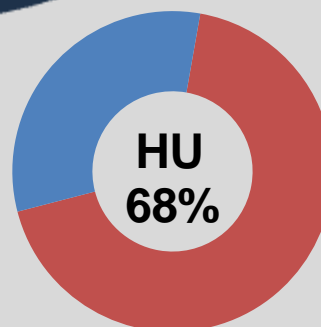
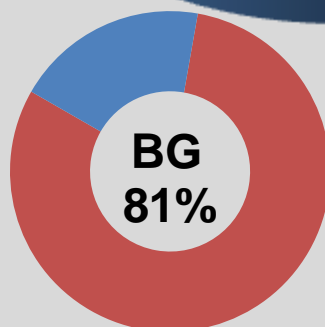
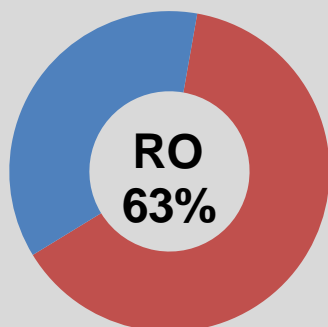
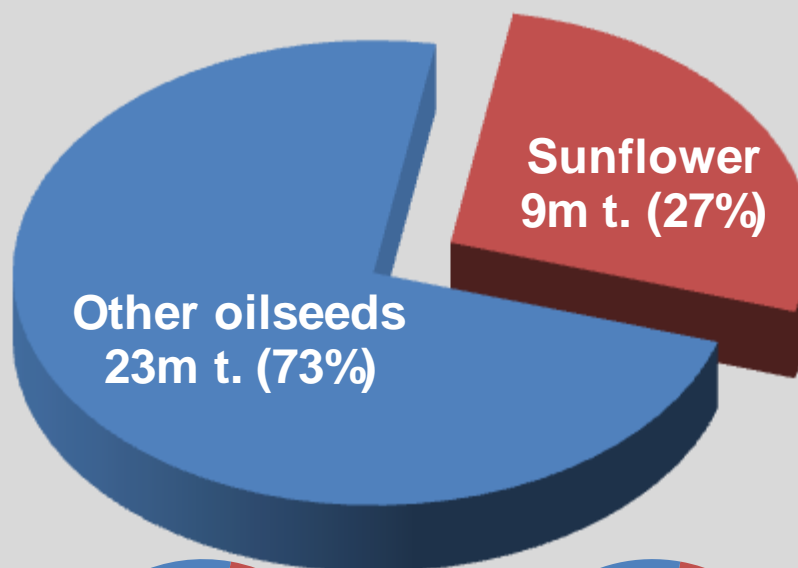
# Rapeseed vs all other oilseeds

EU-28 Production  
5 year trimmed average (2012 - 2016)



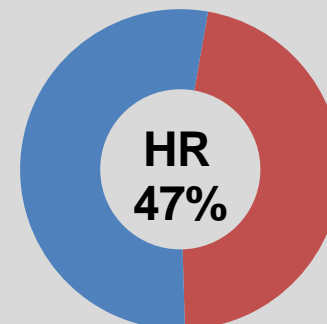
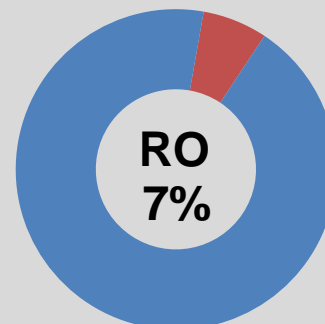
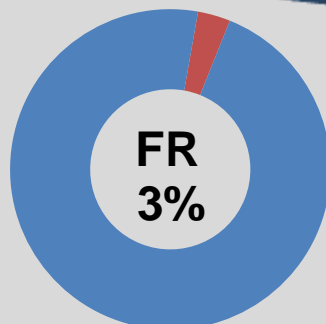
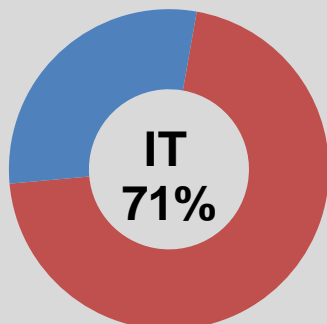
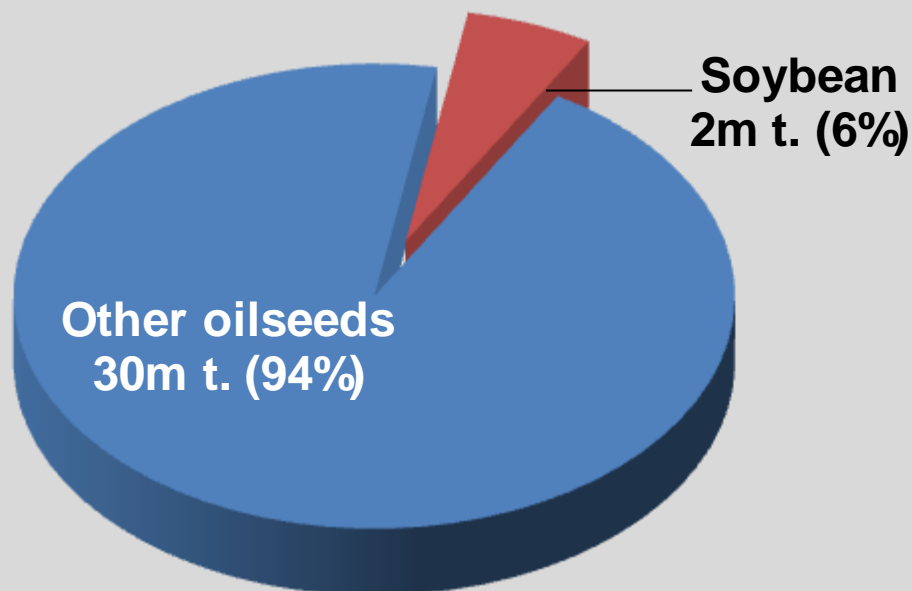
# Sunflower seed vs all other oilseeds

EU-28 Production  
5 year trimmed average (2012 - 2016)



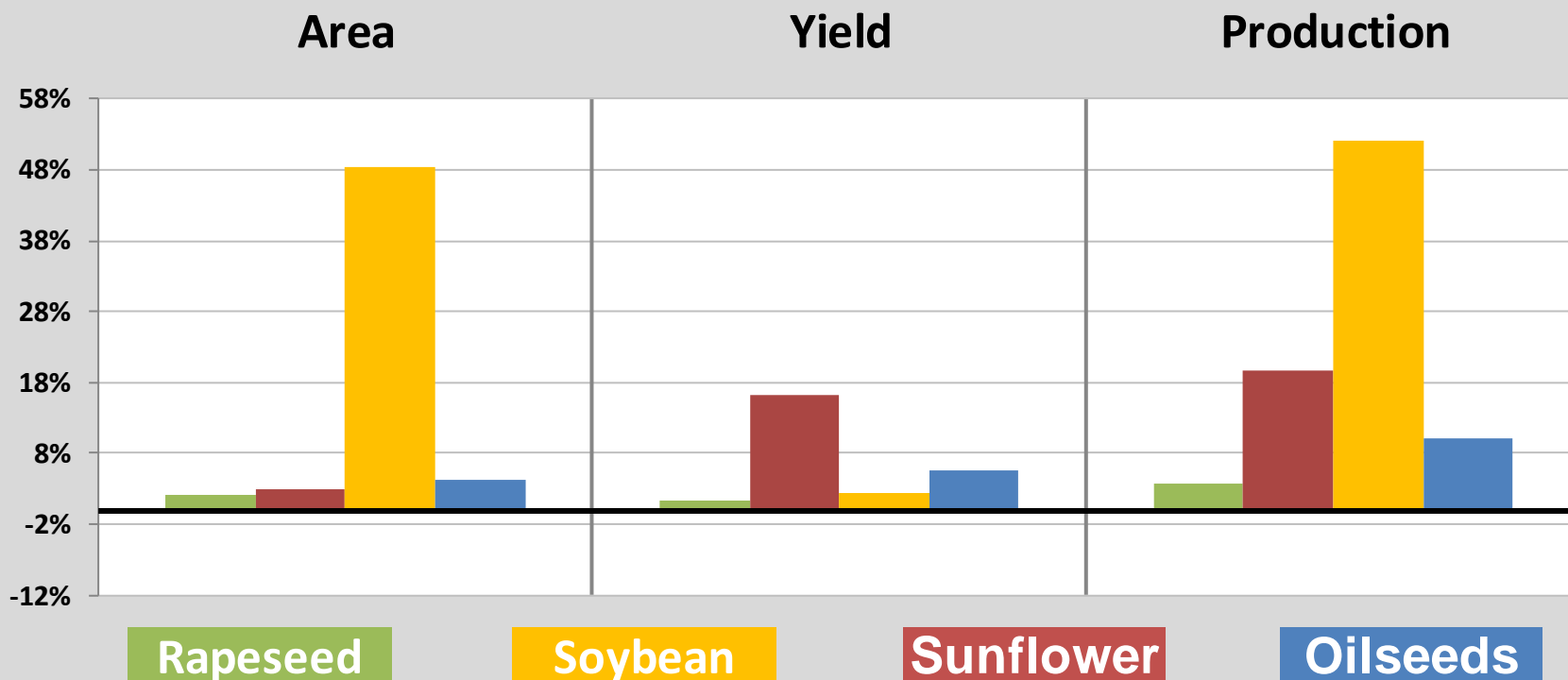
# Soybeans vs all other oilseeds

EU-28 Production  
5 year trimmed average (2012 - 2016)



# EU oilseeds production 2017/18: 35 million tonnes +10% vs 5Y-TrimAvg

2017/18 vs 5Y-trimmed average



# EU Oilseeds and Protein Crops Production: Recovery and a good year in 2017/18

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 October 2017	2017/18 November 2017	%change 2016/17	%change 5yrs trimmed
Rapeseed	20.9	20.1	22.3	21.7	8.3	3.7
Sunflower	8.6	8.5	9.2	10.2	20.0	19.7
Soja	1.8	2.5	2.7	2.7	10.4	52.1
Linseed	0.1	0.1	0.1	0.1	1.8	7.4
<b>TOTAL</b>	<b>31.5</b>	<b>31.2</b>	<b>34.3</b>	<b>34.9</b>	<b>11.7</b>	<b>10.8</b>

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 October 2017	2017/18 November 2017	%change 2016/17	%change 5yrs trimmed
Field peas	1.6	2.3	2.8	2.7	19.7	71.1
Broad beans	1.4	1.9	2.1	2.0	6.6	45.6
Sweet lupins	0.2	0.3	0.3	0.3	-1.8	30.7
<b>TOTAL</b>	<b>3.2</b>	<b>4.4</b>	<b>5.2</b>	<b>5.0</b>	<b>12.7</b>	<b>57.2</b>



# **EU Oilseeds & Protein Production: Outlook**

**Oilseeds: will the recovery be sustainable?**

**Protein crops: room for more EU supply but  
which market demand?**

# EU net oilseeds trade: (very) low exports and (very) high imports

<b>2016/17</b>	<b>OILSEEDS</b>			
thousands tonnes	Rapeseed	Soyabean	Sunflower	Total
Exports	320	200	404	924
Imports	4,225	14,051	777	19,054
Balance	- 3,905	- 13,851	- 373	<b>- 18,130</b>
	<b>MEALS</b>			
	Rapeseed	Soyabean	Sunflower	Total
Exports	511	276	265	1,053
Imports	219	18,327	3,656	22,202
Balance	292	- 18,051	- 3,391	<b>- 21,149</b>
	<b>OILS</b>			
	Rapeseed	Soyabean	Sunflower	Total
Exports	344	902	454	1,700
Imports	153	287	1,673	2,112
Balance	191	615	- 1,219	<b>- 412</b>



# EU Oilseeds Trade: Outlook

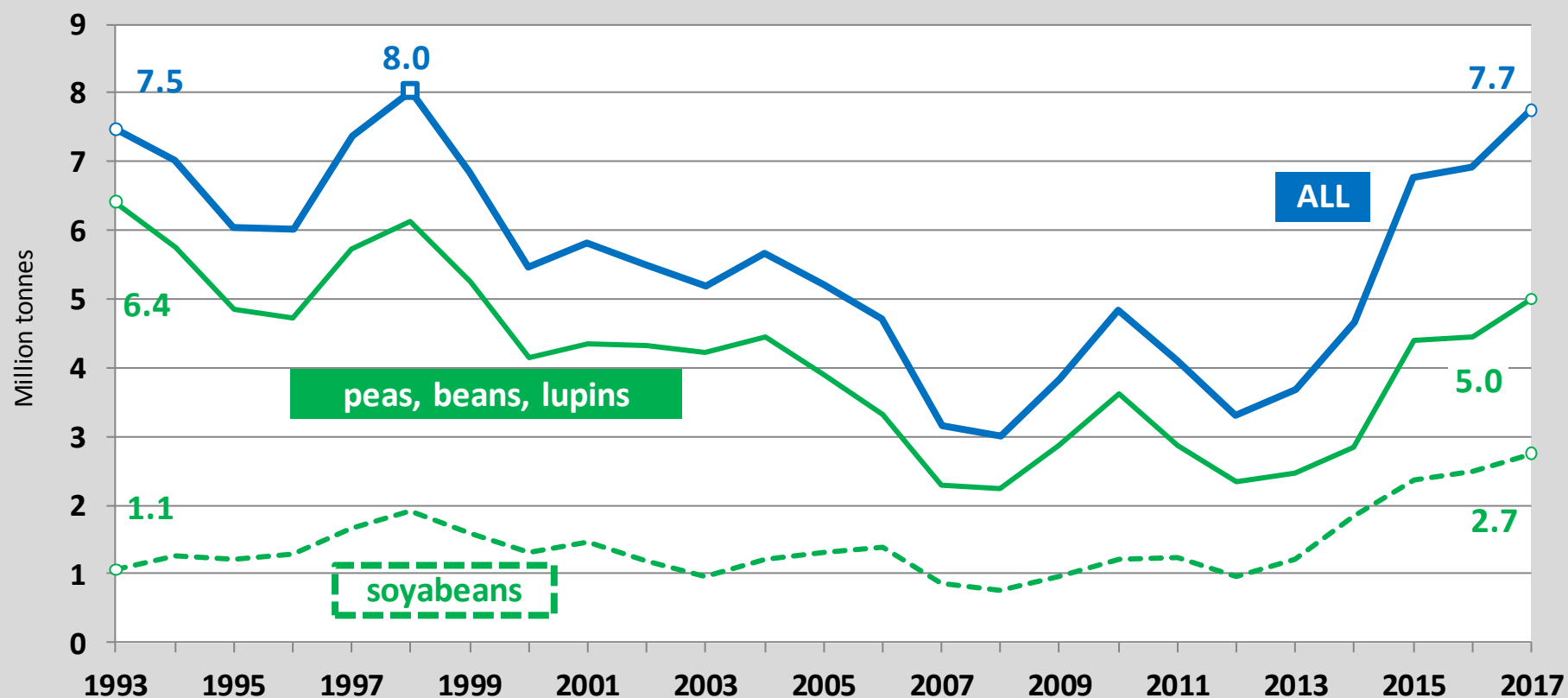
**Imports: more and more soya (and meals) to come (even if EU production goes up)?**

# EU Oilseeds Balance Sheet: EU supply dependent on imports

	2013/14	2014/15	2015/16	2016/17	2017/18
<b>Production</b>	<b>31 467</b>	<b>35 369</b>	<b>32 064</b>	<b>31 084</b>	<b>34 720</b>
Rapeseed	20 979	24 267	21 811	20 053	21 724
Soybean	1 216	1 834	2 371	2 488	2 748
Sunflower	9 272	9 268	7 882	8 542	10 249
<b>Domestic use</b>	<b>47 675</b>	<b>49 252</b>	<b>50 028</b>	<b>49 347</b>	<b>51 115</b>
Rapeseed	24 163	25 895	24 911	24 025	24 843
Soybean	14 689	14 409	17 061	16 473	16 129
Sunflower	8 823	8 949	8 055	8 849	10 143
<b>Imports</b>	<b>17 444</b>	<b>15 760</b>	<b>18 742</b>	<b>19 054</b>	<b>17 425</b>
Rapeseed	3 524	2 317	3 493	4 225	5 465
Soybean	13 577	13 190	14 784	14 051	13 606
Sunflower	344	254	465	777	354
<b>Exports</b>	<b>1 086</b>	<b>1 277</b>	<b>879</b>	<b>924</b>	<b>908</b>
Rapeseed	290	588	343	320	318
Soybean	54	116	144	200	119
Sunflower	742	573	392	404	472

# Protein Crops

## EU Protein crops & soybeans production



# EU Feed Protein Balance Sheet: 2016/17 version

## From Crops

- 18.30 million tonnes of crude protein
- 91% EU origin

## From Co-products

- 25.57 million tonnes of crude protein
- 38% EU origin

2016/17	Million tonnes						Million tonnes (crude protein)			
Protein source	Total EU production (A)	EU imports (B)	EU exports (C)	EU Total Domestic Use (D)	EU total feed use (E)	Feed use EU origin (F)	protein content (Feed use) (G)	EU total feed use (H) = (E) - (G)	Feed use EU origin (I) = (F) - (G)	% Feed Use of EU Origin (I / (H))
<b>CROPS</b>					<b>177,6</b>	<b>159,2</b>		<b>18,30</b>	<b>16,60</b>	<b>91%</b>
<b>CEREALS (of which)</b>	<b>294,2</b>	<b>19,4</b>	<b>38,1</b>	<b>281,3</b>	<b>172,9</b>	<b>154,6</b>		<b>17,03</b>	<b>15,39</b>	<b>90%</b>
Common Wheat	133,7	3,3	25,1	115,7	52,4	49,1	11,0%	5,76	5,40	
Durum Wheat	9,2	1,7	1,4	9,4	0,8	0,8	12,0%	0,10	0,09	
Barley	59,6	0,4	8,8	52,8	41,2	41,2	10,0%	4,12	4,12	
Grain Maize	60,8	13,6	2,6	69,5	52,8	40,5	8,0%	4,22	3,24	
Rye	7,3	0,0	0,1	7,4	2,3	2,3	11,0%	0,25	0,25	
Sorghum	0,7	0,2	0,0	0,9	0,7	0,5	11,0%	0,08	0,06	
Oats	7,9	0,0	0,2	9,0	7,3	6,4	11,0%	0,80	0,71	
Triticale	11,5	0,0	0,0	12,1	11,0	10,5	11,0%	1,21	1,16	
Other cereals	3,4	0,2	0,0	4,7	4,5	3,3	11,0%	0,50	0,36	
<b>OILSEEDS (feed use without crushing)</b>	<b>31,0</b>	<b>19,5</b>	<b>0,9</b>	<b>49,8</b>	<b>1,8</b>	<b>1,8</b>		<b>0,50</b>	<b>0,50</b>	<b>100%</b>
(columns (E) and (F))										
Soybeans	2,5	14,0	0,2	16,4	1,2	1,2	33,0%	0,40	0,40	
rapeseed	20,1	4,7	0,3	24,6	0,5	0,5	18,8%	0,08	0,08	
Sunflowerseed	8,5	0,8	0,4	8,8	0,2	0,2	15,4%	0,02	0,02	
<b>PULSES (of which)</b>	<b>4,4</b>	<b>0,3</b>	<b>1,1</b>	<b>3,6</b>	<b>3,0</b>	<b>2,8</b>		<b>0,77</b>	<b>0,71</b>	<b>93%</b>
Field Peas	2,3	0,1	0,7	1,7	1,3	1,3	22,5%	0,29	0,29	
Broad beans	1,9	0,0	0,4	1,5	1,3	1,3	26,0%	0,33	0,33	
Lupins	0,3	0,1	0,0	0,4	0,4	0,3	35,0%	0,15	0,10	
<b>CO-PRODUCTS</b>					<b>84,1</b>	<b>44,6</b>		<b>25,57</b>	<b>9,77</b>	<b>38%</b>
<b>SOYBEAN MEALS (of which)</b>					<b>29,4</b>	<b>1,5</b>		<b>13,4</b>	<b>0,7</b>	<b>5%</b>
Soybean meal (from EU soybean production)	1,6		0,0	1,5	1,5	1,5	43,0%	0,65	0,65	
Soybean meal (imported soybeans crushing)	9,6		0,2	9,2	0,0	0,0	45,5%	4,19	0,00	
Soybean meal (traded as such)		18,3		18,3	0,0	0,0	45,5%	8,34	0,00	
Soybean Protein Concentrate	0,3			0,3	0,0	0,0	62,5%	0,19	0,02	
<b>RAPESEED MEALS (of which)</b>					<b>13,2</b>	<b>10,4</b>		<b>4,4</b>	<b>3,4</b>	<b>79%</b>
Rapeseed meal (from EU rapeseed production)	10,9		0,5	10,4	10,4	10,4	33,0%	3,43	3,43	
Rapeseed meal (imported rapeseed crushing)	2,6			2,6	0,0	0,0	33,0%	0,86	0,00	
Rapeseed meal (traded as such)		0,2		0,2	0,0	0,0	33,0%	0,07	0,00	
<b>SUNFLOWER MEALS (of which)</b>					<b>7,7</b>	<b>3,6</b>		<b>2,4</b>	<b>1,0</b>	<b>42%</b>
Sunflower meal (from EU sunflowerseed production)	3,9		0,3	3,6	3,6	3,6	28,0%	1,02	1,02	
Sunflower meal (imported sunflowerseed crushing)	0,4			0,4	0,0	0,0	35,0%	0,13	0,00	
Sunflower meal (traded as such)		3,7		3,7	0,0	0,0	35,0%	1,28	0,00	
<b>OTHERS (excluding on-farm use)</b>					<b>33,9</b>	<b>29,0</b>		<b>5,4</b>	<b>4,7</b>	<b>86%</b>
of which										
Painkern meal	0,0	2,1	0,0	2,1	2,1	0,0	16,0%	0,33	0,00	
Other oilseed meals	0,6	0,0	0,0	0,6	0,6	0,6	37,0%	0,22	0,22	
Corn Germ meal	0,4	0,0	0,0	0,4	0,4	0,4	26,0%	0,11	0,11	
Corn Gluten Meal					0,1	0,1	60,0%	0,06	0,06	
Corn Gluten Feed	3,0	0,3	0,2	3,1	3,1	3,0	19,0%	0,60	0,57	
Distiller's Dried Grains with Solubles	3,7	1,0	0,2	4,5	4,5	3,7	30% for wheat 27% for corn	1,3	1,0	
Wet Distillers Grain					n.a.	n.a.				
Wheat bran	8,4	0,0	0,0	8,4	8,4	8,4	15,5%	1,30	1,30	
Wheat gluten feed					0,4	0,4		0,00	0,00	
Citrus pulp	0,0	0,2	0,0	0,2	0,0	0,0	7,5%	0,01	0,00	
Beet pulp pellets	5,1	1,2	0,1	6,1	5,1	5,1	7,5%	0,46	0,38	
Molasses	5,6	1,5	0,1	6,9	2,8	2,2	10,5% beet 4% cane	0,26	0,23	
Processed Proteins (potatoes)					0,2	0,2	12,0%	0,02	0,02	
Dried Fodder	3,3	0,0	1,6	1,6	1,6	1,6	17,0%	0,28	0,28	
Former Foodstuff					5,0	5,0	8,8%	0,44	0,44	
<b>OTHER SOURCES</b>					<b>2,3</b>	<b>2,2</b>		<b>0,92</b>	<b>0,86</b>	<b>94%</b>
(excluding on-farm use)										
Processed Animal Proteins							58% for pork 63% for	0,38	0,38	
Fish Meal	0,5	0,3	0,2	0,6	0,6	0,6	66,0%	0,36	0,31	
Whey Powder					0,9	0,9	12,5%	0,11	0,11	
Skimmed Milk Powder	1,6		0,6	1,0	0,2	0,2	34,0%	0,06	0,06	



**Thank you for your attention!**

**More information on  
EU Crops Market Observatory:**

**[https://ec.europa.eu/agriculture/market-observatory\\_en](https://ec.europa.eu/agriculture/market-observatory_en)**