European Commission

Cereals, Oilseeds and Protein Crops

Arable Crops Market Situation

Civil Dialogue Group
25 November 2019

Agriculture and Rural Development

European
Commission

Cereals

2019/20 Marketing Year

Cereals

European Commission

EU 28- 2019 Area Forecast

EVOLUTION OF THE EU CEREALS AREA					
Million ha	2017	2018	2019 Sept fcst	2019 Oct fcst	% change 2018/2019
TOTAL	**55,2**	**55,1**	**56,5**	**56,6**	2,8
Soft wheat	23,4	23,0	23,9	23,9	3,8
Durum wheat	2,5	2,5	2,3	2,3	-6,7
Barley	12,0	12,3	12,2	12,2	-0,4
Maize	8,3	8,3	8,8	8,9	6,7
Rye	2,0	1,9	2,2	2,2	14,2
Oats	2,7	2,8	2,7	2,7	-3,7

Sources : DG AGRI - G4

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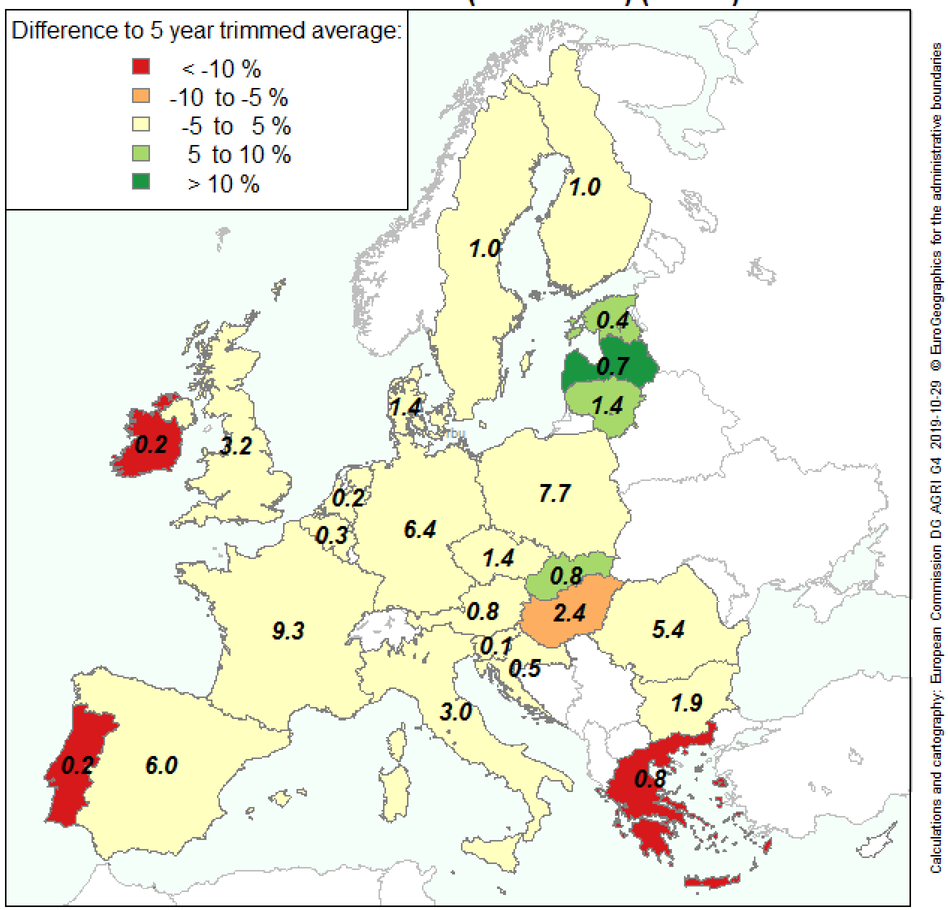
2019-20 MY vs 5Y average

All cereals area 2019 (million ha) (f'cast.)



EU28 area : 56.5 (million ha)   Difference to 5 year trimmed average: 0 %

EU 28- 2019 Production Forecasts

EVOLUTION OF THE EU CEREALS USABLE PRODUCTION					
Million tonnes	2017/2018	2018/2019	2019/2020 Sept fcst	2019/2020 Oct fcst	% change 2018/2019
TOTAL	**305,3**	**290,2**	**312,3**	**315,6**	8,8
Soft wheat	142,0	128,5	145,0	147,0	14,4
Durum wheat	8,7	8,7	7,8	7,8	-10,3
Barley	58,3	56,0	61,4	62,4	11,4
Maize	64,8	69,1	66,5	66,6	-3,6
Rye	7,2	6,1	8,2	8,3	36,1
Oats	8,1	7,7	7,7	7,7	0,0

Sources : DG AGRI - G4

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EU 28- 2019 Production Forecasts

2019/2020 Marketing Year *usable production*

Million tonnes	**EC DG AGRI 28-nov**	Stratégie Grain 14-nov	ADM 30-oct	COCERAL 19-sept
Total	**315,6**	308,7	308,8	304,9
Soft Wheat	**147,0**	145,5	145,3	143,3
Durum Wheat	**7,8**	7,6	7,7	8,0
Barley	**62,4**	61,6	62,0	60,8
Maize	**66,6**	63,5	63,5	61,6
Rye	**8,3**	7,5	8,2	7,8

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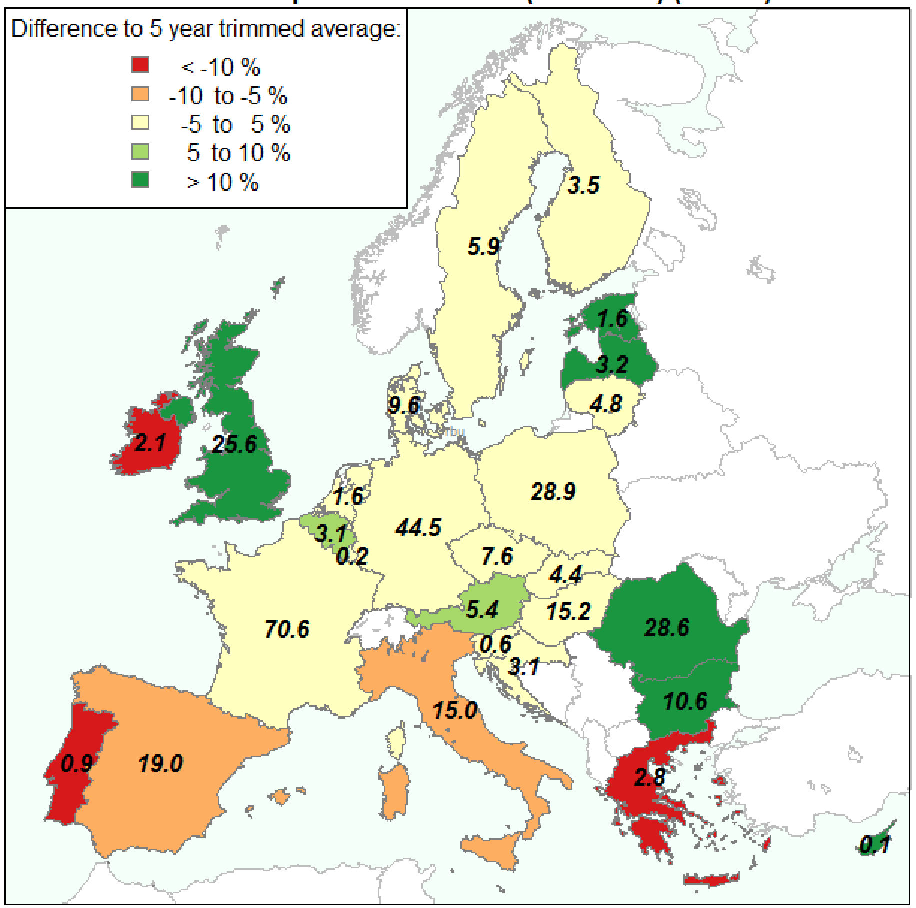
2019-20 MY vs 5Y average

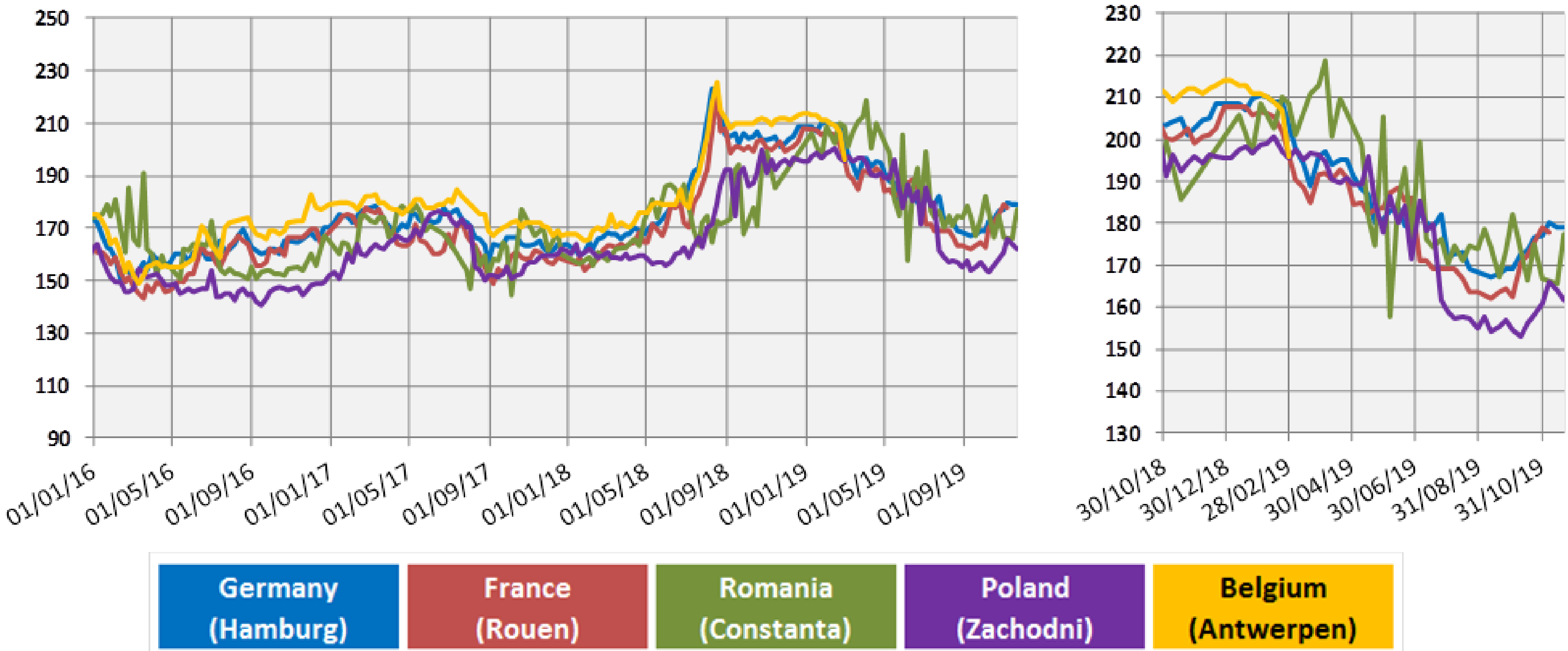
All cereals production 2019 (million t) (f'cast.)



Calculations and cartography: European Commission DG AGRI G4 2019-10-29 © EuroGeographics for the administrative boundaries

EU28 production : 315.6 (million t) Difference to 5 year trimmed average: 4 %

EU Market prices for milling wheat (€/tonne)



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

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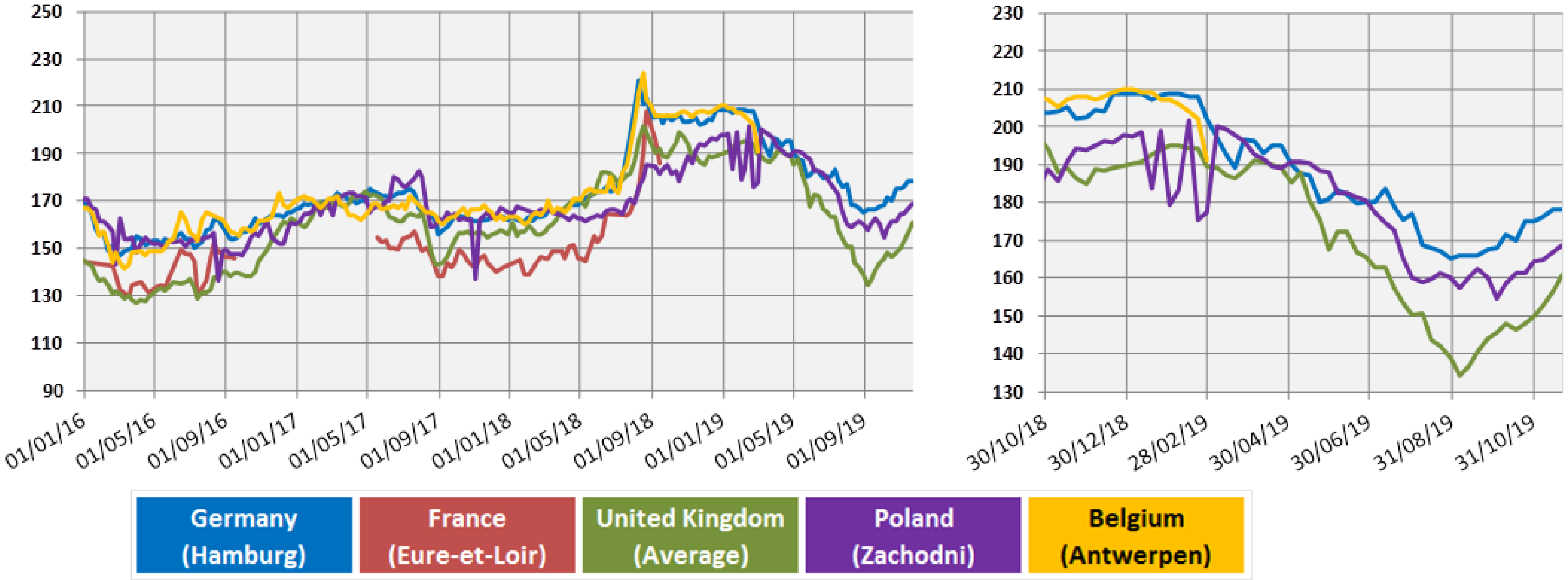
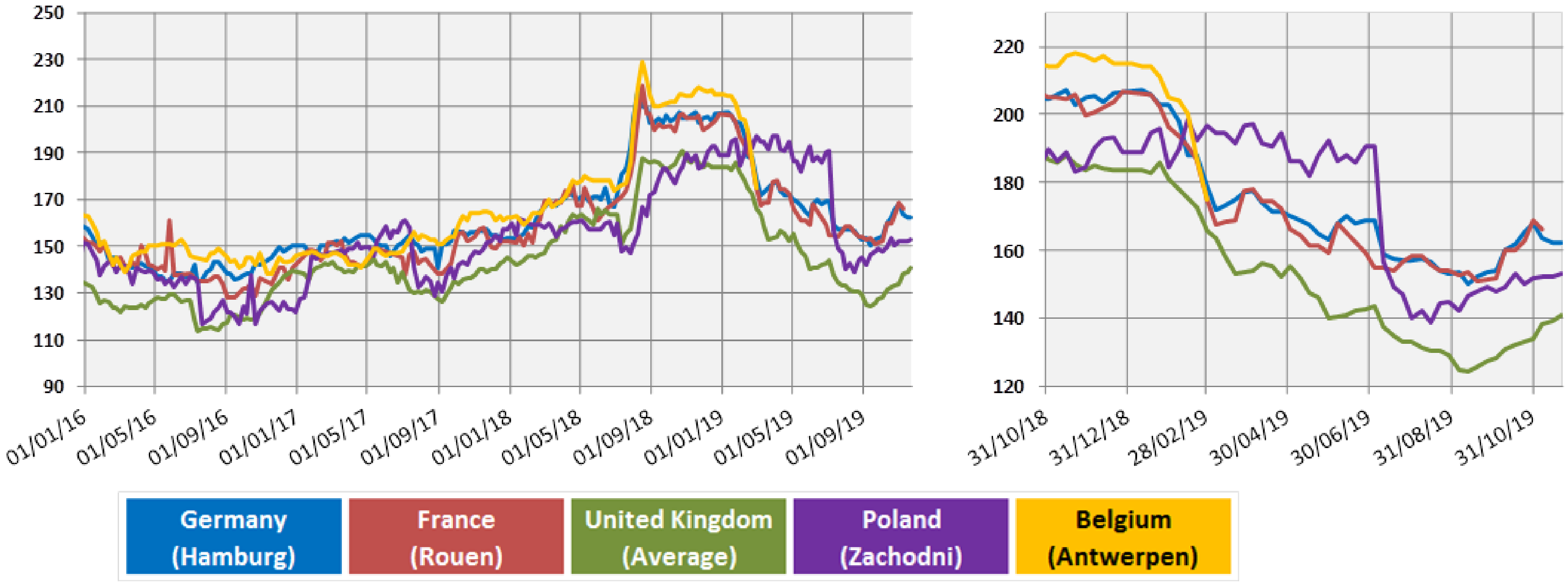
EU Market prices for feed wheat (€/tonne)



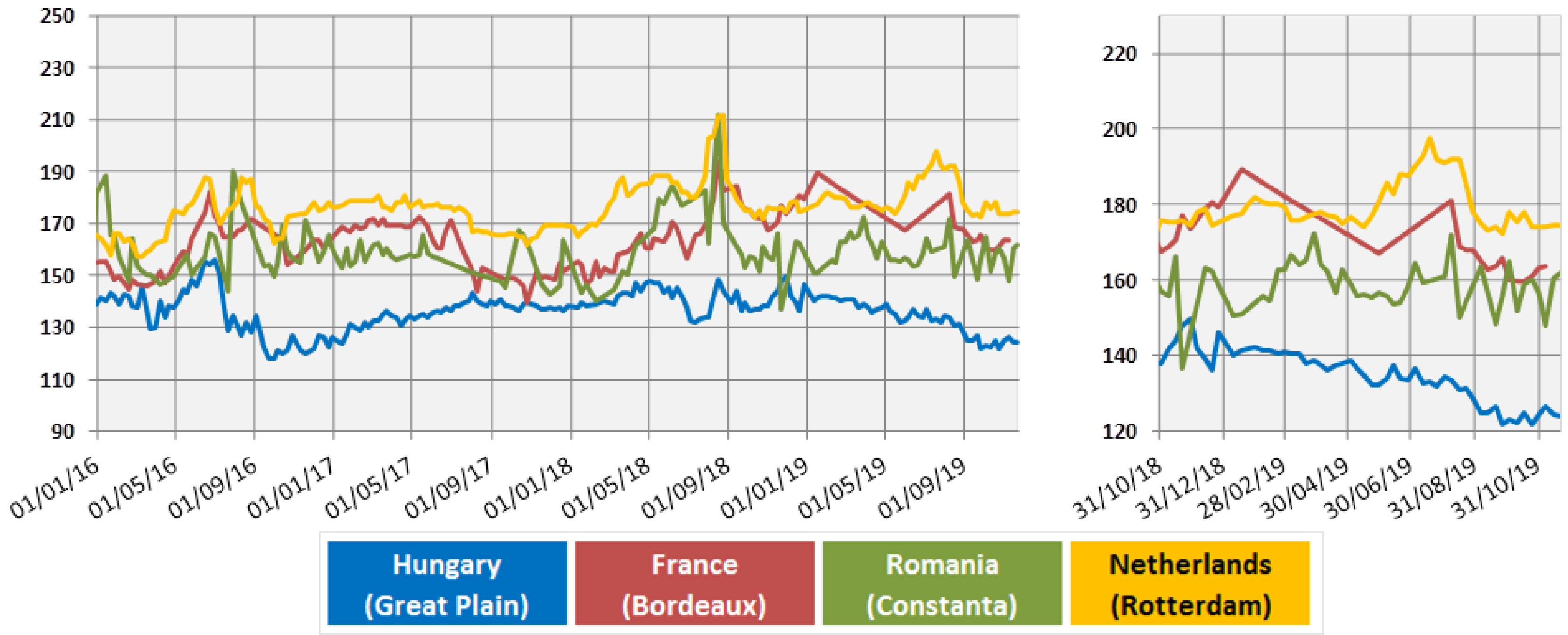
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

EU Market prices for feed barley (€/tonne)



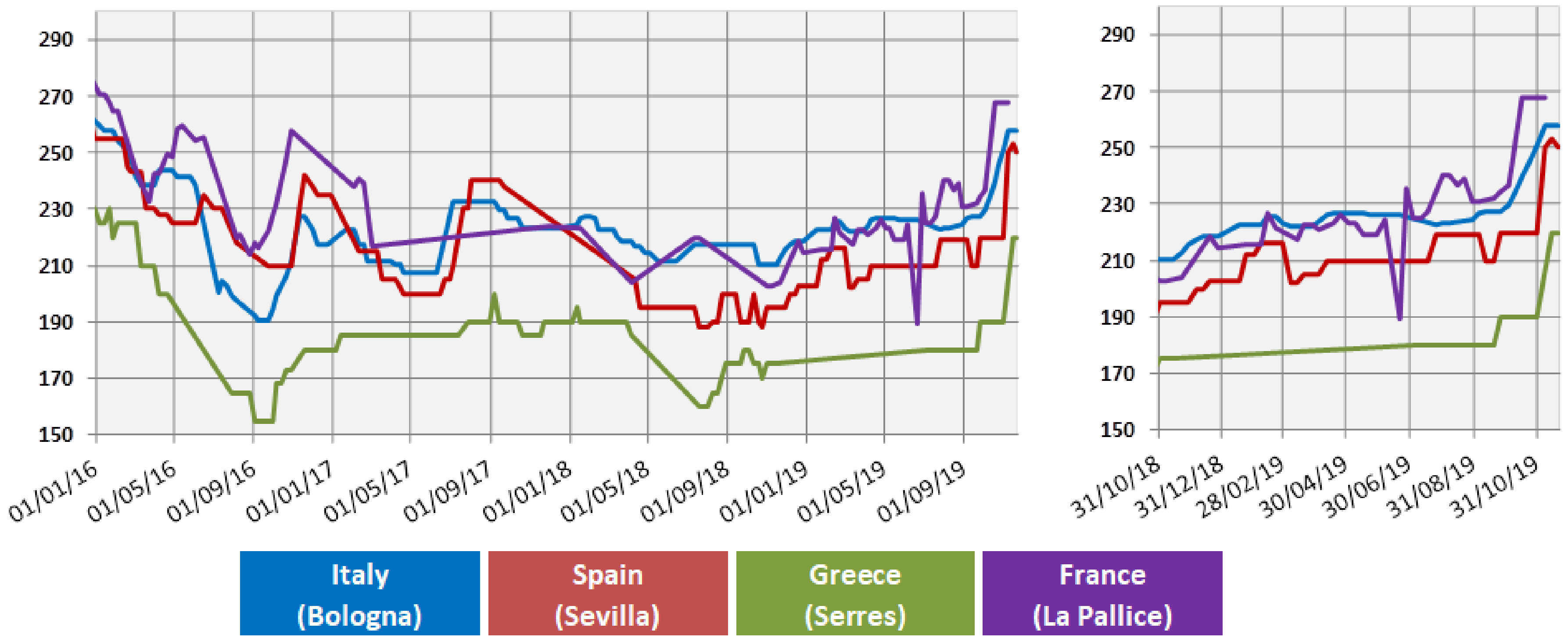
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

EU Market prices for maize (€/tonne)



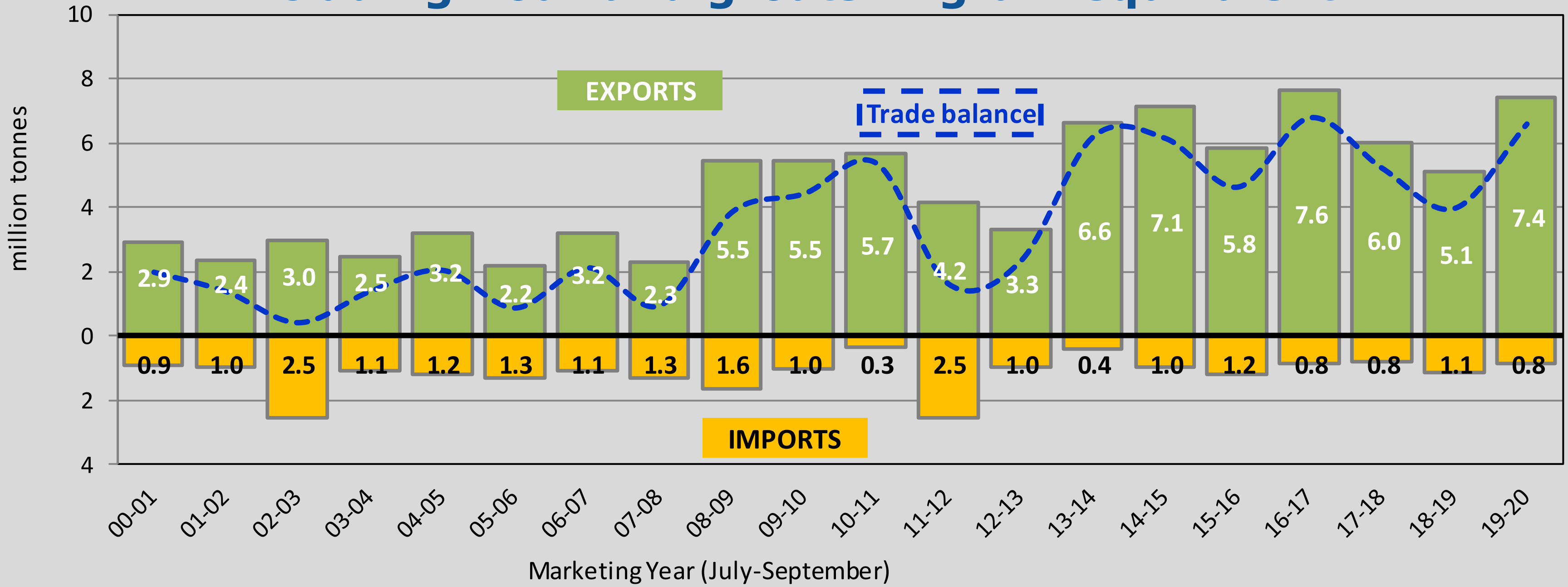
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

EU Market prices for durum wheat (€/tonne)



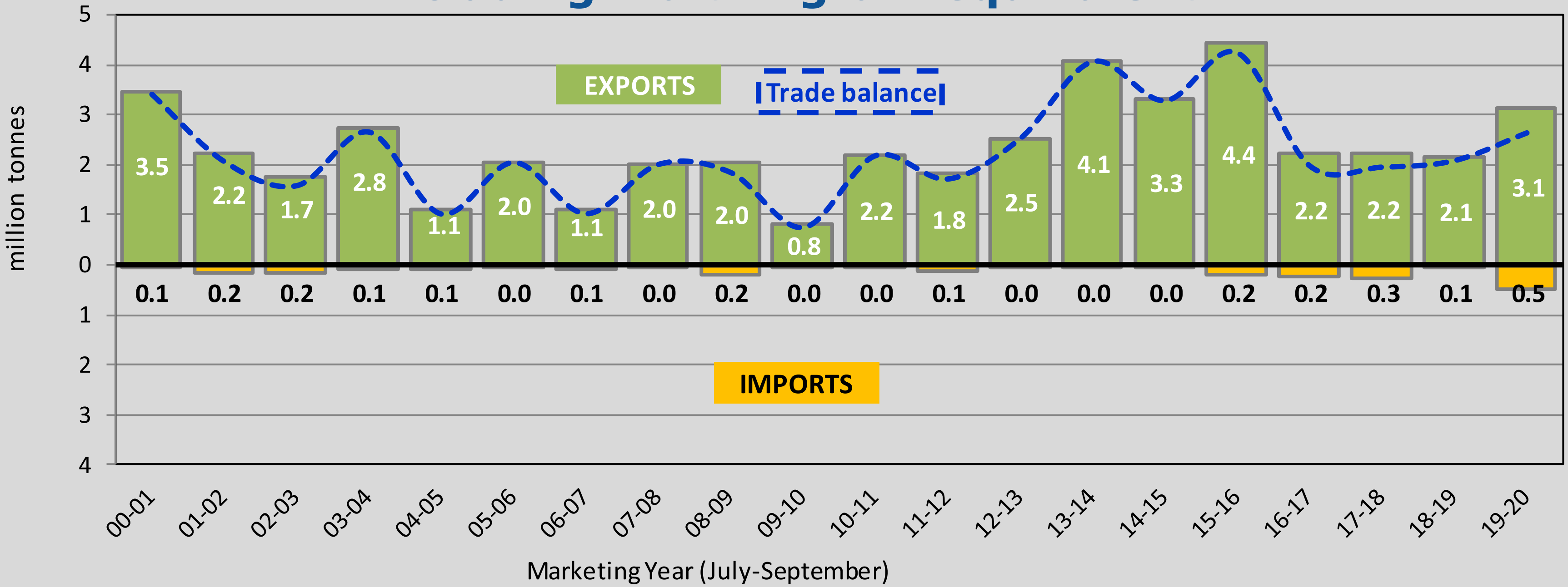
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

EU28 – Common wheat exports and imports (July - September) including flour and groats in grain equivalent



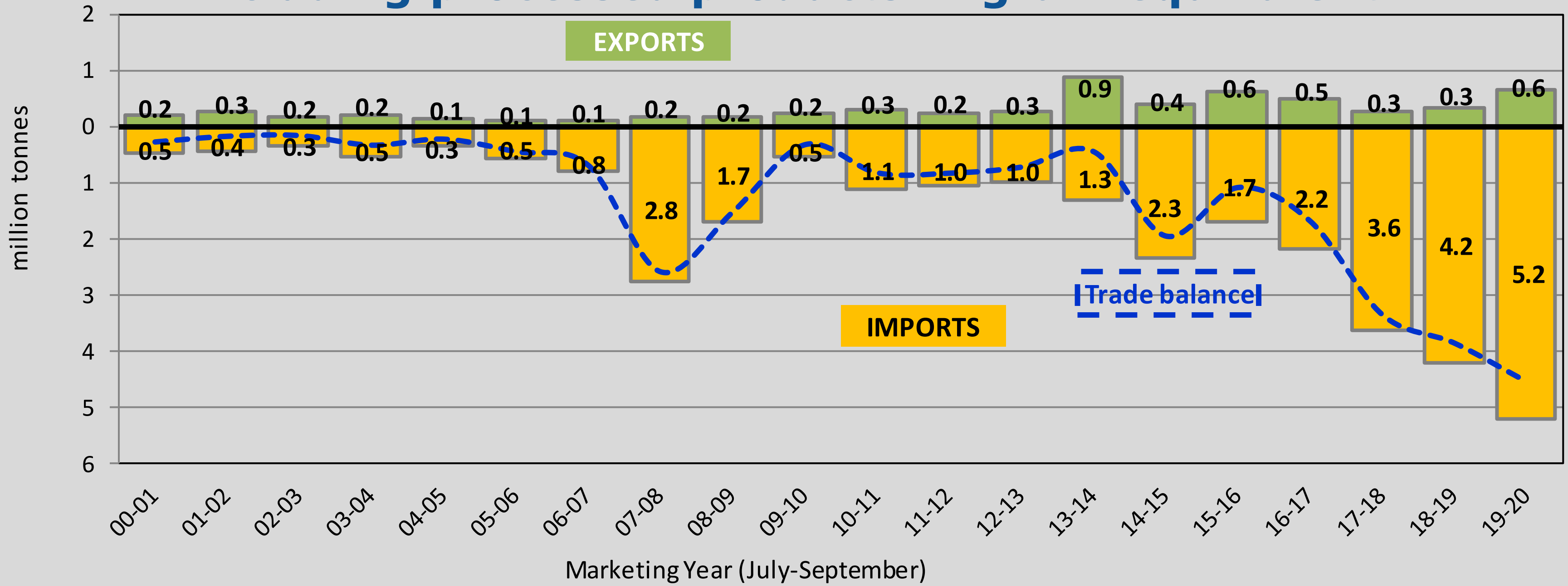
Source: EUROSTAT, Comext extraction at 15/11/2019

EU28 – Barley exports and imports (July - September) including malt in grain equivalent



Source: EUROSTAT, Comext extraction at 15/11/2019

EU28 – Maize exports and imports (July - September) including processed products in grain equivalent



Source: EUROSTAT, Comext extraction at 15/11/2019

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EU 28 Cereals Balance Sheet

Thousand metric tonnes

LAST UPDATED: 31/10/2019	2019/20 (forecast)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**11.882**	**5.230**	**2.298**	**25.020**	**204**	**646**	**220**	**1.103**	**144**	**46.746**
Usable production	147.010	62.416	7.775	66.580	8.338	941	7.720	10.866	3.914	315.560
Area (thousand ha)	*23.896*	*12.237*	*2.315*	*8.853*	*2.215*	*190*	*2.657*	*2.742*	*1.374*	*56.479*
Yield (tonnes/ha)	*6,2*	*5,1*	*3,4*	*7,5*	*3,8*	*4,9*	*2,9*	*4,0*	*2,8*	*5,6*
Imports (from third countries)	3.379	600	2.000	17.000	80	259	4		154	23.476
Total supply	**162.271**	**68.245**	**12.073**	**108.600**	**8.622**	**1.845**	**7.944**	**11.969**	**4.212**	**385.782**
Total domestic use	118.138	50.285	9.436	83.418	6.905	746	7.470	9.931	3.658	289.987
Human consumption	48.147	363	8.071	4.881	3.069	156	1.152	52	23	65.913
Seed	4.891	2.165	430	430	456	40	445	539	293	9.691
Industrial uses	11.600	9.156	95	12.507	1.311		103	449	202	35.423
of which bioethanol/biofuel	*5.000*	*437*		*6.800*	*700*			*344*	*14*	*13.295*
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)	26.000	9.000	900	3.500	154	4	187	2	8	39.755
Total use	**144.138**	**59.285**	**10.336**	**86.918**	**7.060**	**750**	**7.656**	**9.932**	**3.666**	**329.743**
Ending stocks**	**18.133**	**8.960**	**1.737**	**21.682**	**1.562**	**1.095**	**288**	**2.037**	**546**	**56.039**
Change in stocks**	6.251	3.730	-562	-3.338	1.358	449	68	934	402	9.293

* Marketing year: from July to June

** At the end of the marketing year

EU BALANCE SHEET 2019/20

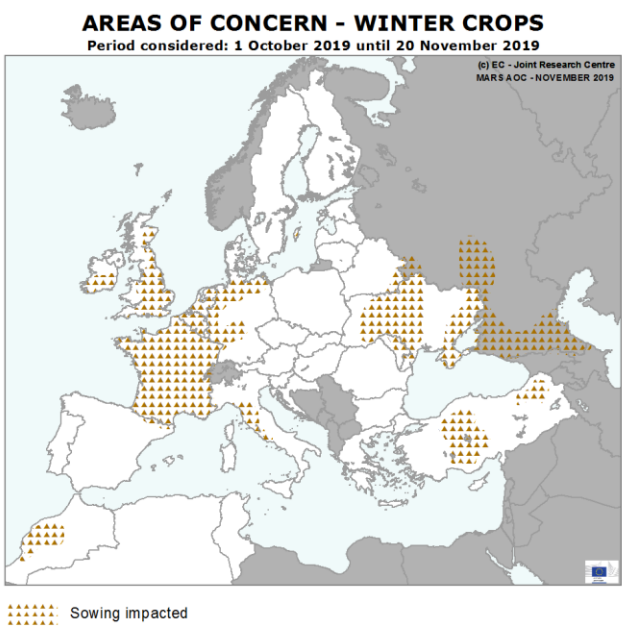
- Production forecast : above average (315,6 million tonnes, + 8,8% y/y)
  - Increase of total EU cereal area (56,6 million ha, 2,8% y/y)
  - Recovery of soft wheat and barley production
  - Good quality milling wheat at EU level

- Decrease of total imports, in particular for maize

- Recovery of total exports, in particular for soft wheat

- Increase of total ending stocks

Autumn sowings



winter cereals

- **completed or progressing well**
  - Central and south-eastern Europe: practically completed
  - Southern Europe: progressing well
- **some problems by abundant rainfall**
  - UK, FR, central IT, BE, LU, NL, northern DE

Rapeseed

- **Aug/Sept: dryness in main prod. countries – reduced area**
  - Oct/Nov: beneficial rains for emergence

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Oilseeds

Agriculture and Rural Development

EU Oilseeds

EU OILSEEDS AREA

Million ha	AVG 5 yrs trimmed	2018/19	2019/20	change year on year	change on 5yrs AVG
Rapeseed	6,67	6,90	**5,64**	-18,3%	-15,4%
Sunflower	4,20	4,03	**4,35**	8,1%	3,6%
Soya Beans	0,89	0,96	**0,99**	4,1%	11,3%
TOTAL	**11,76**	**11,88**	**10,99**	**-8%**	**-7%**

Sources : EC - DG AGRI

EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2018/19	2019/20	change 2018/19	change AVG 5yrs
Rapeseed	21,31	20,01	**16,77**	-16,2%	-21,3%
Sunflower	9,33	9,97	**9,84**	-1,3%	5,5%
Soya Beans	2,51	2,83	**2,94**	3,7%	17,2%
TOTAL	**32,88**	**32,82**	**29,55**	**-10,0%**	**-10,9%**

Sources : EC - DG AGRI

EU rapeseed (MS)

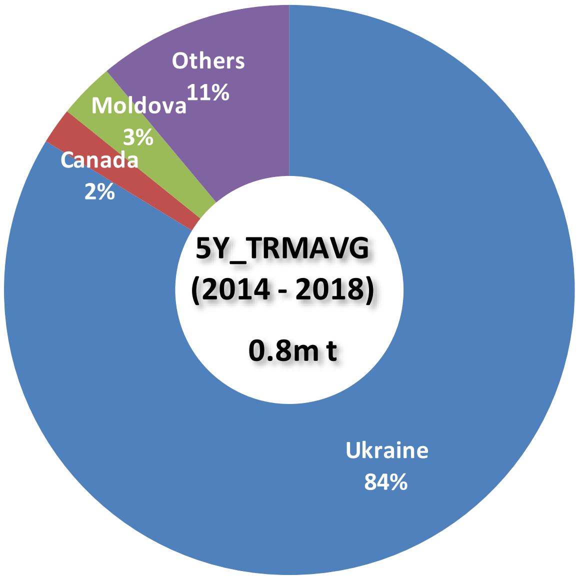
Rapeseed

Production Million tonnes	AVG 5 yrs trimmed	2018/19	**2019/20 October**	change year on year	%change 5yrs trimmed
TOTAL EU	**21,31**	**20,04**	**16,77**	**-16,3%**	**-21,3%**
France	5,21	4,95	**3,54**	-29%	-32%
Germany	4,62	3,68	**2,85**	-23%	-39%
Poland	2,54	2,18	**2,29**	5%	-10%
UK	2,23	2,07	**1,77**	-15%	-21%
Czech Republic	1,34	1,41	**1,16**	-18%	-14%
Romania	1,32	1,61	**0,69**	-57%	-48%
Others	4,04	4,14	**4,48**	8%	11%

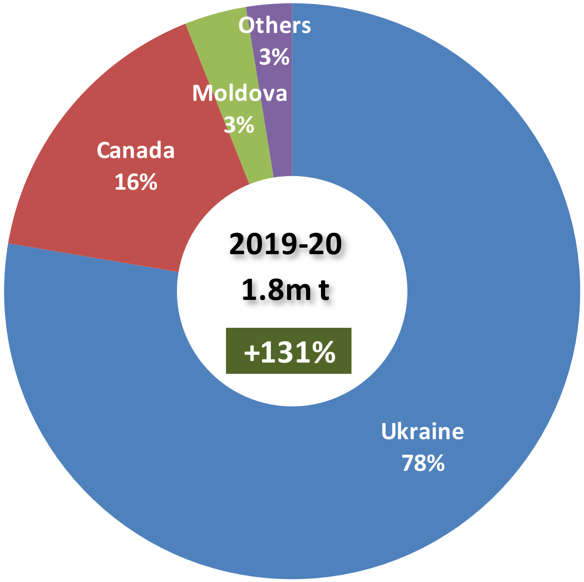
Sources : EC-DG AGRI

EU rapeseed import origins

(July - September)



(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20	
Ukraine	644	1 382	115%
Canada	16	290	1740%
Moldova	24	62	155%
Others	85	46	-46%



Source: Eurostat- Comext @ 15 Nov 2019

EU oilseeds balance sheet

Thousand metric tonnes

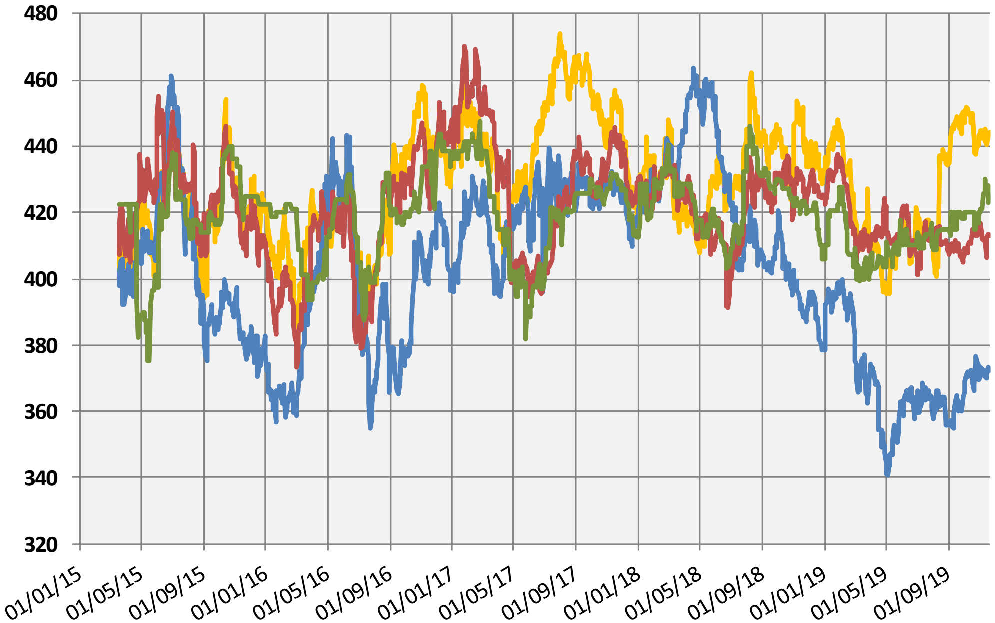
OILSEED	2018/19 est				2019/20 fc			
LAST UPDATED: 31/10/2019	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
Beginning stocks	**2 287**	**2 296**	**937**	**5 520**	**1 520**	**2 140**	**891**	**4 551**
Usable production	20 015	2 833	9 973	32 820	16 769	2 938	9 842	29 549
Area (thousand ha)	*6 901*	*956*	*4 026*	*11 882*	*5 641*	*995*	*4 350*	*10 986*
Yield (tonnes/ha)	*2.9*	*3.0*	*2.5*	*2.8*	*3.0*	*3.0*	*2.3*	*2.7*
Imports (from third countries)	4 232	15 076	521	19 830	6 000	15 100	513	21 613
Total supply	**26 534**	**20 205**	**11 431**	**58 170**	**24 289**	**20 178**	**11 246**	**55 713**
Domestic use	24 924	17 907	10 014	52 846	23 189	18 911	9 918	52 018
of which crushing	*24 030*	*15 843*	*8 907*	*48 780*	*22 348*	*16 599*	*8 855*	*47 803*
Exports (to third countries)	89	158	526	772	100	167	503	770
Total use	**25 014**	**18 065**	**10 540**	**53 619**	**23 289**	**19 078**	**10 421**	**52 788**
Ending stocks	**1 520**	**2 140**	**891**	**4 551**	**1 000**	**1 100**	**825**	**2 925**
Change in stocks	-767	-156	-46	-969	-520	-1 040	-66	-1 626

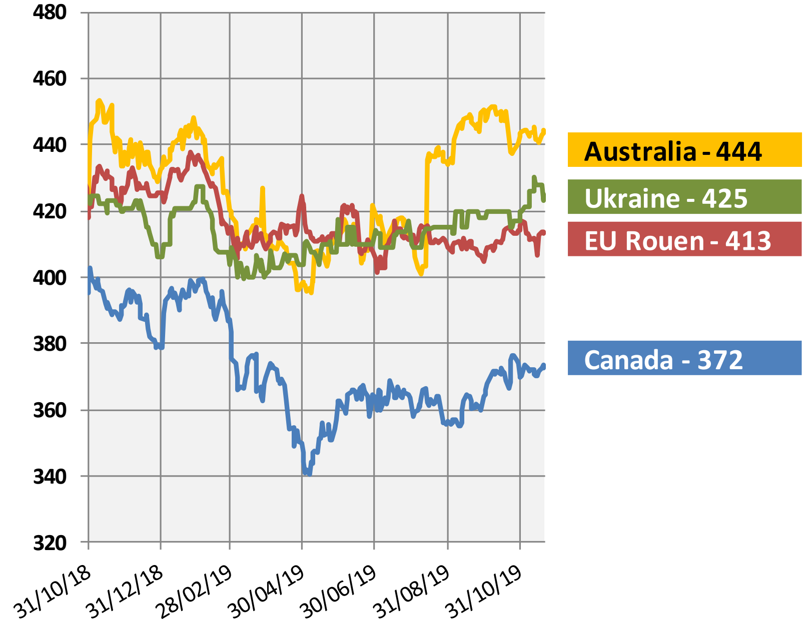
EU Oilseeds: key messages

2019/20 Marketing year

- **Total oilseed area 2019/20** decreased from last marketing year to just under 11 million hectares. The 18% decrease for rapeseed is only partly offset by an increase for sunflower and soya beans and the total oilseed area is 7% below the five-year average.
- Reflecting the area declines, EU oilseed **production** for 2019/20 is expected at only **29.6** million tonnes, 11% below the average. With 16.8 million tonnes, rapeseed production is seen at the lowest level since 2006/7. The annual increase of soya bean output is only partly offsetting the declines for rapeseed and sunflowerseed.
- To compensate for the low EU rapeseed production, EU rapeseed imports are expected to be record highs in 2019/20

World export prices for rapeseed - ($/tonne)





Source: International Grains Council

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Proteins

Agriculture and Rural Development

EU Protein crops

EU PROTEIN CROPS AREA

Million ha	AVG 5 yrs trimmed	2018/19	**2019/20**	change 2018/19	change 5yrs trimmed
Field peas	0,84	0,87	**0,83**	-4,6%	-1,7%
Broad beans	0,63	0,62	**0,58**	-7,4%	-8,9%
Sweet lupins	0,17	0,15	**0,16**	6,7%	-2,9%
TOTAL	**1,67**	**1,64**	**1,57**	**-5%**	**-6%**

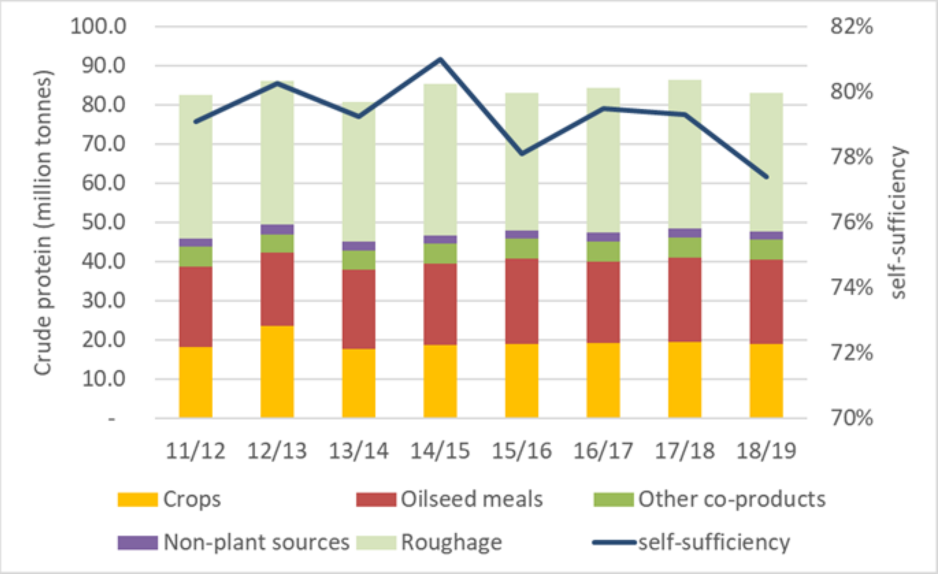
Sources : EC - DG AGRI

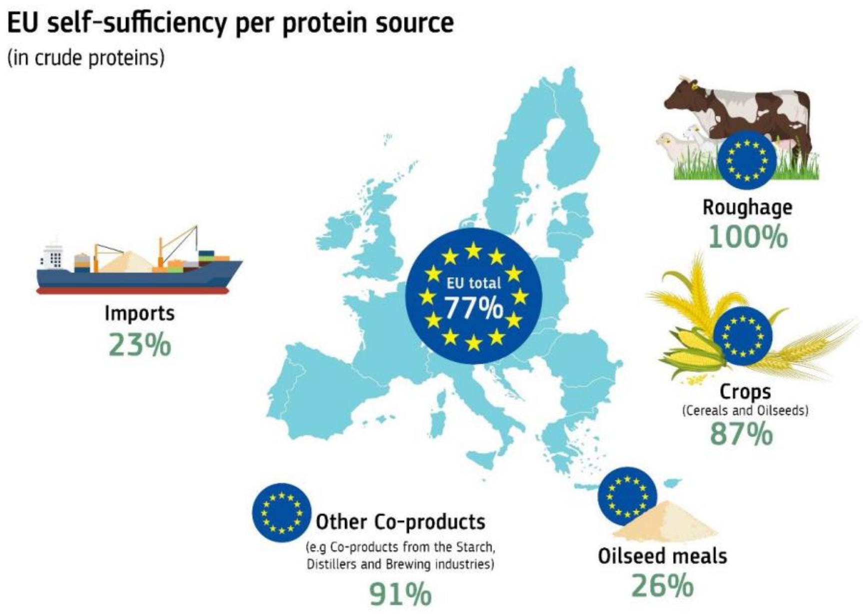
EU PROTEIN CROPS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2018/19	**2019/20**	change 2018/19	change AVG 5 years
Field peas	2,13	2,00	**2,20**	9,8%	3,2%
Broad beans	1,76	1,40	**1,59**	13,4%	-10,0%
Sweet lupins	0,26	0,21	**0,25**	15,4%	-4,5%
TOTAL	**4,18**	**3,61**	**4,03**	**11,5%**	**-3,6%**

Sources : EC - DG AGRI

EU feed protein balance sheet – 2018/19 update





https://ec.europa.eu/info/files/eu-feed-protein-balance-sheet-2018-19_en

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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