



European
Commission



Civil Dialogue Group

Arable Crops

28th April 2015

EU RICE IMPORTS

DG Agriculture and Rural Development

European Commission

AGRI C4

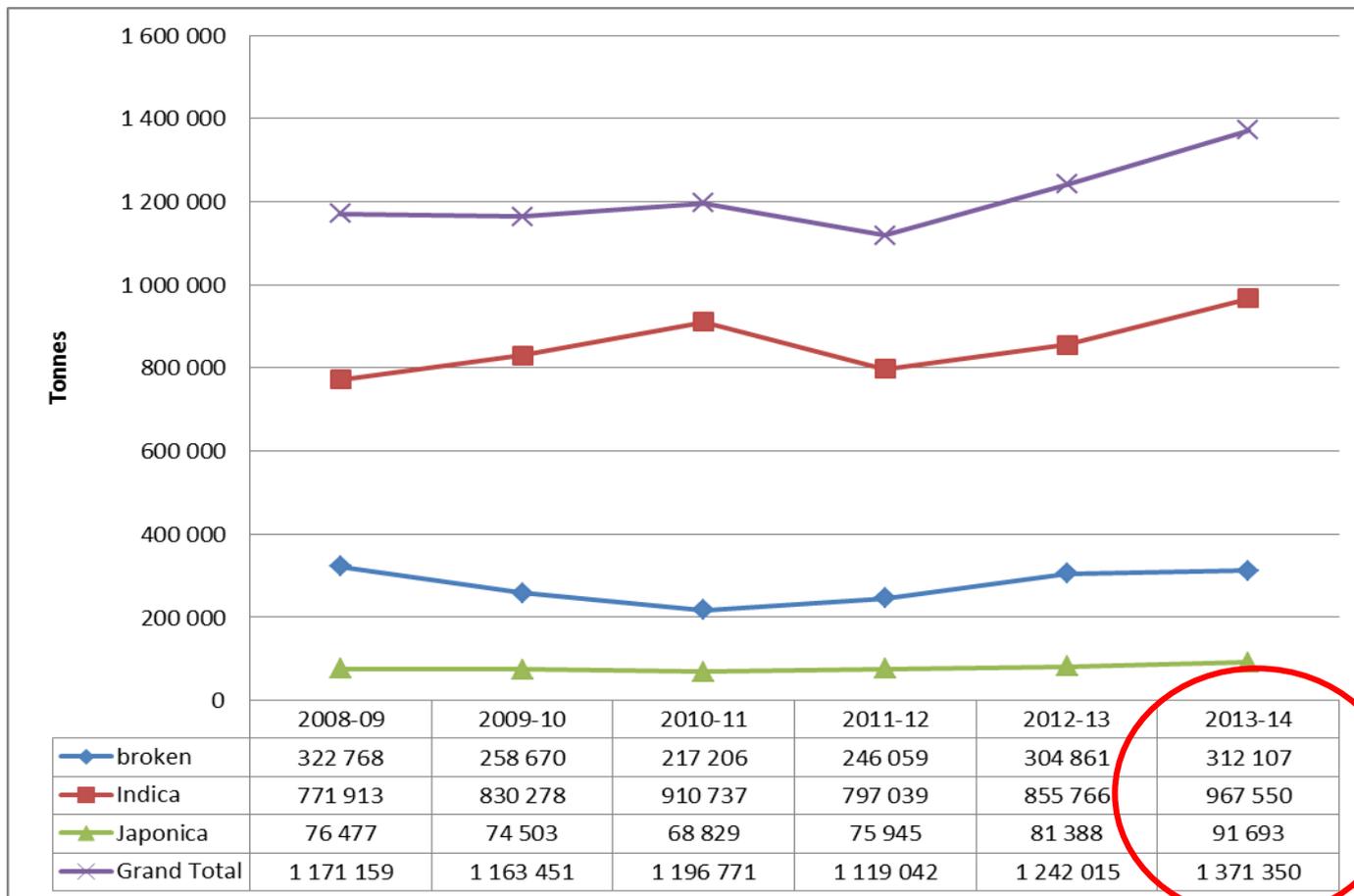


Agriculture
and Rural
Development

EU Rice Imports:

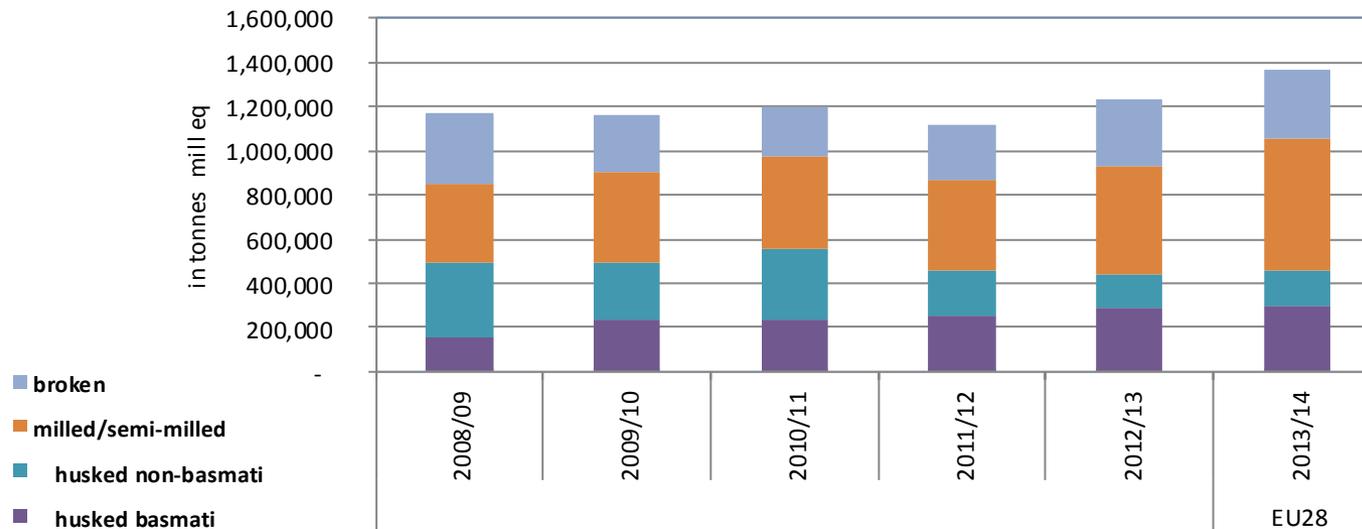
- Total rice imports
- EBA rice imports

Total EU Rice Imports: approx. 1 Mio. Tonnes (milled eq.), mainly Indica (Source: COMEXT, by product, in tonnes milled eq)



Total EU Rice Imports: mainly milled rice and husked Basmati rice

(Source: COMEXT, by product, in tonnes milled eq)

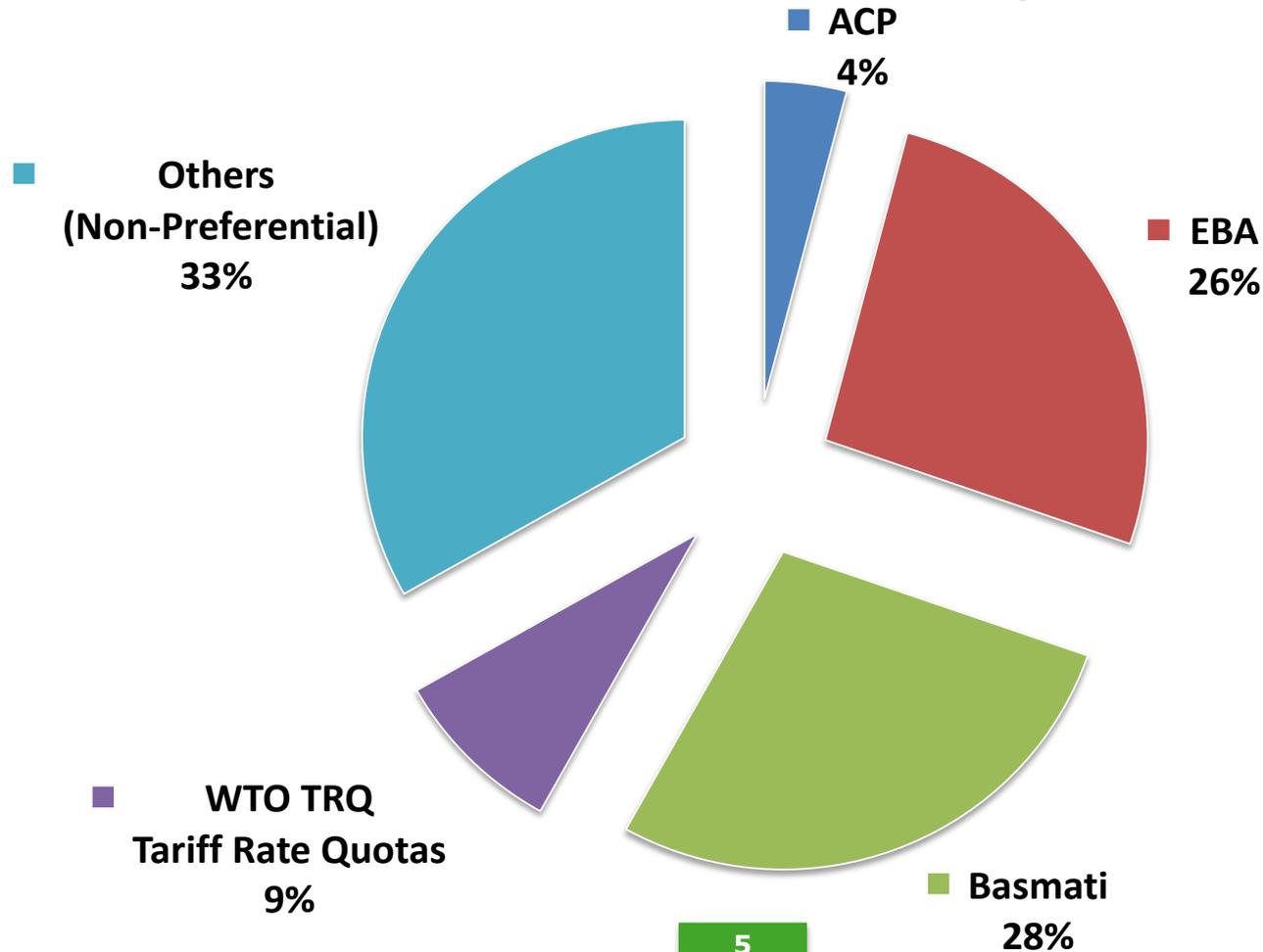


	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
paddy	988	934	337	650	1,191	1,189
husked	494,091	492,776	552,324	454,194	441,896	453,883
<i>husked basmati</i>	155,715	238,485	238,153	250,020	286,593	294,483
<i>husked non-basmati</i>	338,375	254,291	314,171	204,174	155,303	159,400
milled/semi-milled	353,312	411,072	426,904	418,141	494,068	604,171
Total (excl. broken)	848,391	904,781	979,565	872,984	937,154	1,059,243
broken	322,768	258,670	217,206	246,059	304,861	312,107
Grand Total (incl. broken)	1,171,159	1,163,451	1,196,771	1,119,042	1,242,015	1,371,350

EU Rice Imports: Different Import Regimes

(Source: COMEXT, in tonnes milled eq)

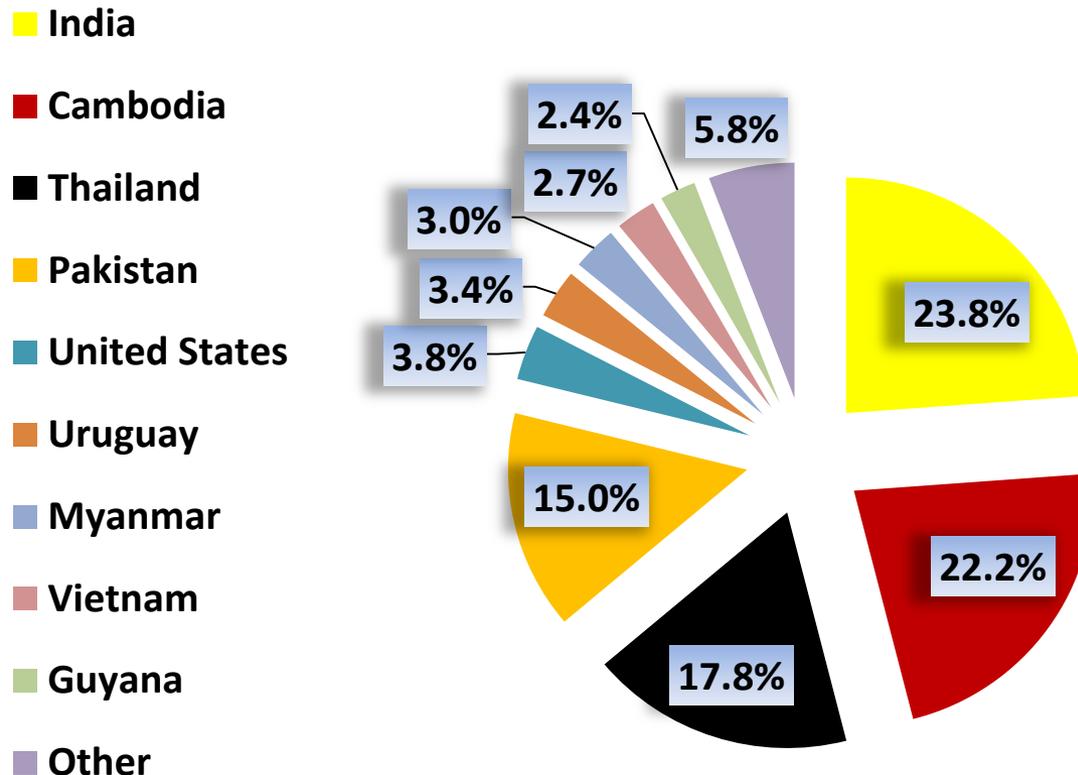
2013/14 total : 1 059 243 tonnes (excl. broken)



EU Rice Imports: Different Countries of Origin

(Source: COMEXT, in tonnes milled eq)

2013/14 total : 1 059 243 tonnes (excl. broken)



Recent evolution of Total EU rice imports – MY first half

(Source: COMEXT, by product, in tonnes milled eq)

Rice IMPORTS H1 2013/14 vs H1 2014/15

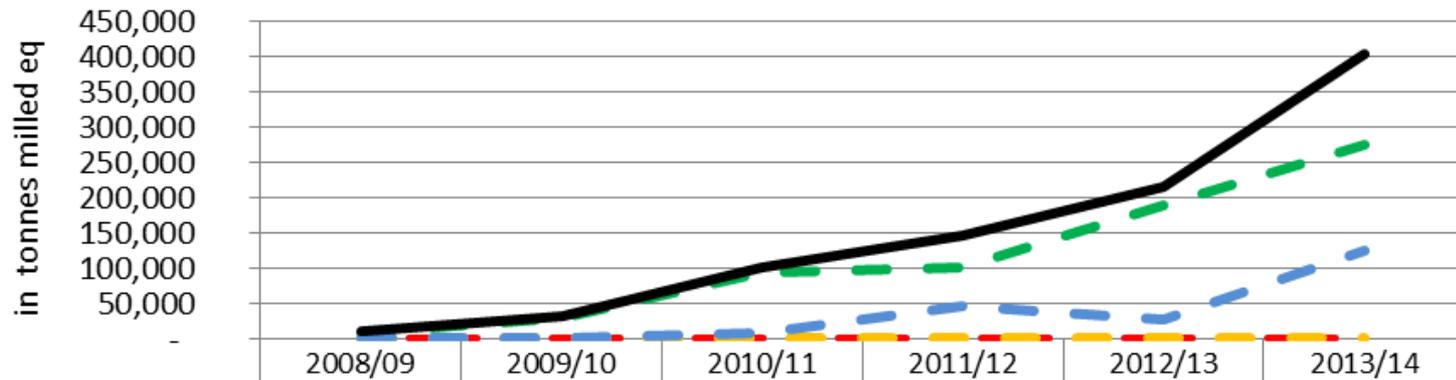
Type	Sept-Feb. 2013-14	Sept-Feb. 2014-15	H1 2014/15 vs H1 2013/14
Paddy (CN 1006 10)	784	166	- 79%
Husked (CN 1006 20)	173 945	184 082	+ 6%
Milled (CN 1006 30)	284 604	299 280	+ 5%
Total (excl. broken)	459 333	483 528	+5%
Broken (CN 1006 40)	155 593	179 985	+ 16%
Grand Total	614 926	663 513	+ 8%

EU Rice Imports:

- Total rice imports
- EBA rice imports

Evolution of EBA rice imports

(Source: COMEXT, by type, tonnes milled eq, incl. broken)



	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
— paddy	1	12	33	0	2	96
— husked	2,030	595	433	36	453	1,067
— semi-milled	759	273	149	520	481	1,244
— milled	6,926	30,607	92,848	100,242	189,095	274,648
— broken	564	70	7,886	46,245	25,977	125,851
— Grand Total	10,280	31,557	101,348	147,044	216,008	402,906

% EBA Imports Total Imports	1%	3%	8%	13%	17%	29%
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EBA imports substitute some rice imports

Recent evolution of EBA rice imports – MY first half

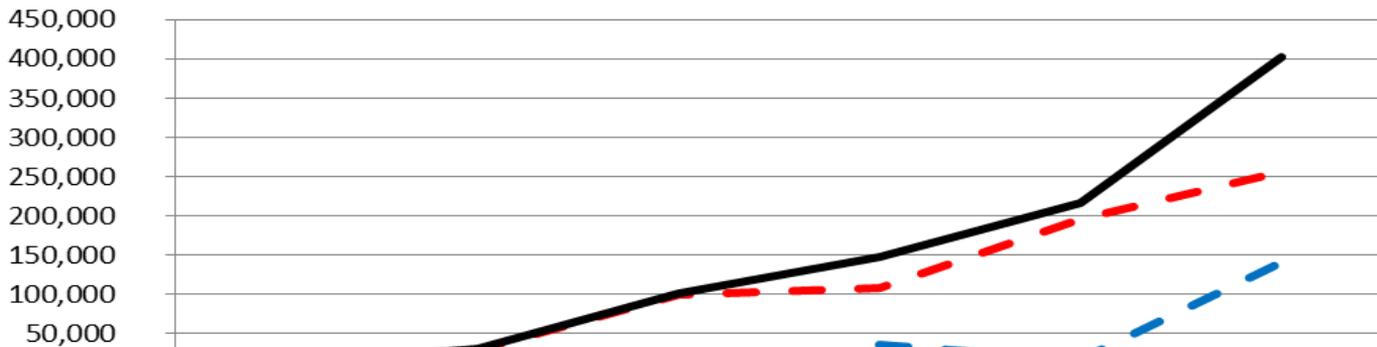
(Source: COMEXT, by product, in tonnes milled eq)

Recent increase mainly in broken rice imports

Type	Sept-Feb. 2013-14	Sept-Feb. 2014-15	H1 2014/15 vs H1 2013/14
Paddy (CN 1006 10)	14	61	
Husked (CN 1006 20)	580	462	- 20%
Milled (CN 1006 30)	122 718	127 514	+ 4%
Total (excl. broken)	123 311	128 037	+ 4%
Broken (CN 1006 40)	42 482	68 881	+ 62%
Grand Total	165 793	196 918	+ 19%

EBA rice imports: 2 main countries of origin

(Source: COMEXT, by country, tonnes milled eq, incl. broken)



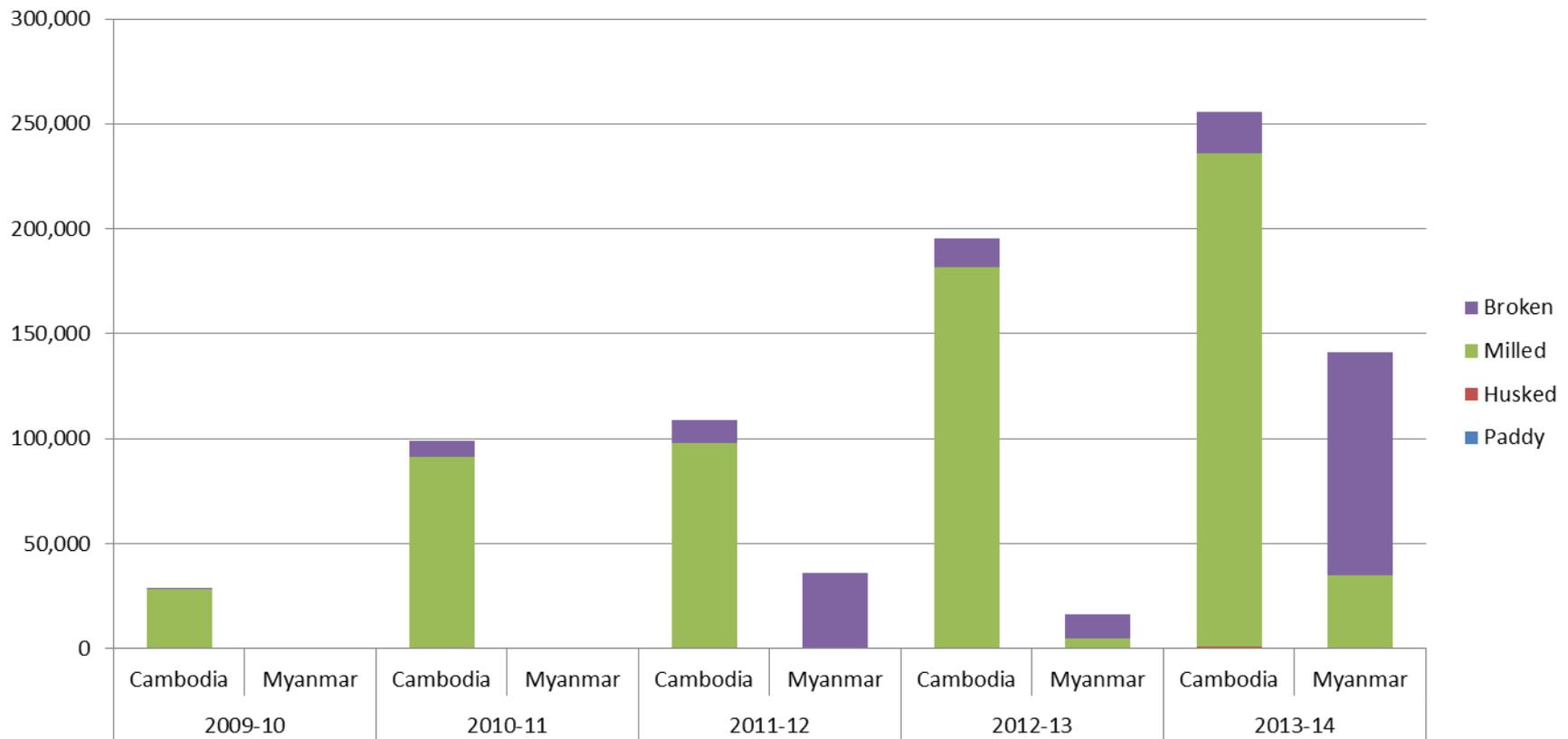
	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
Cambodia	6,012	28,617	98,986	108,784	195,617	255,766
Myanmar	-	-	-	35,938	16,420	141,144
Bangladesh	4,113	2,722	655	178	1,464	2,256
Laos	95	158	1,652	2,083	2,437	3,702
other	60	60	54	60	70	38
Grand Total	10,280	31,557	101,348	147,044	216,008	402,906

% Cambodia in EBA Imports	58%	91%	98%	74%	91%	63%
% Myanmar in EBA Imports	-	-	-	24%	8%	35%

EBA rice imports:

Milled rice from Cambodia and Broken rice from Myanmar

(Source: COMEXT, by country, tonnes milled eq, incl. broken)



Recent evolution of Cambodia rice imports – MY first half

(Source: COMEXT, by product, in tonnes milled eq)

Type	Sept-Feb. 2013-14	Sept-Feb. 2014-15	H1 2014/15 vs H1 2013/14
Paddy (CN 1006 10)	13	55	+ 325%
Husked (CN 1006 20)	507	417	- 18%
Milled (CN 1006 30)	111 603	99 678	- 11%
Total (excl. broken)	112 123	100 150	- 11%
Broken (CN 1006 40)	9 149	9 450	+ 3%
Grand Total	121 272	109 600	- 10%

Recent evolution of Myanmar rice imports – MY first half

(Source: COMEXT, by product, in tonnes milled eq)

Type	Sept-Feb. 2013-14	Sept-Feb. 2014-15	H1 2014/15 vs H1 2013/14
Paddy (CN 1006 10)	-	-	-
Husked (CN 1006 20)	50	-	-
Milled (CN 1006 30)	8 648	25 334	+ 193%
Total (excl. broken)	8 698	25 334	+ 191%
Broken (CN 1006 40)	33 310	59 365	+ 78%
Grand Total	42 008	84 699	+ 102%



Cambodia Rice Federation (CRF) Press Release of 20th March 2015

(see <http://www.crf.org.kh/>)

VISIT OF THE EUROPEAN UNION COMMISSION SERVICES FOR AGRICULTURE AND TRADE

.... As of 2014, export data had shown that **Jasmine & Fragrant rice has jumped to nearly 60% of the total Cambodian rice exports.** Cambodia rice industry is shifting from a « number » game to a « quality » game.

CRF President Mr Sok Puthyvuth mentioned that "Although we have seen a rapid export growth towards the EU market in the past 3 years, we believe that **the 2014 export figures already represent a maximum export level** that we are comfortable with and it is not in our intention to grow even more our EU market share. We are also in the midst of **diversifying our export markets with a strategic shift of focus towards more fragrant rice production and export**".



**Thank you for
your attention**

**Follow-up contact:
damien.plan@ec.europa.eu**