

Civil Dialogue Group RICE

15th April 2016

EU RICE MARKET

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European Commission
DG AGRI**



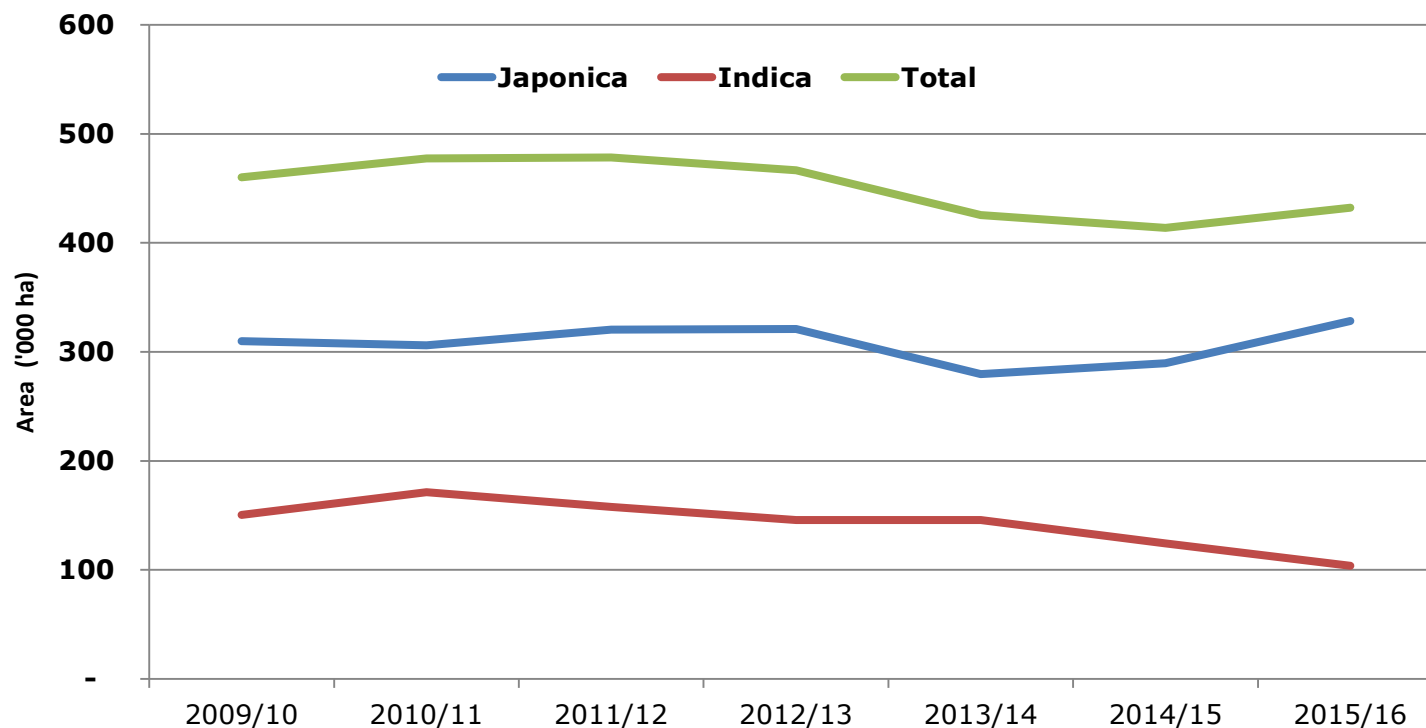
Contents

1. EU Rice Production 2015/16

2. EU Rice Trade 2015/16 (imports/exports)

3. EU Rice Market – update Q1-2016

EU Rice Area: + 5.5% increase in 2015

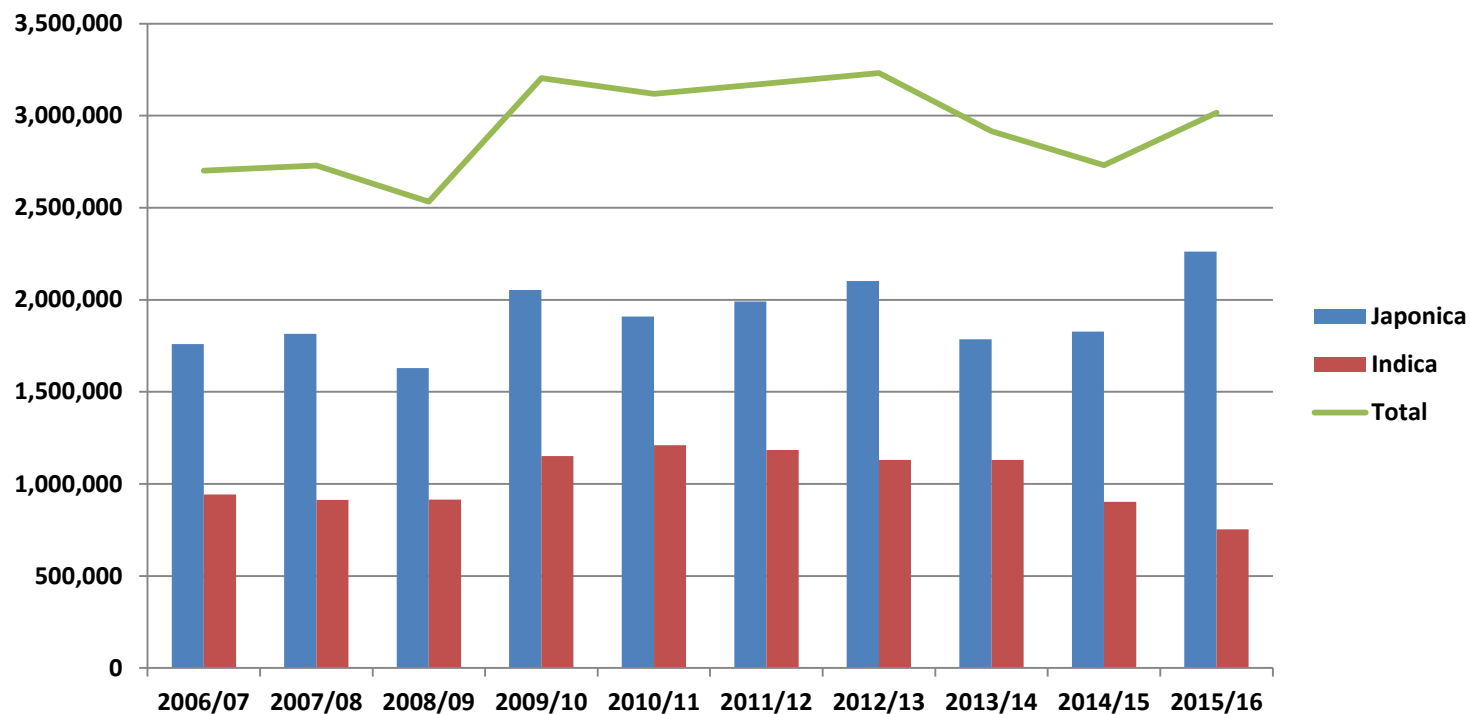


Total EU Rice Area 2015: 435 810 ha (+ 5.5% vs 2014)

First increase in 4 years

Contrast between Japonica (+18%) and Indica (-15%)

EU Rice Production: + 10.5% increase in 2015



Production 2015 : 3 Million tonnes paddy (+10.5%)

First increase in 4 years

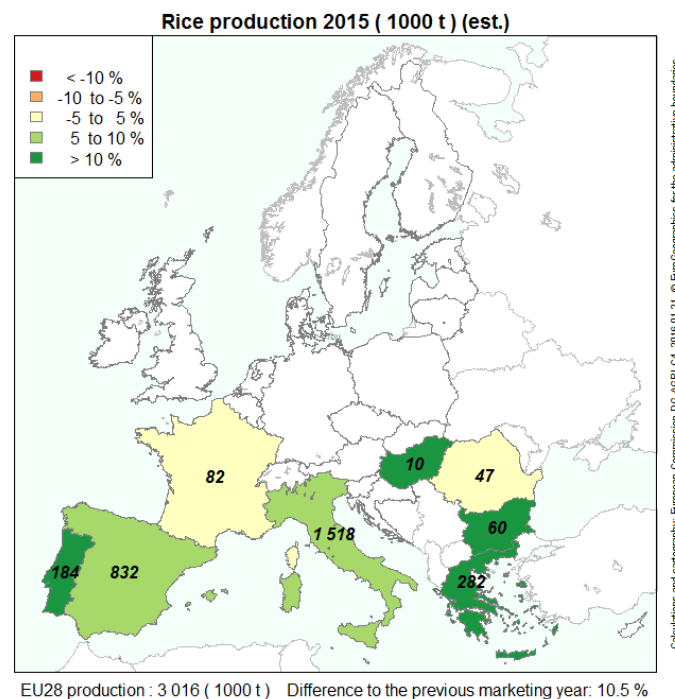
75% Japonica – 25% Indica

EU Total Rice Production 2015: + 10.5%

2015 EU paddy rice production:

3 016 000 tonnes (+10.5%)

**Strong or very strong increase in
6 out of 8 rice producing MS**

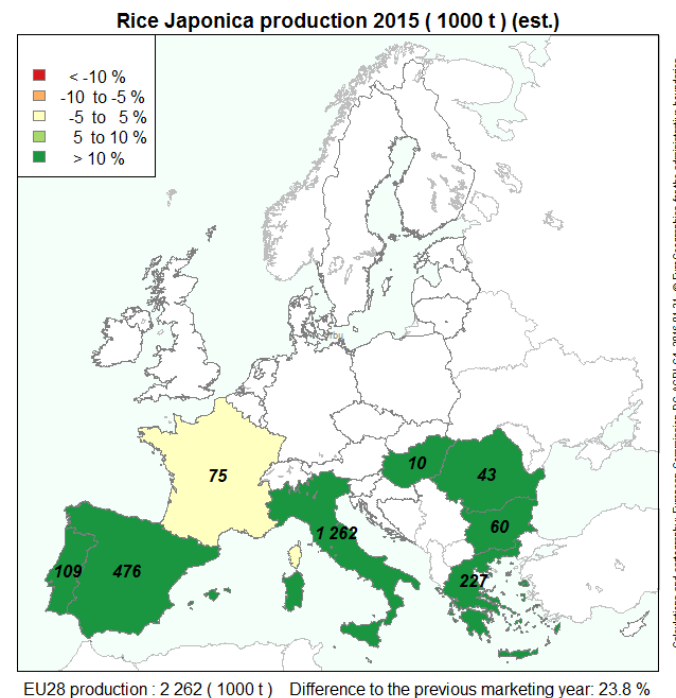


EU Japonica Rice Production 2015: + 24%

2015 EU Japonica paddy production

2 262 000 tonnes (+24%)

**Very strong increase in 7 out of 8
producing Member States**

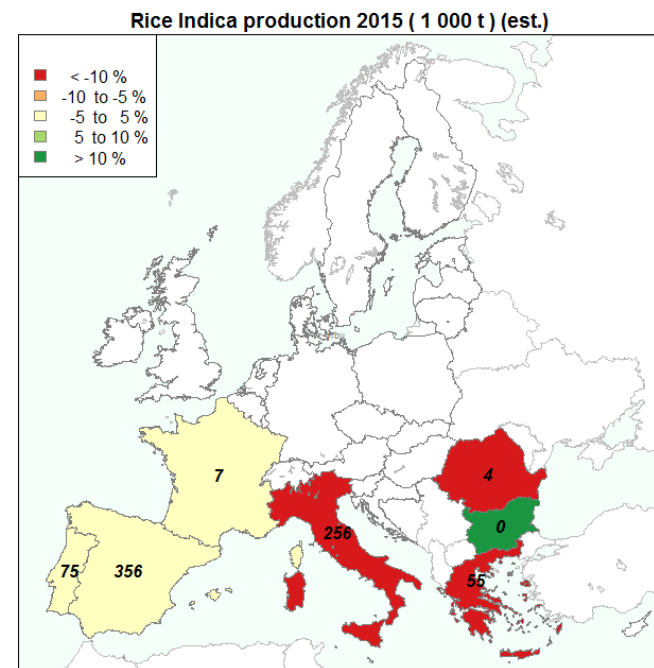


EU Indica Rice Production 2015: -16.5%

2015 EU Indica paddy production :

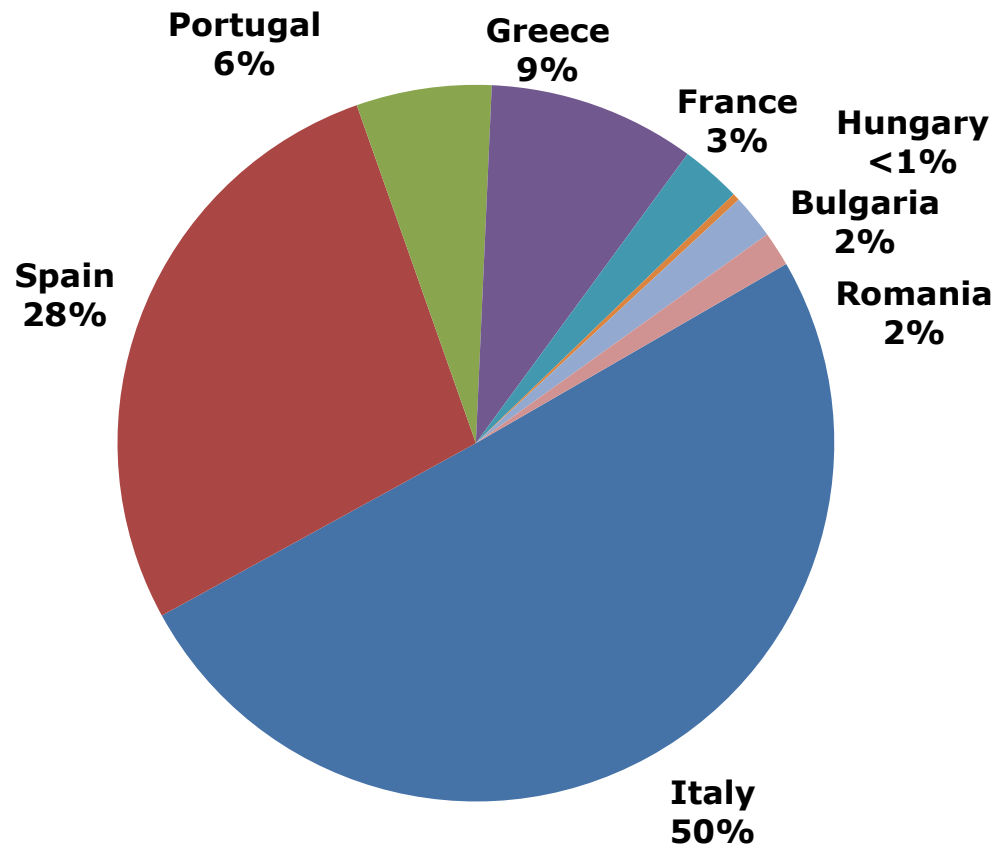
754 000 tonnes (-16.5%)

**Very strong decrease in 3 out of 7
producing Member States**



EU28 production : 754 (1000 t) Difference to the previous marketing year : -16.5 %

2015 EU Rice Production / Member State



**Production 2015 : 3 Million tonnes paddy
(1,7 Million tonnes in milled eq.)**
Market switch: 75% Japonica – 25% Indica

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1. EU Rice Production 2015/16

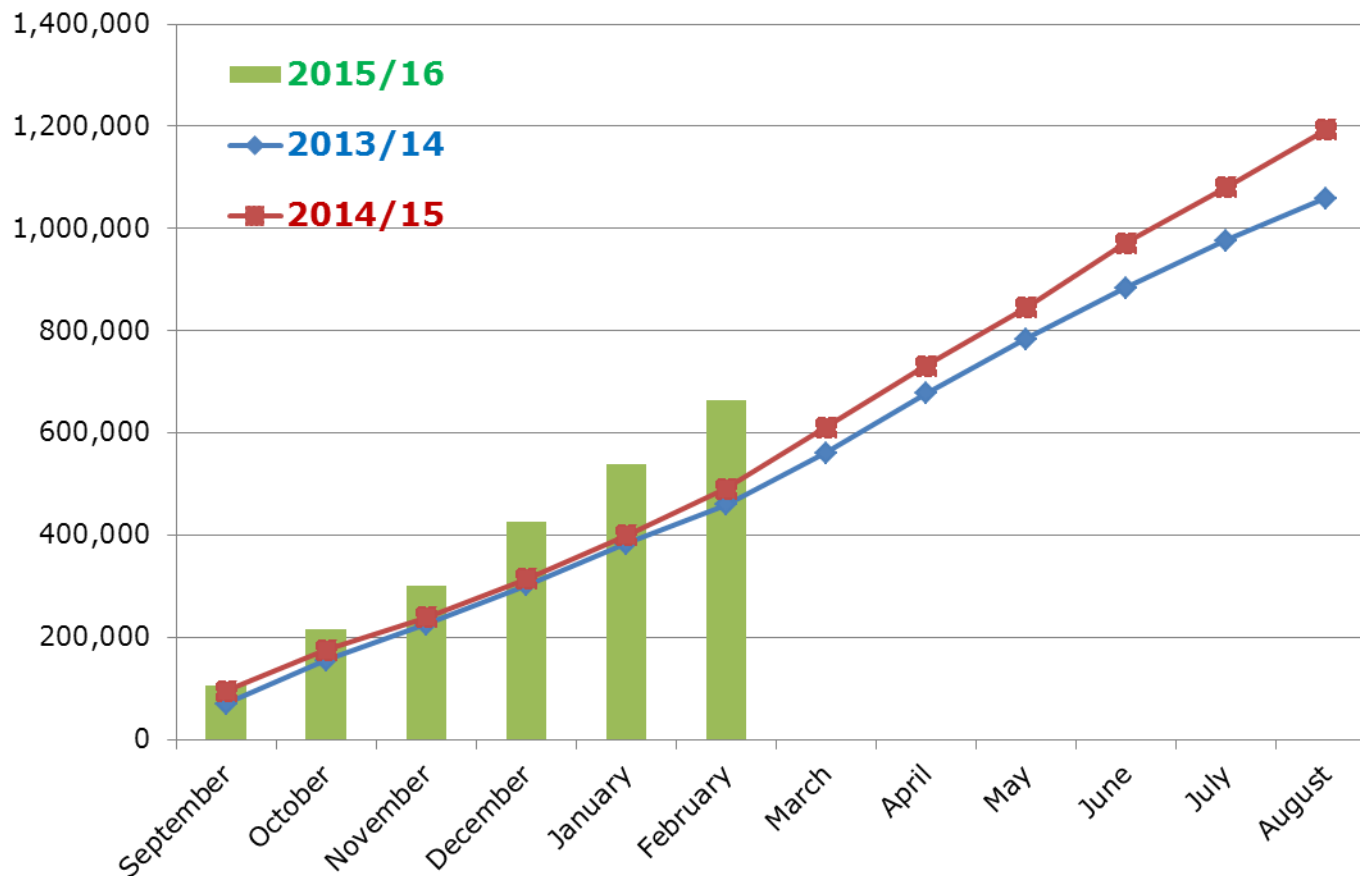
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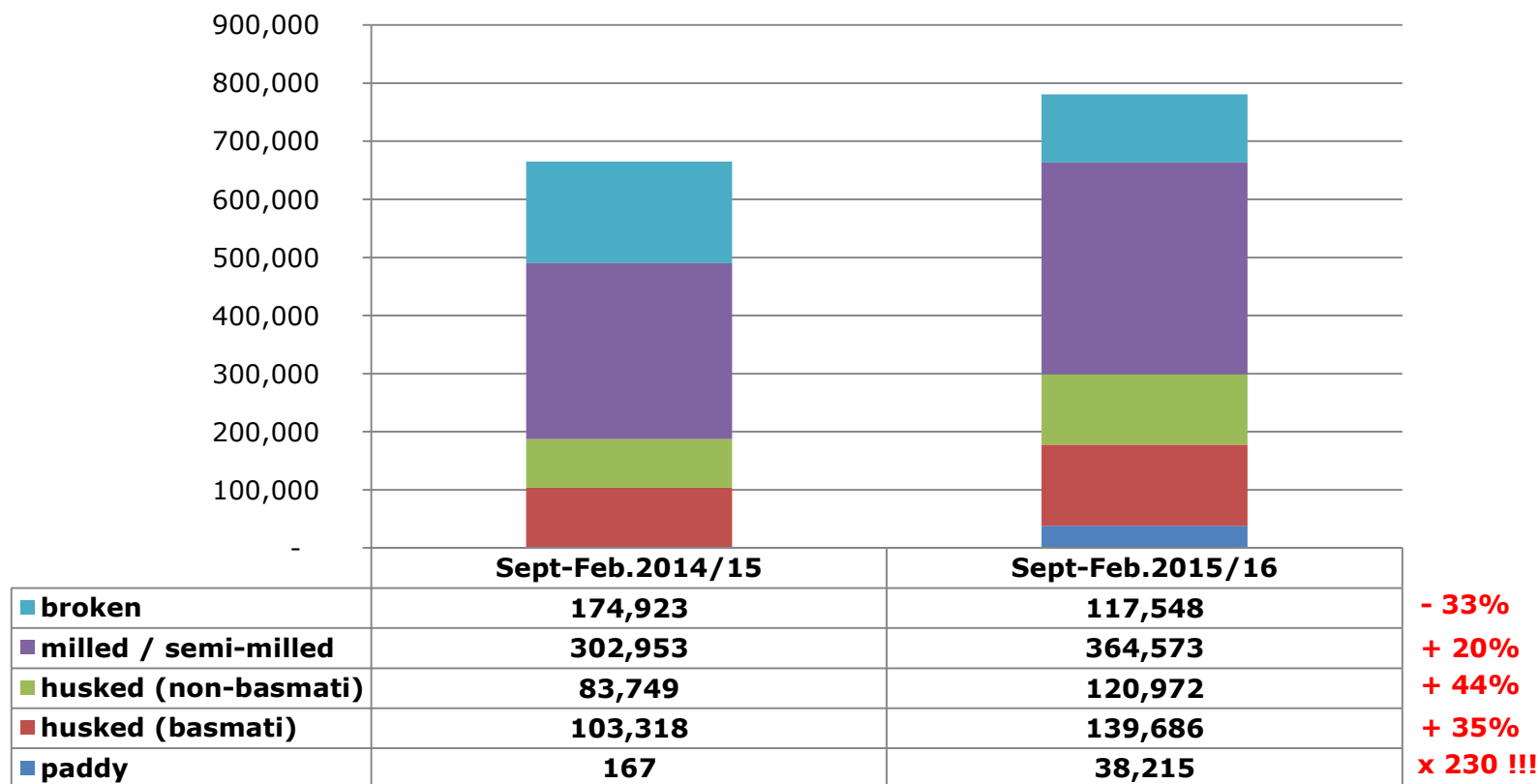
Total EU Rice Imports - Overview

2014/15 Record : 1.193 Mio T milled eq., excl. broken

6 months of MY 2015/16: 663 400 t (+ 35% vs 2014/15)



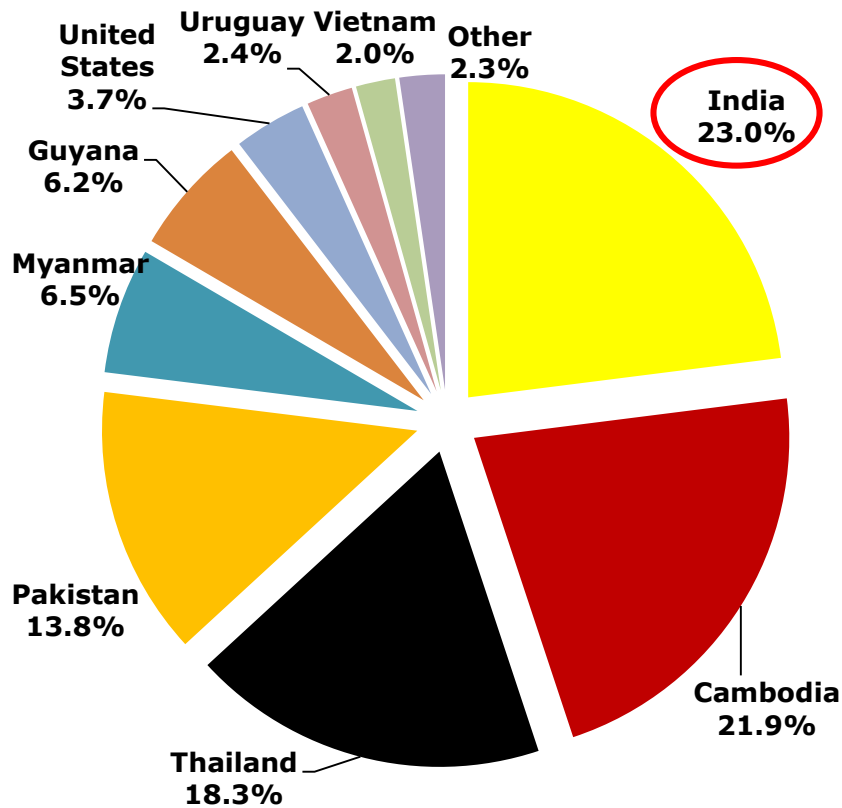
Total EU Rice Imports – first 6 months MY 2015-16: UP



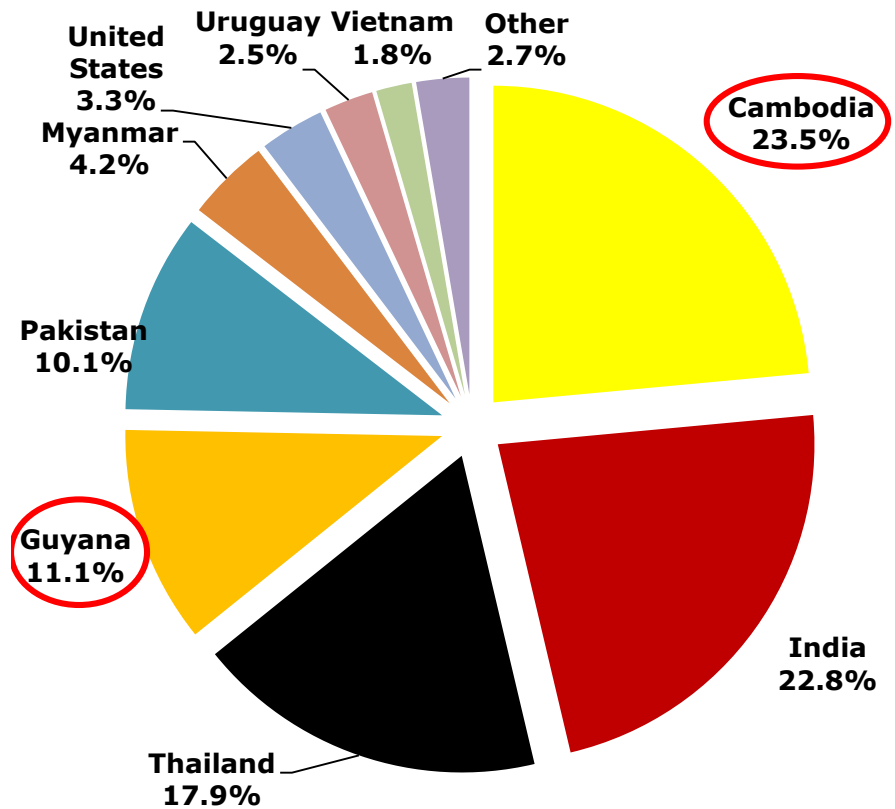
In milled equivalent - source: Comext for Sept.2015-Jan. 2016, Surveillance 2 for Feb. 2016

Total EU Rice Imports - Origin

MY 2014/15: 1.193 Mio t
(milled eq, excl. broken)

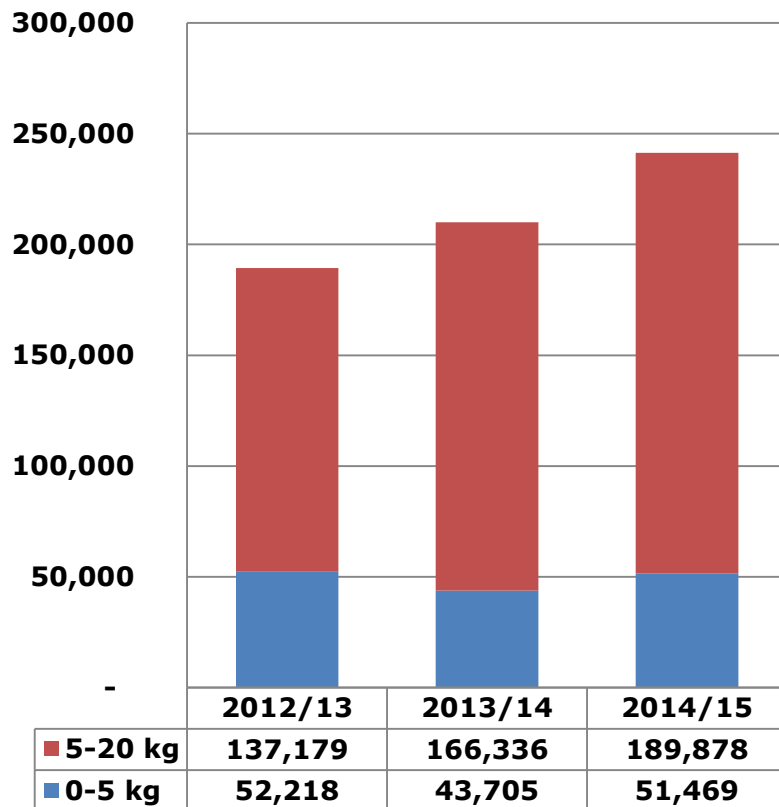


6 months MY 2015/16:
663 500 tonnes
(milled eq, excl. broken)

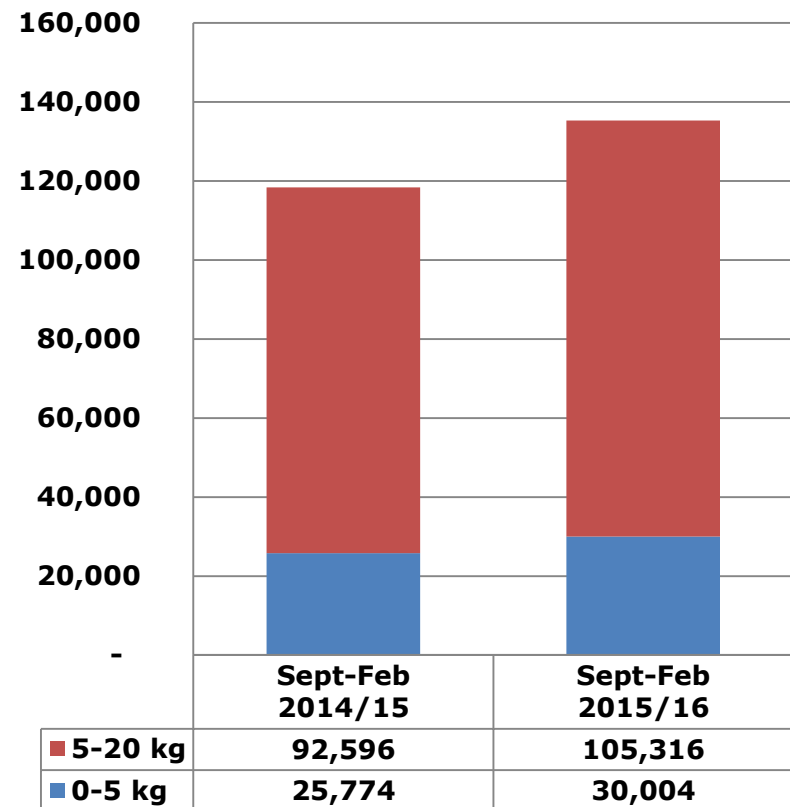


EU Rice Imports – Small packages (< 20kg)

**MY 2014/15: 241 099 t
(+15% vs 2013/14)**



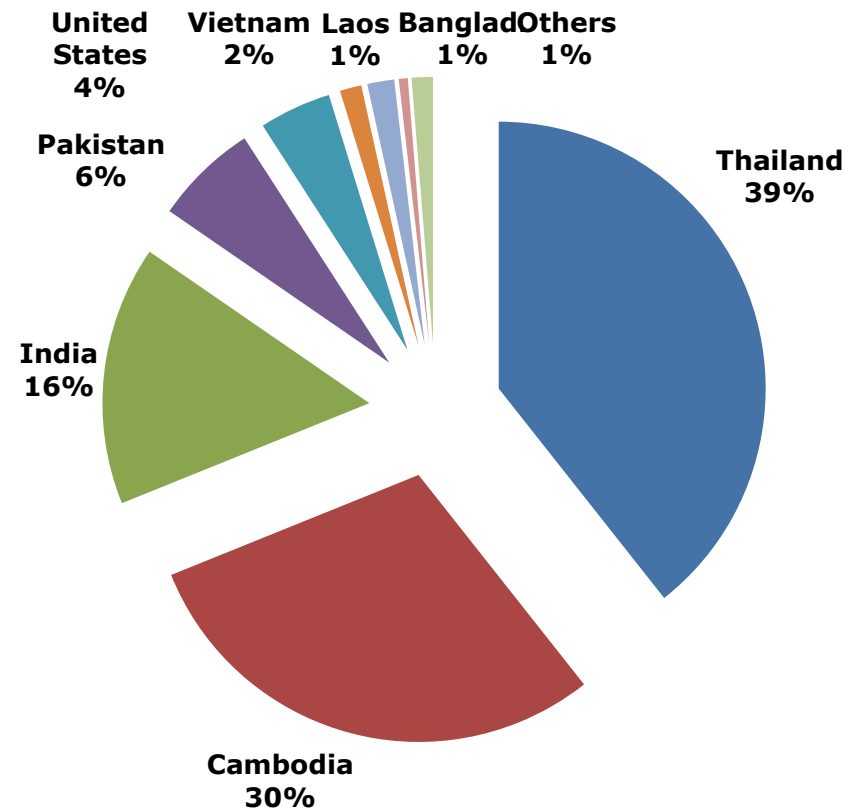
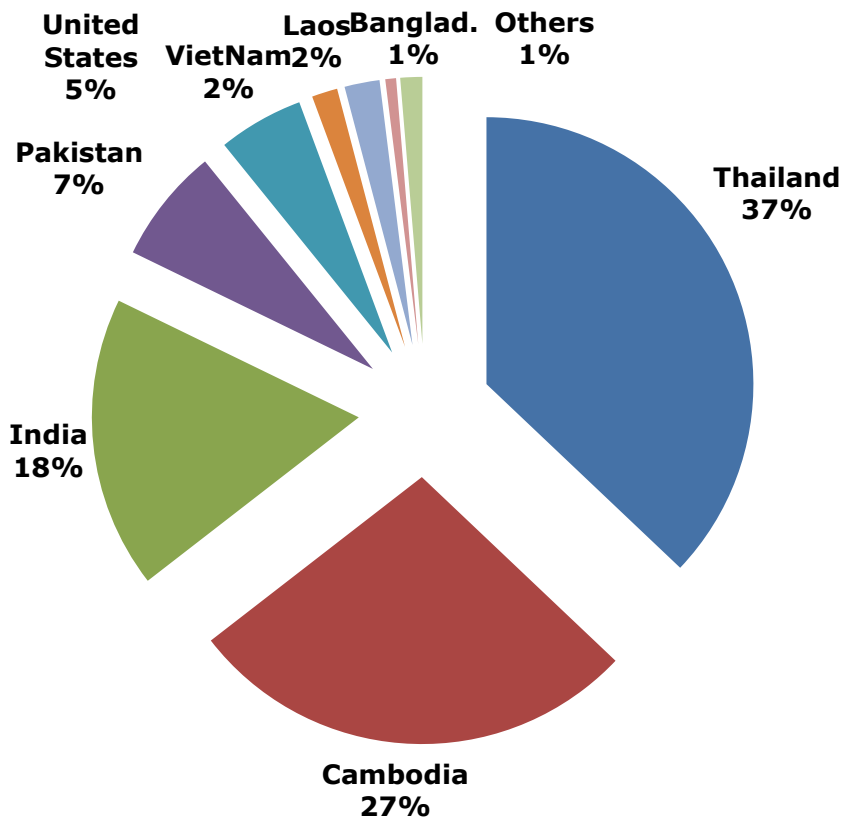
**First 6 months MY 2015/16:
135 320 t (+14% vs 2014/15)**



EU Rice Small Packages Imports - Origin

MY 2014/15: 241 099 t

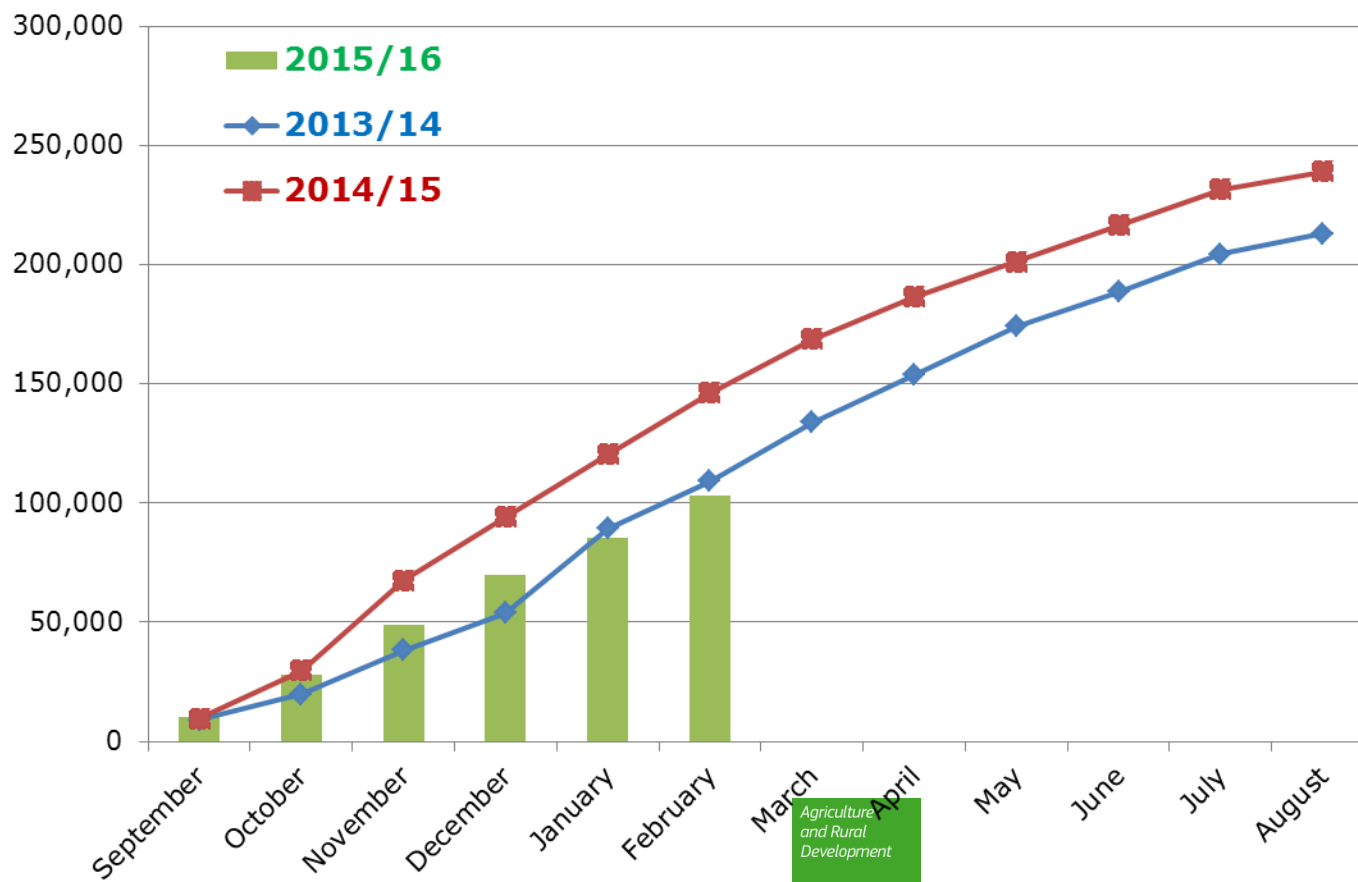
**6 months MY 2015/16:
135 320 t**



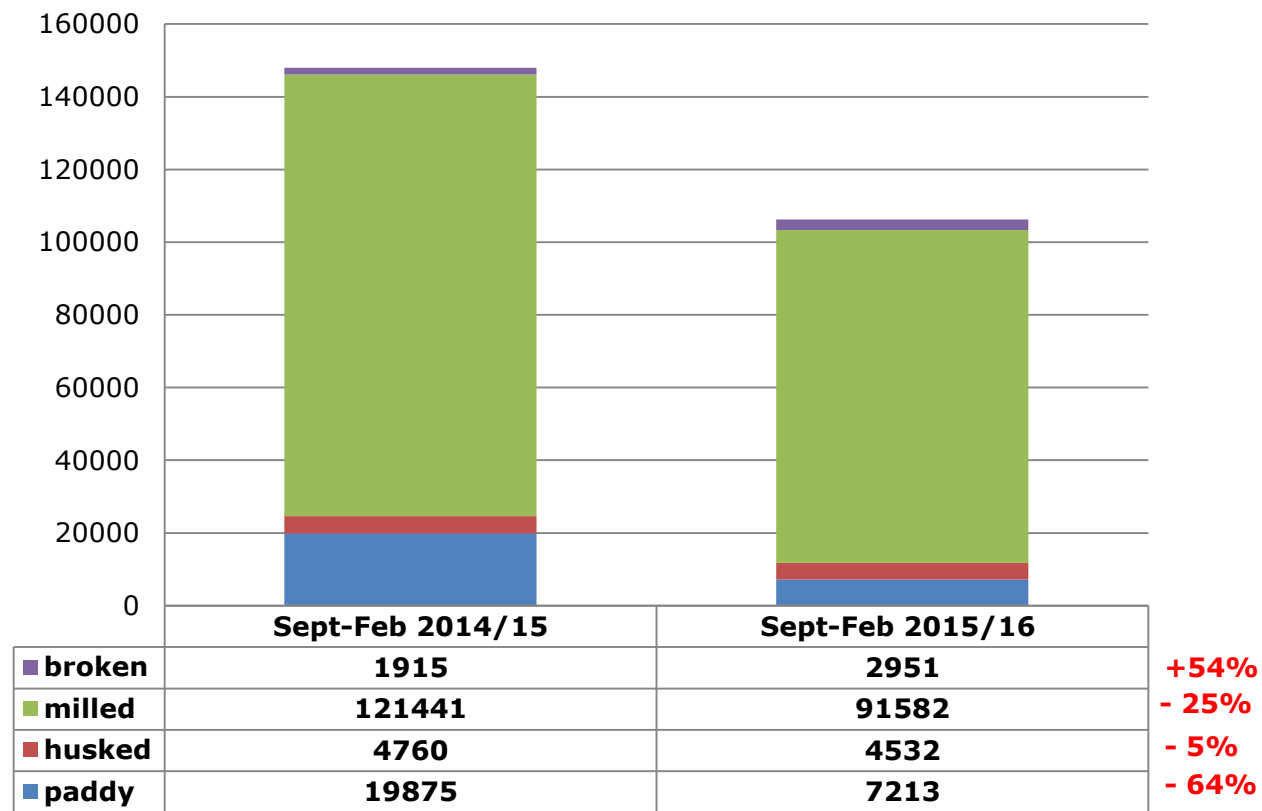
Total EU Rice Exports - Overview

2014/15 Record : 238 881 t milled eq., excl. broken

6 months of MY 2015/16: 103 327 t (- 29% vs 2014/15)



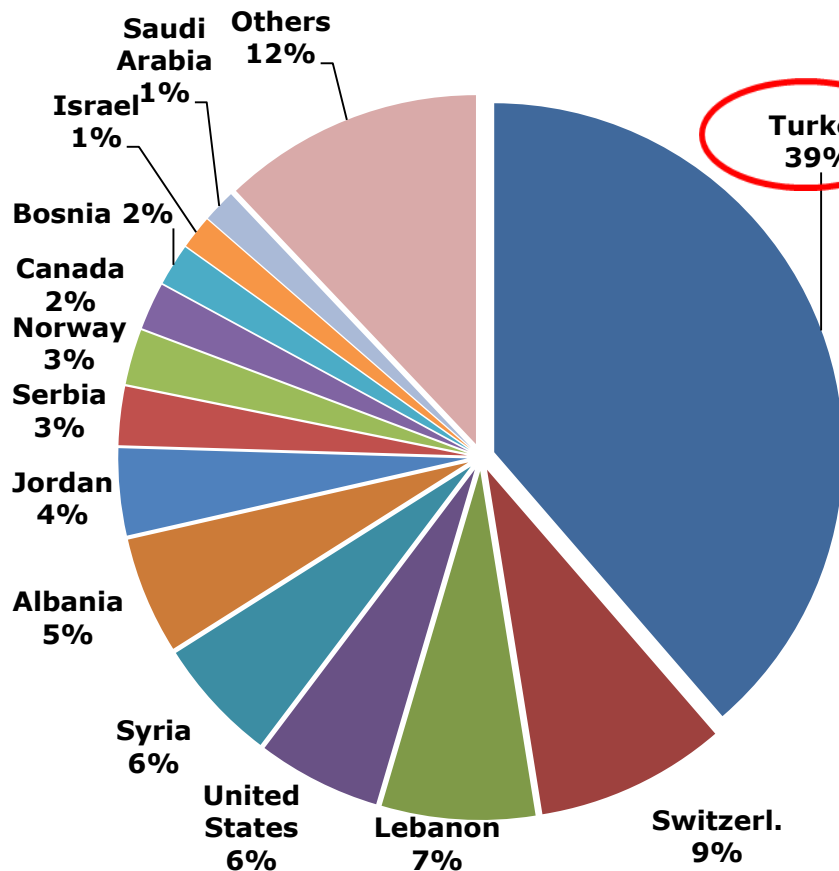
Total EU Rice Exports – first 6 months MY 2015-16: DOWN



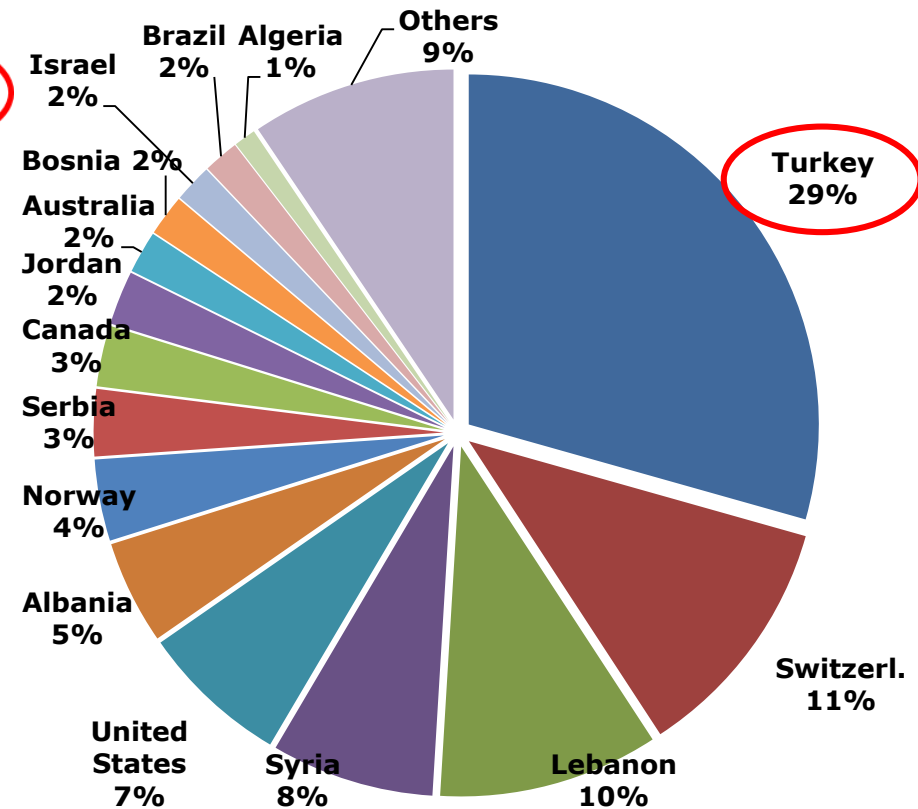
In milled equivalent - source: Comext for Sept.2015-Jan. 2016, Surveillance 2 for Feb. 2016

Total EU Rice Exports - Destination

MY 2014/15: 238 881 t
(milled eq, excl. broken)



**6 months MY 2015/16:
103 327 tonnes**
(milled eq, excl. broken)



Customs Codes for Rice

On-going discussions between Commission services and MS in Customs Code Committee about:

- 1. Deletion** of existing codes for **parboiled paddy** (4 codes at 8 digit level involved)
- 2. Merger** of existing codes for **small packets** 0-5 kg and 5-20 kg into codes for a single category of small packets 0-20 kg (32 codes at 10 digit level involved)
- 3. Creation** of new codes specific to **aromatic/fragrant rice** in addition to existing ones on Basmati (22 codes at 10 digit level involved)

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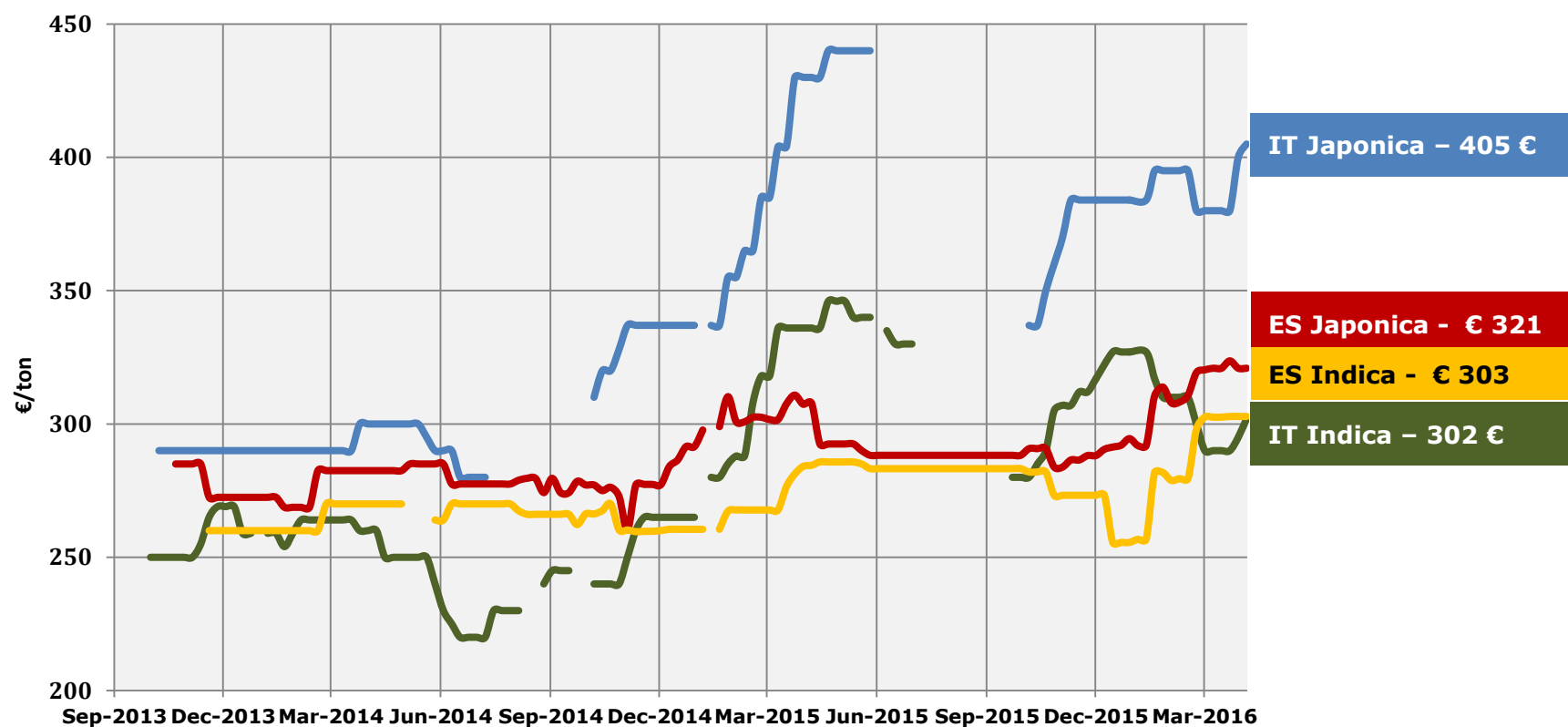
1. EU Rice Production 2015/16
2. EU Rice Trade 2015/16 (imports/exports)
- 3. EU Rice Market – update Q1-2016**

EU Rice Balance Sheet – March 2016

	2014/15 FINAL			2015/16 est		
	Japonica	Indica	TOTAL	Japonica	Indica	TOTAL
Beginning stocks						
<i>Private</i>	191	281	471	157	283	441
<i>Intervention</i>	-	-	-	-	-	-
Total beginning stocks	191	281	471	157	283	441
Usable production	1,089	548	1,637	1,322	449	1,772
<i>Area ('000 ha)</i>	290	124	414	334	102	436
<i>Agronomic yield (t/ha, on paddy basis)</i>	6.3	7.3	6.6	6.8	7.4	6.9
<i>Milling yield (%)</i>	60%	61%	60%	58%	60%	59%
Imports (from third countries)	118	1,075	1,193	90	1,260	1,350
TOTAL SUPPLY	1,398	1,903	3,302	1,570	1,992	2,562
Domestic uses						
<i>Human consumption / Industrial uses / Animal feed</i>	993	1,583	2,576	1,051	1,638	2,689
<i>Seed ***</i>	34	12	47	39	10	49
Total domestic uses	1,028	1,595	2,622	1,090	1,648	2,738
Exports (to third countries)	213	26	239	170	30	200
TOTAL USE	1,241	1,620	2,861	1,260	1,678	2,938
Final stocks ****						
<i>Private</i>	157	283	441	310	314	624
<i>Intervention</i>	-	-	-	-	-	-
Total final stocks	157	283	441	310	314	624
Change in stocks	-34	3	-31	152	31	184
Change in public stocks	-	-	-	-	-	-

2015/16 est.: Higher imports - Lower exports - Higher final stocks

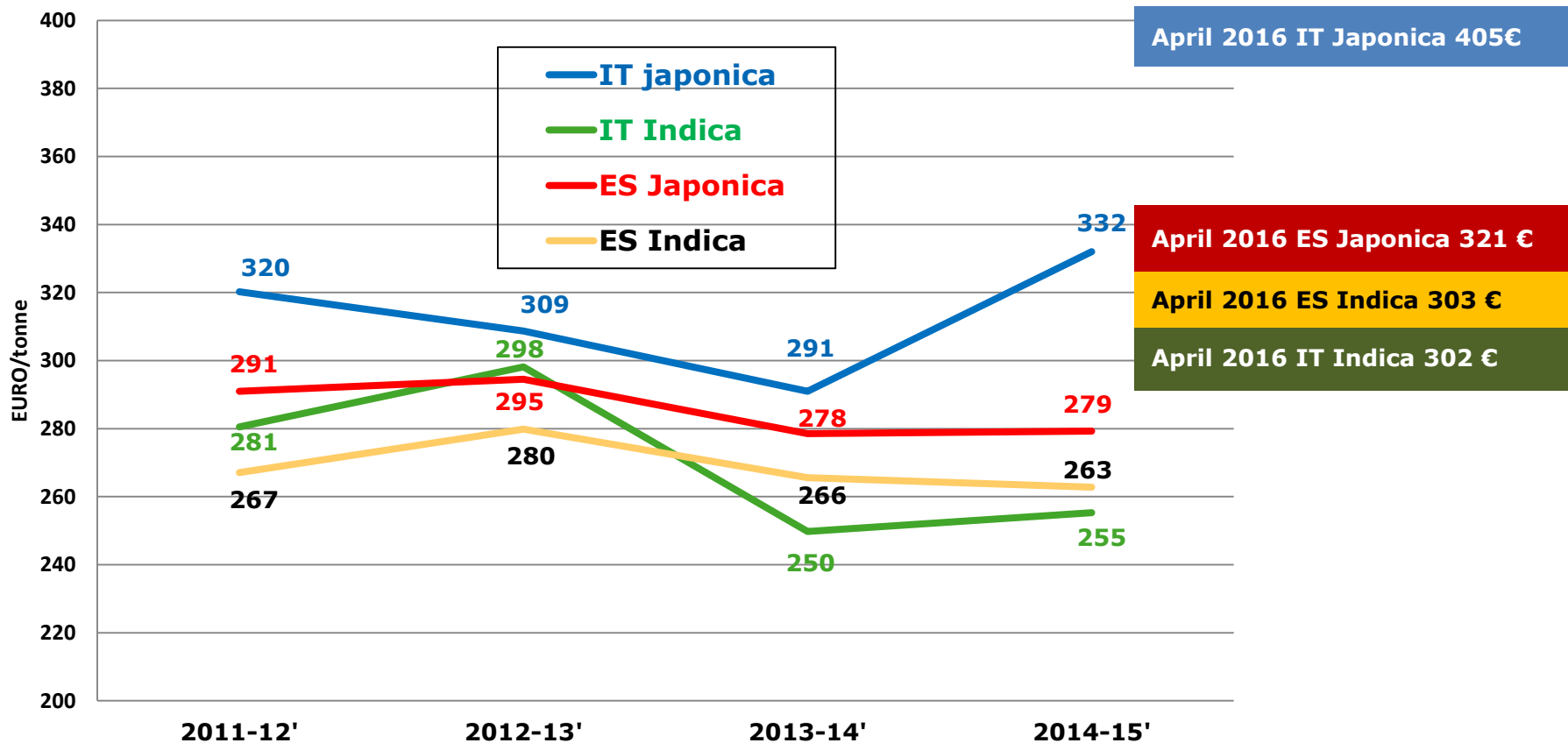
EU Rice Prices: recovery in H1-2015 and overall stable since



Source: MS notifications

IT Japonica: Selenio – IT Indica: Thaibonnet

EU Rice Prices: higher in Q1-2016 than in previous years



IT Japonica: Selenio, IT Indica: Thaibonnet



Conclusions

- **EU Rice Market 2015:**
 - **EU paddy prices recovery** (tight supply/demand early 2015)
 - **Good year for EU rice production** : high area + good yields; sharp contrast Japonica (+24%) – Indica (-17%)
 - **Record year for EU rice trade** (record imports of Indica, record exports of Japonica)
- **EU Rice Market Q1-2016:**
 - **EU rice trade: imports up, exports down**
 - **Supply: high** (Japonica: high production, Indica: high imports)
 - **Demand: to be seen** (in particular Japonica exports)
 - **Prices:** still stable



Thank you for your attention

More information at:

http://ec.europa.eu/agriculture/cereals/index_en.htm