



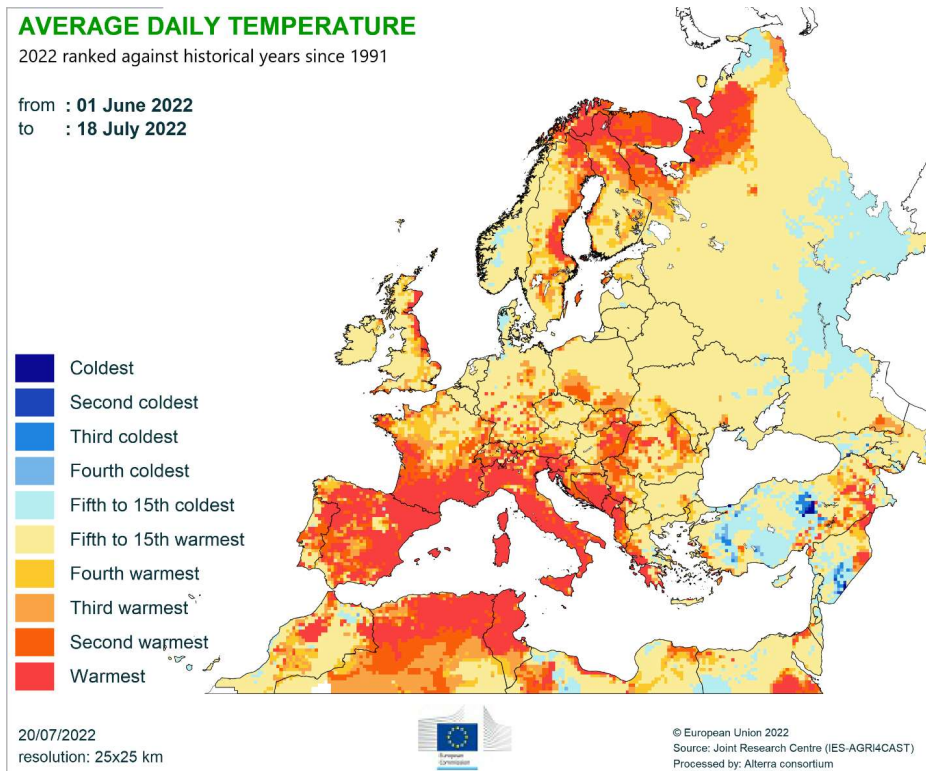
Crops Market Observatory

27 July 2022

AGRI-E4

Point 1

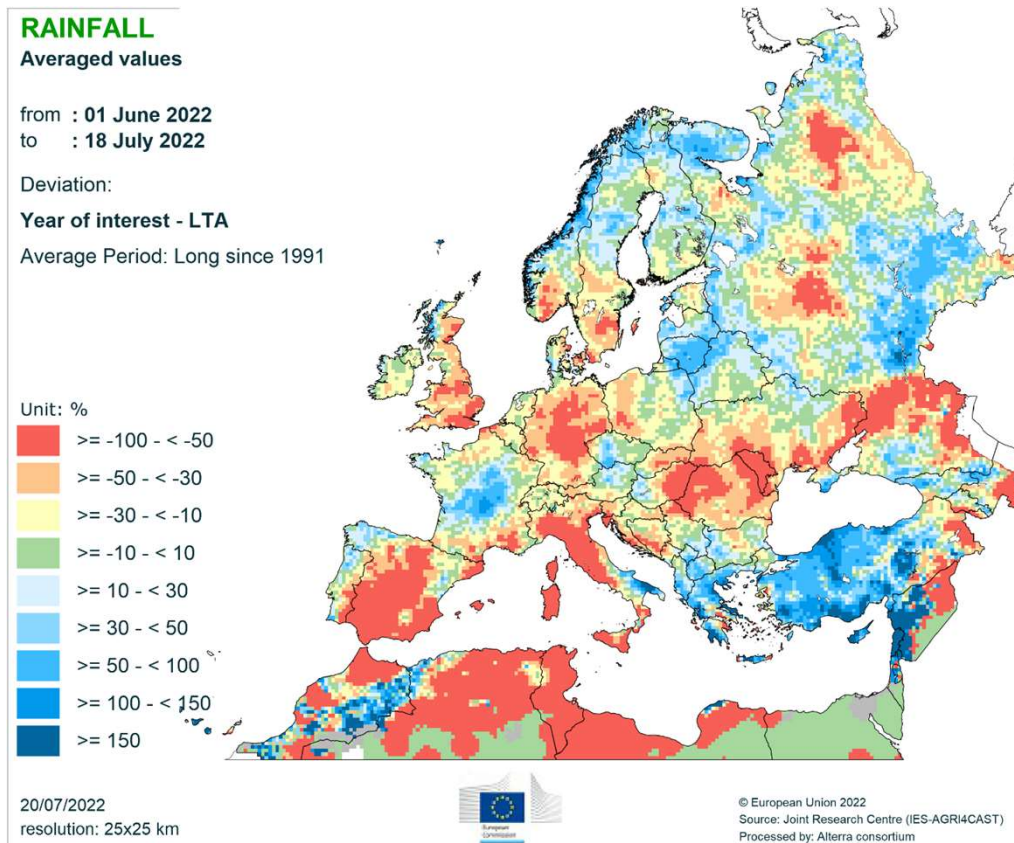
Agrometeorological overview



- **Warmer than usual**

- in most of Europe (FR, ES, IT, eastern HU...)

Agrometeorological overview



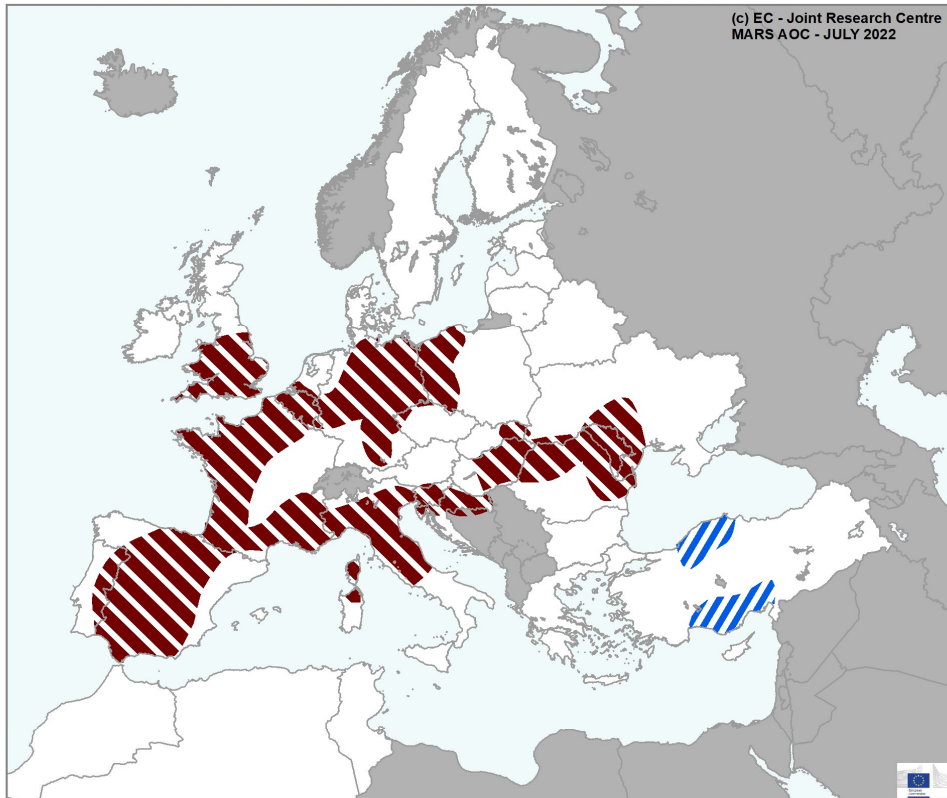
- **Drier than usual**

- below 100% LTA: most of ES, southern FR, DE, IT eastern HU, eastern and western RO as well as MD and eastern UA

2. Areas of Concern

AREAS OF CONCERN - EXTREME WEATHER EVENTS

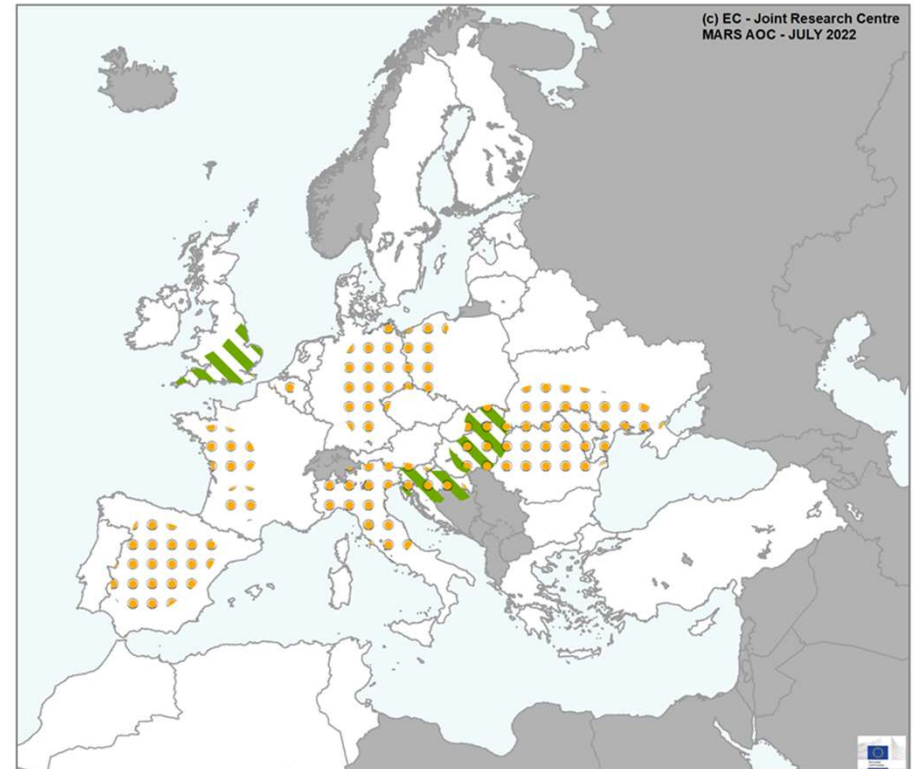
Based on weather data from 1 June 2022 until 22 July 2022





 High temperature and/or dry conditions

 Rain surplus

AREAS OF CONCERN - SUMMER/WINTER CROPS



 Winter and spring crops impacted

 Summer crops impacted

EU yields prospects

Crop	Yield t/ha				
	Avg 5yrs	June Bulletin	MARS 2022 forecasts	%22/5yrs	% Diff June
Total cereals	5.49	5.50	5.38	-2.1	-2.2
Total wheat	5.62	5.56	5.54	-1.4	-0.4
<i>Soft wheat</i>	5.84	5.76	5.74	-1.6	-0.3
<i>Durum wheat</i>	3.52	3.44	3.40	-3.3	-1.2
Total barley	4.85	4.88	4.83	-0.3	-1.0
<i>Spring barley</i>	4.13	4.19	4.10	-0.7	-2.1
<i>Winter barley</i>	5.75	5.73	5.72	-0.5	-0.2
Grain maize	7.87	7.87	7.25	-7.8	-7.9
Rye	3.90	4.00	4.07	+4.3	+1.8
Triticale	4.19	4.27	4.20	+0.2	-1.6
Rape and turnip rape	3.07	3.12	3.13	+1.9	+0.3
Potato	34.2	35.7	35.1	+2.8	-1.7
Sugar beet	74.4	78.1	77.4	+4.0	-0.9
Sunflower	2.34	2.37	2.18	-6.7	-8.0
Soybean	2.88	2.99	2.72	-5.7	-9.0
Green maize	41.6	—	39.7	-4.5	—

Issued: 22 July 2022

Cereals

EU cereals production forecast from JRC

Crop	Yield (t/ha)					Production (x 1000 t)				
	Avg 5yrs	2021	MARS 2022 forecasts	%22/5yrs	%22/21	Avg 5yrs	2021	2022	%22/5yrs	%22/21
Total cereals	5.49	5.70	5.38	-2.1	-5.6	286 600	296 342	280 497	-2.1	-5.3
Total wheat	5.62	5.81	5.54	-1.4	-4.7	133 274	138 869	132 422	-0.6	-4.6
<i>Soft wheat</i>	5.84	6.04	5.74	-1.6	-4.9	125 284	131 159	125 336	+0.0	-4.4
<i>Durum wheat</i>	3.52	3.54	3.40	-3.3	-3.9	7 990	7 710	7 086	-11	-8.1
Total barley	4.85	5.08	4.83	-0.3	-4.9	52 712	52 333	51 639	-2.0	-1.3
<i>Spring barley</i>	4.13	4.22	4.10	-0.7	-2.8	25 111	23 295	24 044	-4.2	+3.2
<i>Winter barley</i>	5.75	6.09	5.72	-0.5	-6.0	27 601	29 038	27 595	+0.0	-5.0
Grain maize	7.87	7.91	7.25	-7.8	-8.3	68 979	72 955	66 194	-4.0	-9.3
Rye	3.90	4.18	4.07	+4.3	-2.5	7 663	7 841	7 594	-0.9	-3.1
Triticale	4.19	4.41	4.20	+0.2	-5.0	11 006	11 432	10 677	-3.0	-6.6



EU cereals demand in 2022/23

– feed, biofuels...

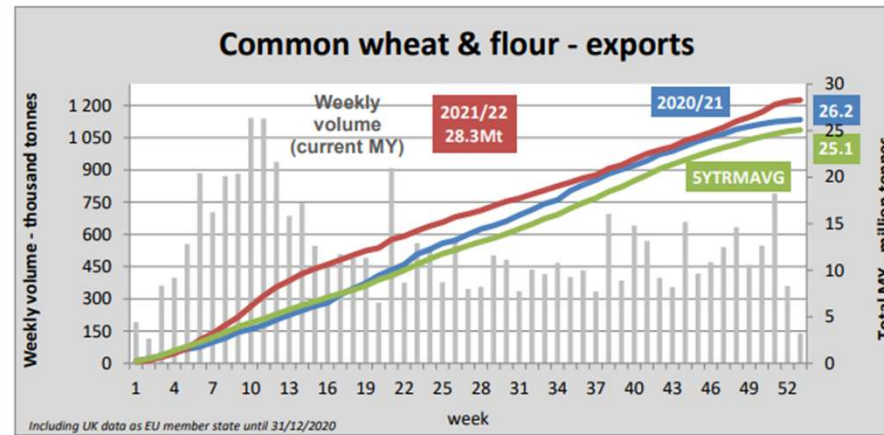
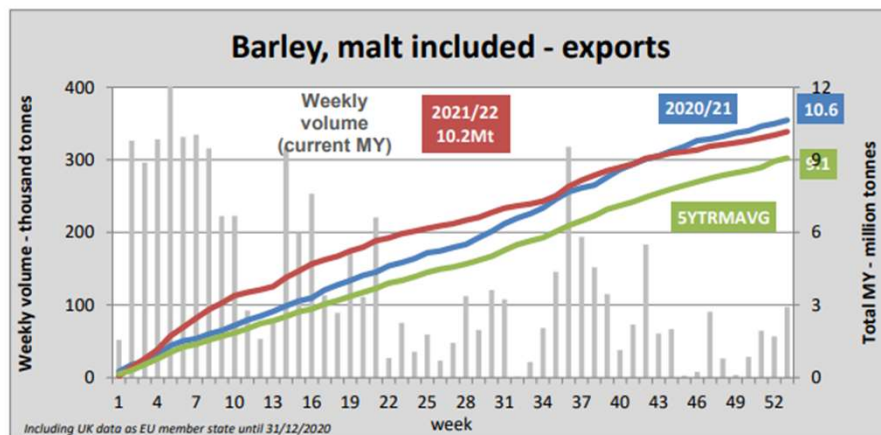
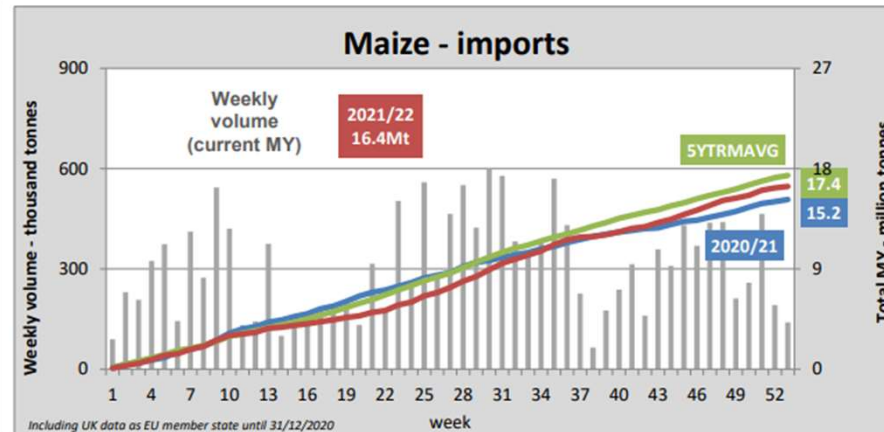
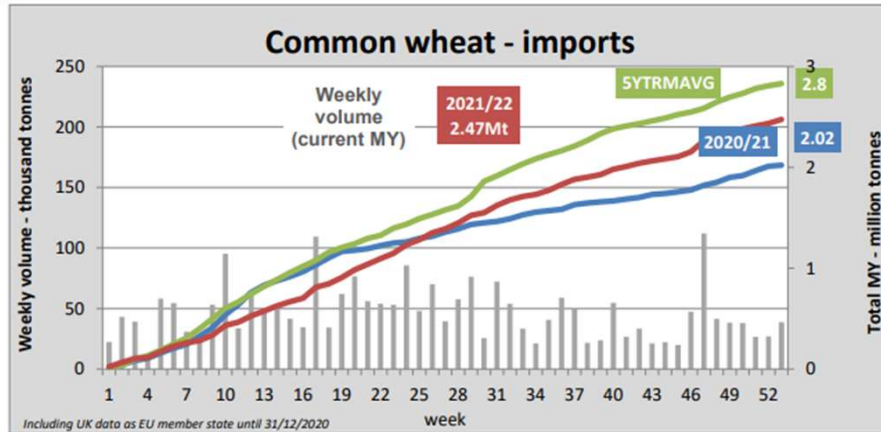
EU cereals trade – 2021/22

Cumul of weeks 1 to 53

Customs Surveillance (tonnes)	EU*		EU + UK		EU + UK	
	01/07/2021 - 30/06/2022		01/07/2020 - 30/06/2021		01/07/2019 - 30/06/2020	
	Export	Import	Export	Import	Export	Import
Common wheat	27 737 240	2 474 914	25 708 428	2 021 365	34 755 332	2 033 500
Common wheat flour (grain equivalent)	545 896	244 990	470 625	117 908	564 719	29 449
Durum wheat	971 822	1 299 846	476 384	2 836 167	981 176	2 206 867
Durum wheat meal (grain equivalent)	219 023	5 290	239 767	2 874	247 983	2 048
Total Wheat	29 473 981	4 025 041	26 895 204	4 978 314	36 549 209	4 271 865
Barley	7 094 356	880 574	7 415 391	465 940	7 624 789	580 841
Malt (grain equivalent)	3 067 452	28 447	3 222 998	21 531	2 646 598	15 152
Maize	6 074 873	16 397 658	2 833 181	15 223 937	4 939 131	19 654 085
Rye	143 754	258 890	148 432	86 288	252 487	3 249
Oats	200 313	145 838	117 583	20 046	208 293	2 953
Sorghum	15 172	153 608	9 405	14 602	2 562	82 653
Total Coarse grains	16 595 921	17 865 016	13 746 991	15 832 344	15 673 860	20 338 933
General Total	46 069 902	21 890 056	40 642 196	20 810 658	52 223 069	24 610 798

Source: TAXUD Surv. Data

EU cereals trade – 2021/22



Source: IAXUD Surv. Data

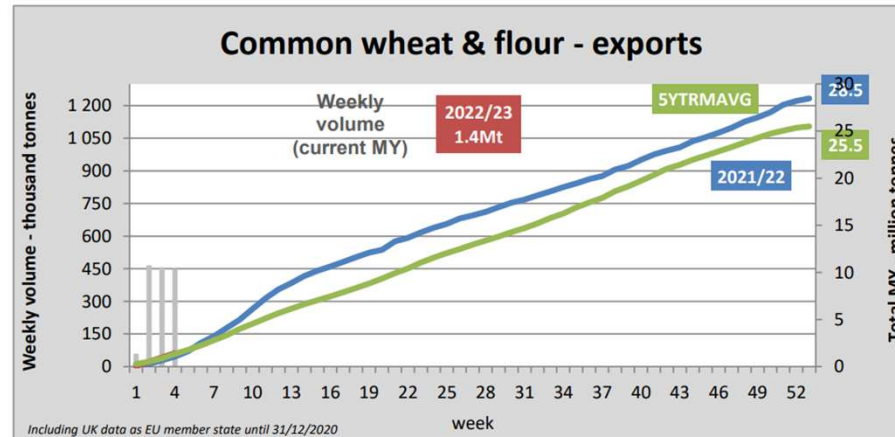
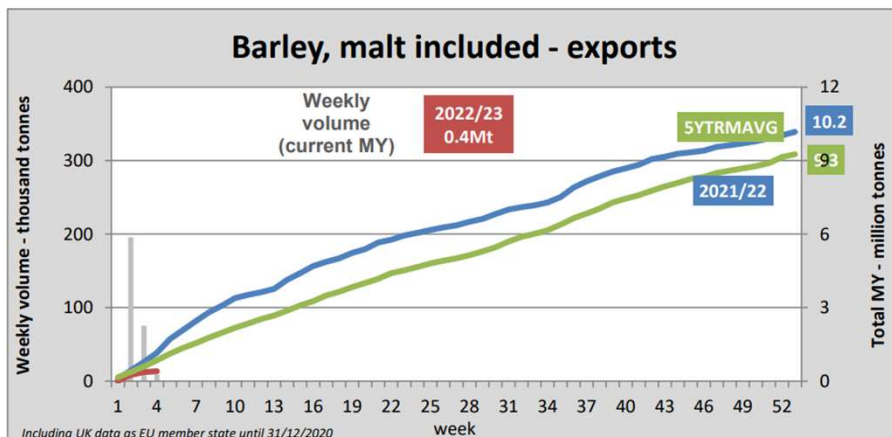
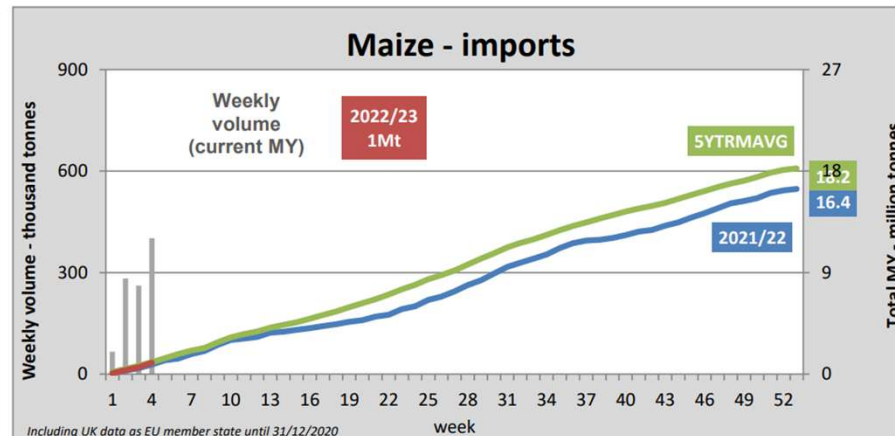
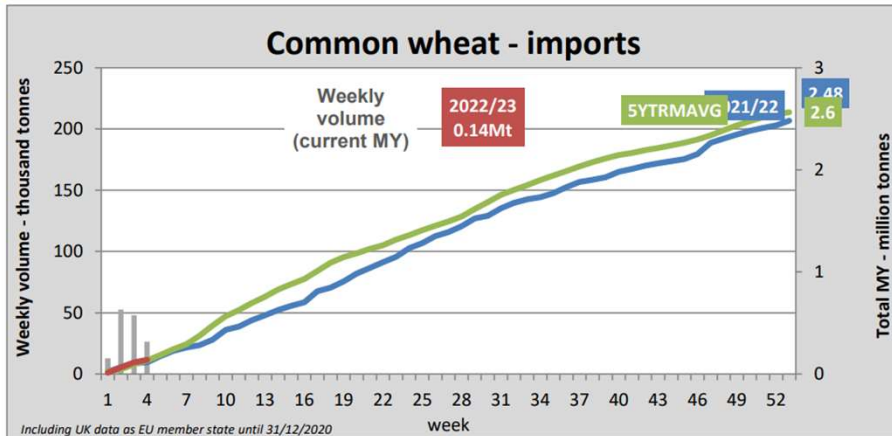
EU cereals trade – 2022/23

Cumul of weeks 1 to 4

<i>Customs Surveillance</i> (tonnes)	EU*		EU*		EU*	
	01/07/2022 - 24/07/2022		01/07/2021 - 25/07/2021		01/07/2020 - 26/07/2020	
	Export	Import	Export	Import	Export	Import
Common wheat	1 404 174	139 926	1 030 262	115 410	1 244 971	107 290
Common wheat flour (grain equivalent)	26 151	12 000	36 615	17 205	31 584	1 873
Durum wheat	17 088	2 188	13 187	204 018	14 883	228 769
Durum wheat meal (grain equivalent)	9 779	526	15 620	148	20 504	194
Total Wheat	1 457 191	154 639	1 095 685	336 781	1 311 942	338 125
Barley	280 051	65 796	1 003 064	16 769	831 663	6 902
Malt (grain equivalent)	122 714	1 384	159 288	4 462	126 975	271
Maize	71 810	1 011 395	95 311	851 358	37 912	815 972
Rye	118	1 754	2 249	21 461	6 306	2
Oats	2 425	13 633	20 925	506	10 274	154
Sorghum	189	5 733	584	1 044	99	5 531
Total Coarse grains	477 307	1 099 695	1 281 420	895 599	1 013 228	828 832
General Total	1 934 498	1 254 334	2 377 104	1 232 380	2 325 171	1 166 957

Source: TAXUD Surv. Data

EU cereals trade – 2022/23



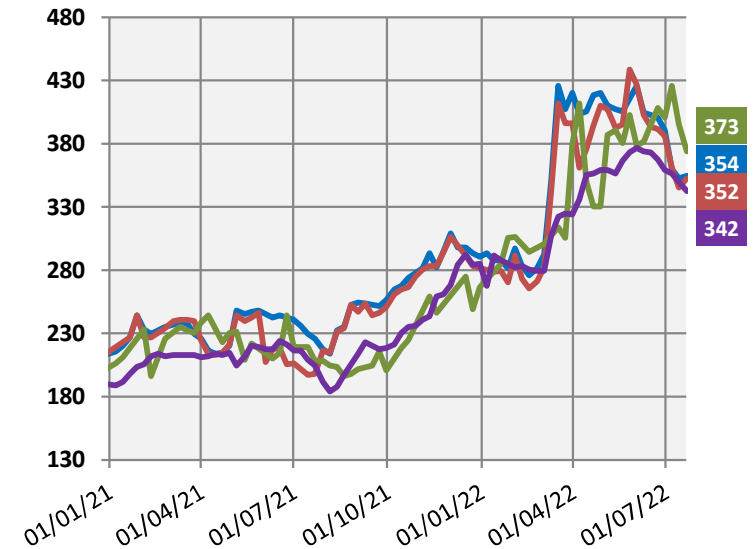
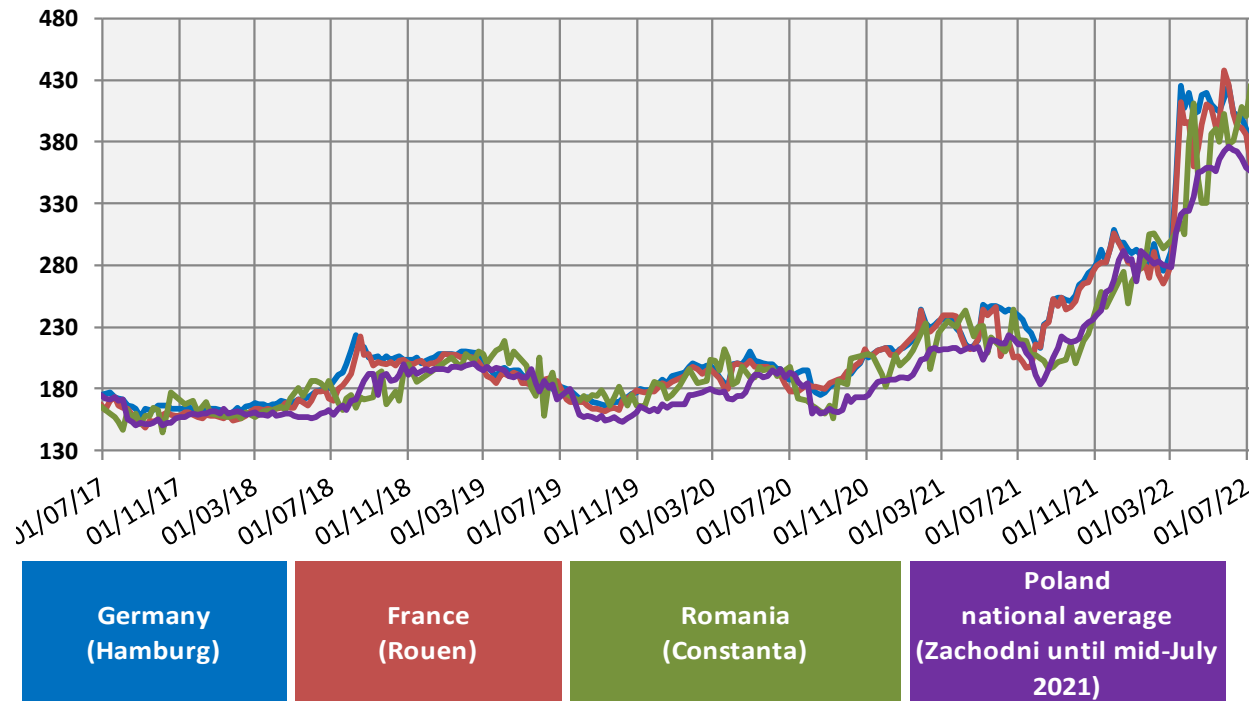
EU cereals trade – 2022/23

Maize				
Origin	MY 2022/23		MY 2021/22	
	tonnes	share	tonnes	share
Ukraine	573 353	56.7%	335 484	39.4%
Brazil	297 369	29.4%	238 367	28.0%
Canada	63 714	6.3%	138 175	16.2%
Serbia	39 518	3.9%	65 065	7.6%
Moldova	24 835	2.5%	14 894	1.7%

Common wheat				
Destination	MY 2022/23		MY 2021/22	
	tonnes	share	tonnes	share
Morocco	433 841	30.9%	27 208	2.6%
Jordan	142 308	10.1%	58 270	5.7%
Algeria	132 841	9.5%	57 144	5.5%
Saudi Arabia	115 050	8.2%	-----	-----
South Africa	100 130	7.1%	-----	-----

Source: TAXUD Surv. Data

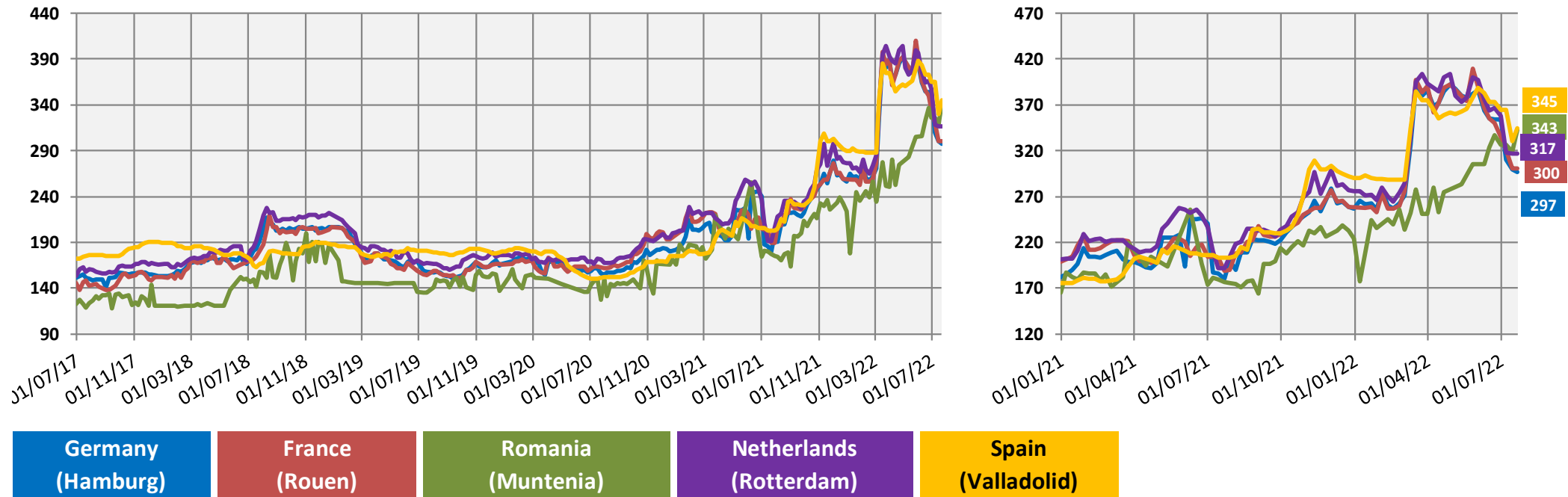
EU market prices for milling wheat – (EUR per tonne)



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

Romania (FOB Constanta) • EUR 373 per tonne; -8.5% month-on-month; +79.9% year-on-year

EU market prices for feed barley – (EUR per tonne)

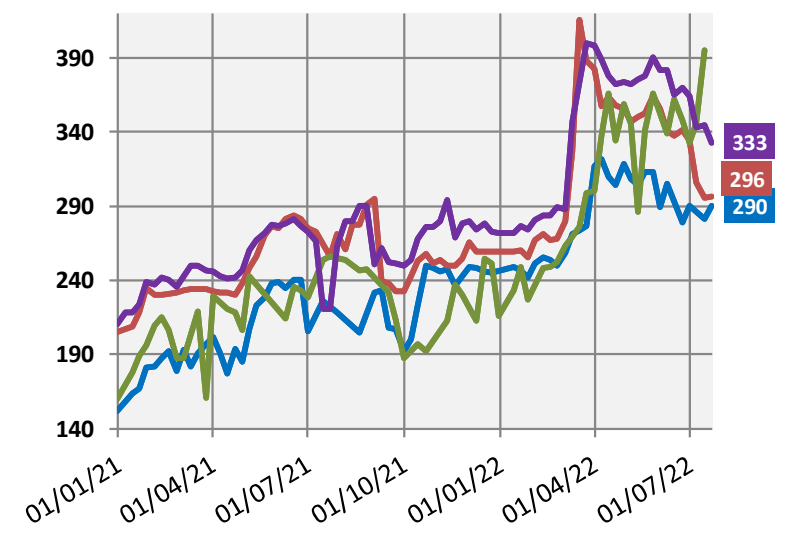
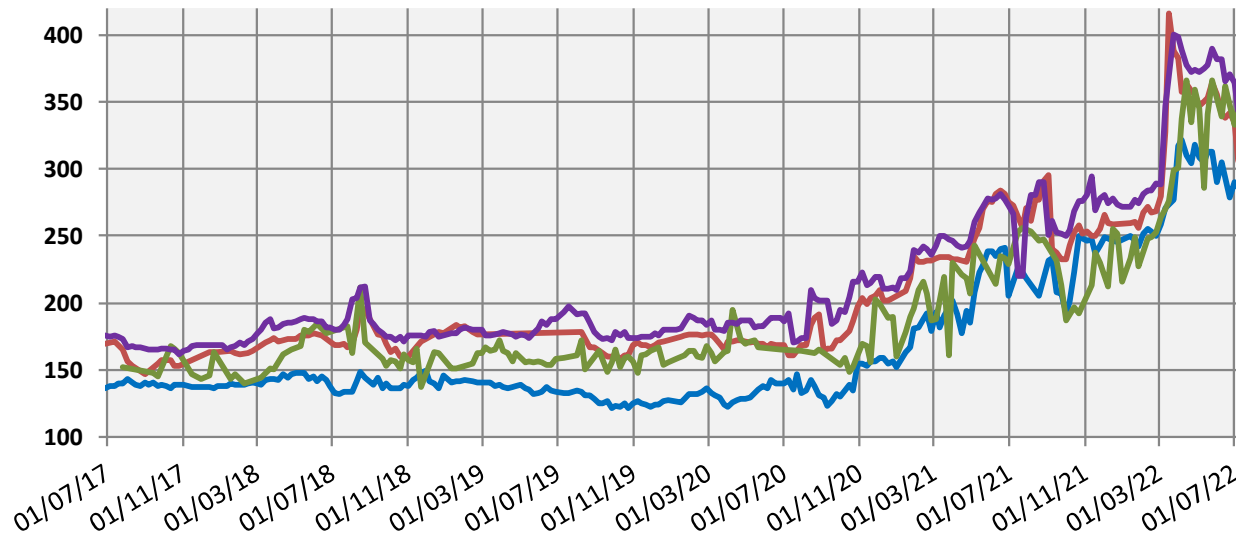


Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

France
(DELPORT Rouen)

• EUR 300 per tonne; -14.2% month-on-month; +58.9% year-on-year

EU market prices for maize – (EUR per tonne)

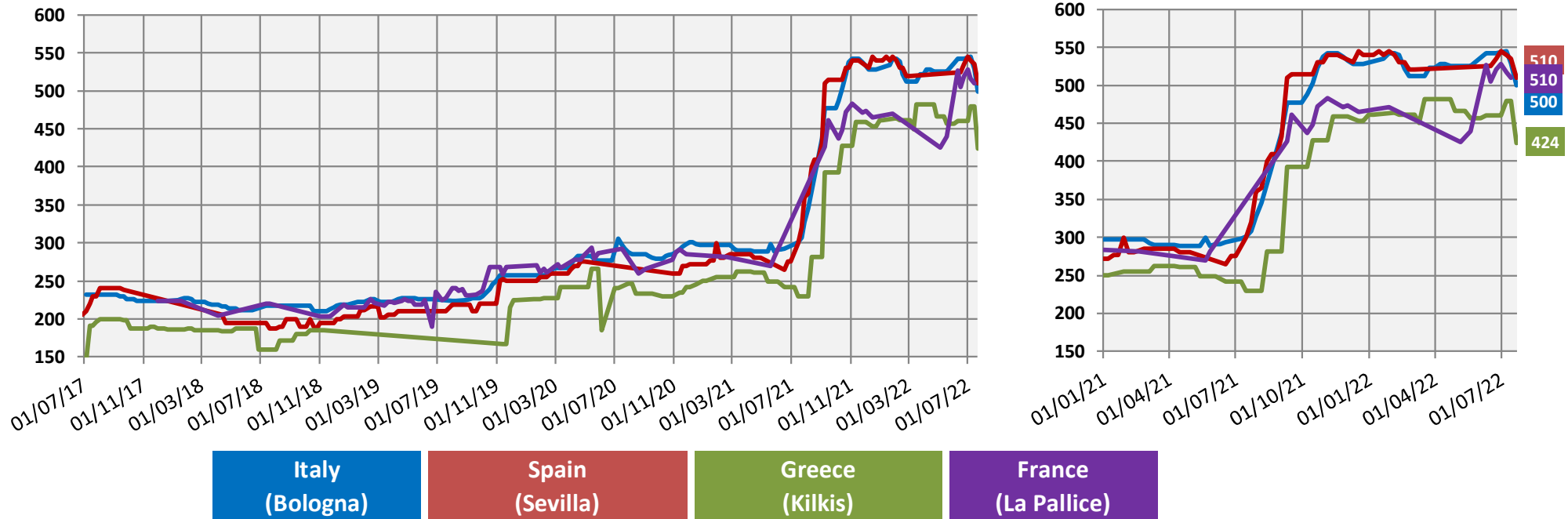


Hungary (Great Plain)	France (Rhin)	Romania (Constanta)	Netherlands (Rotterdam)
--------------------------	------------------	------------------------	----------------------------

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

France (FOB Rhin)	• EUR 296 per tonne; -13.2% month-on-month; +15.6% year-on-year
-----------------------------	---

EU market prices for durum wheat – (EUR per tonne)



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

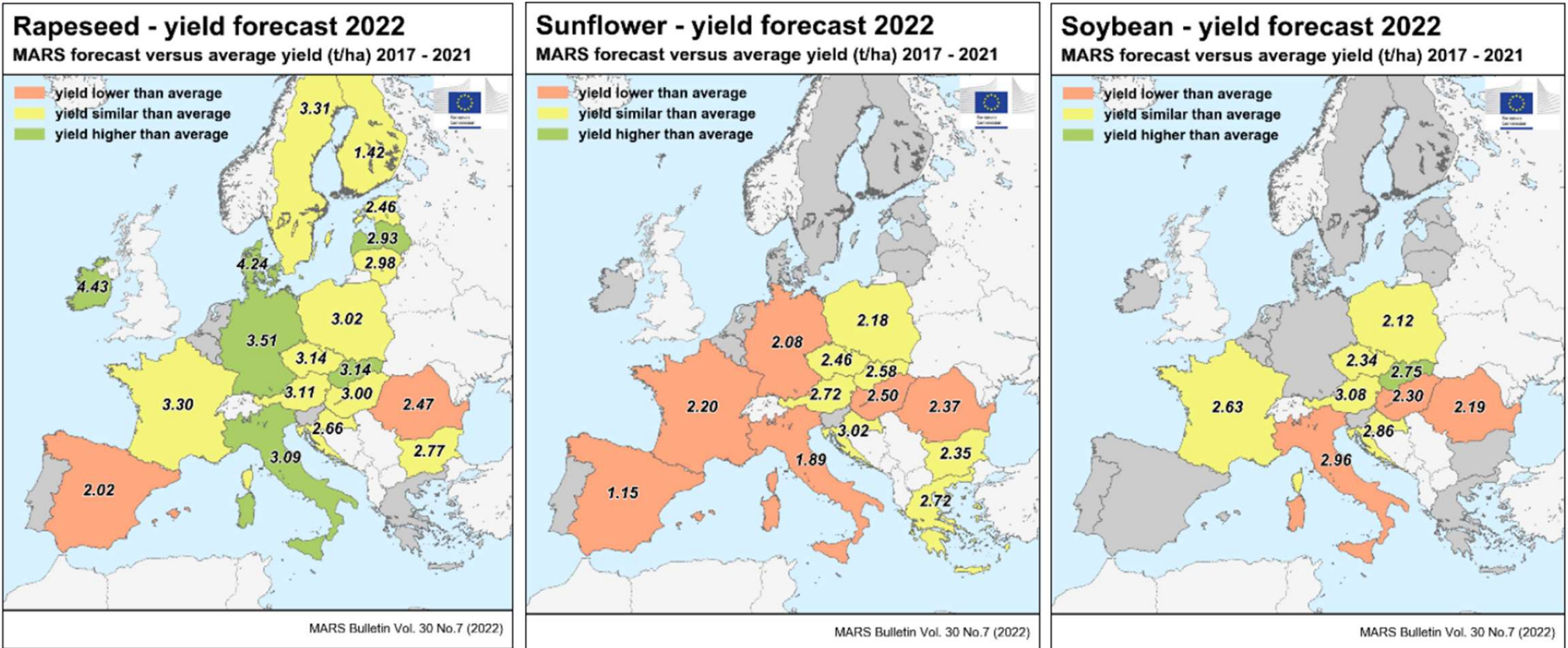
Greece (FGATE Kilkis) • EUR 424 per tonne; -7.8% month-on-month; +84.3% year-on-year

Price evolution compared to the week of 14 February

<i>EUR/tonne</i>	Week of 11 July	% change -1yr	% change compared to the week before the invasion
Milling wheat			
France - Rouen (DELPOR)	352	77.9%	29.9%
Germany - Hamburg (DEPSILO)	354	57.3%	26.0%
Feed wheat			
Germany - Hamburg (DEPSILO)	347	54.2%	25.0%
Netherlands - Rotterdam (CIF)	348	68.7%	21.7%
Feed barley			
Romania - Muntenia (DEPSILO)	343	94.1%	33.9%
France - Rouen (DELPOR)	300	58.9%	15.7%
Maize			
France - Rhin (FOB)	296	15.6%	10.4%
Hungary - Great Plain (FGATE)	290	30.3%	15.9%

Oilseeds

EU oilseeds yield forecast from JRC



EU oilseeds trade – 2021/22

Cumul of week 1 to 53

(tonnes)	EU*		EU + UK		EU + UK	
	01/07/2021 - 30/06/2022		01/07/2020 - 30/06/2021		01/07/2019 - 30/06/2020	
	Export	Import	Export	Import	Export	Import
Soyabeans	272,820	14,536,004	181,066	15,424,529	206,515	15,363,646
Rapeseed	452,254	5,518,814	99,768	6,508,775	29,703	6,009,330
Sunflowerseed	397,369	1,065,189	620,400	876,698	473,427	1,053,602
Total seeds	1,122,443	21,120,008	901,235	22,810,002	709,646	22,426,578
Soyameal	830,582	16,500,086	624,830	17,269,643	469,179	18,085,336
Rapeseed meal	737,979	561,245	580,445	440,814	481,054	333,201
Sunflowerseed meal	844,472	2,419,792	508,547	3,777,842	444,906	3,249,606
Total meals	2,413,033	19,481,123	1,713,823	21,488,299	1,395,140	21,668,144
Soyaoil	1,040,811	504,125	880,008	474,403	726,904	455,101
Rapeseed oil	321,208	603,339	623,111	263,232	300,862	280,694
Sunflowerseed oil	733,949	1,949,793	596,003	1,719,669	558,002	2,336,644
Palm oil	175,900	4,802,202	118,080	5,439,683	113,107	5,836,989
Total oils	2,271,869	7,859,459	2,217,202	7,896,988	1,698,875	8,909,428
General Total	5,807,345	48,460,590	4,832,259	52,195,290	3,803,660	53,004,150

Source: TAXUD Surv. Data

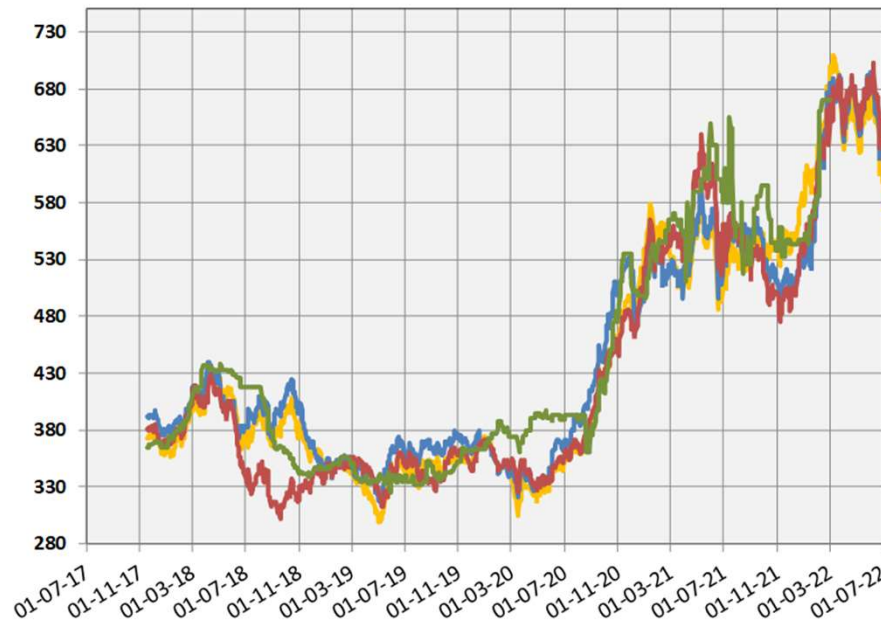
EU oilseeds trade – 2022/23

Cumul of week 1 to 4

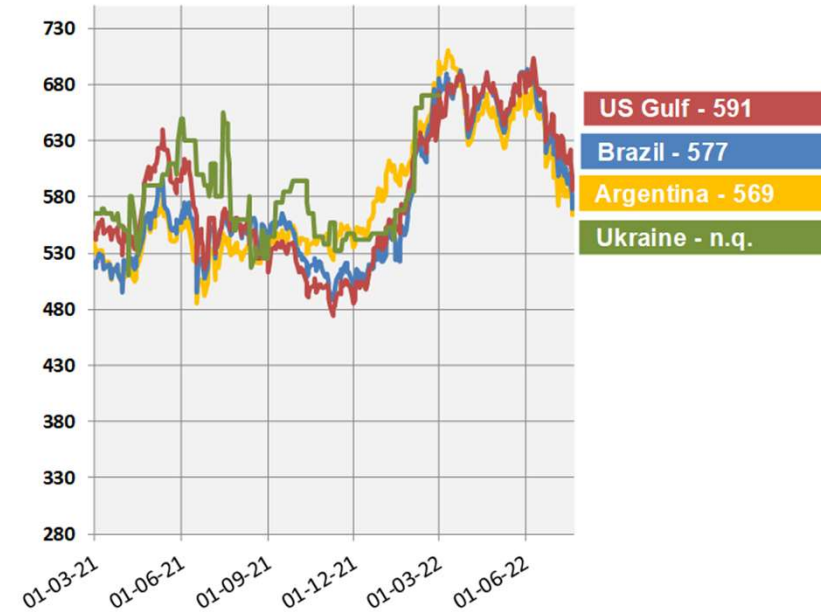
(tonnes)	EU*		EU*		EU + UK	
	01/07/2022 - 24/07/2022		01/07/2021 - 25/07/2021		01/07/2020 - 26/07/2020	
	Export	Import	Export	Import	Export	Import
Soyabeans	2 164	890 412	1 869	966 648	1 671	1 030 274
Rapeseed	15 131	379 555	66 063	252 202	2 206	117 612
Sunflowerseed	9 733	200 447	13 255	11 968	11 769	27 803
Total seeds	27 027	1 470 414	81 187	1 230 819	15 646	1 175 690
Soyameal	42 947	1 016 501	52 386	854 907	34 125	1 292 127
Rapeseed meal	30 611	23 464	32 875	34 669	28 928	15 713
Sunflowerseed meal	37 079	83 865	66 676	120 265	14 992	195 625
Total meals	110 637	1 123 830	151 938	1 009 841	78 045	1 503 466
Soyaoil	52 954	16 892	82 145	44 616	32 525	37 959
Rapeseed oil	28 947	19 594	14 750	18 770	40 983	10 444
Sunflowerseed oil	47 446	96 673	33 476	112 683	58 982	206 284
Palm oil	16 849	111 419	16 174	411 218	4 394	465 888
Total oils	146 195	244 579	146 545	587 287	136 884	720 575
General Total	283 859	2 838 823	379 670	2 827 947	230 575	3 399 730

Source: TAXUD Surv. Data

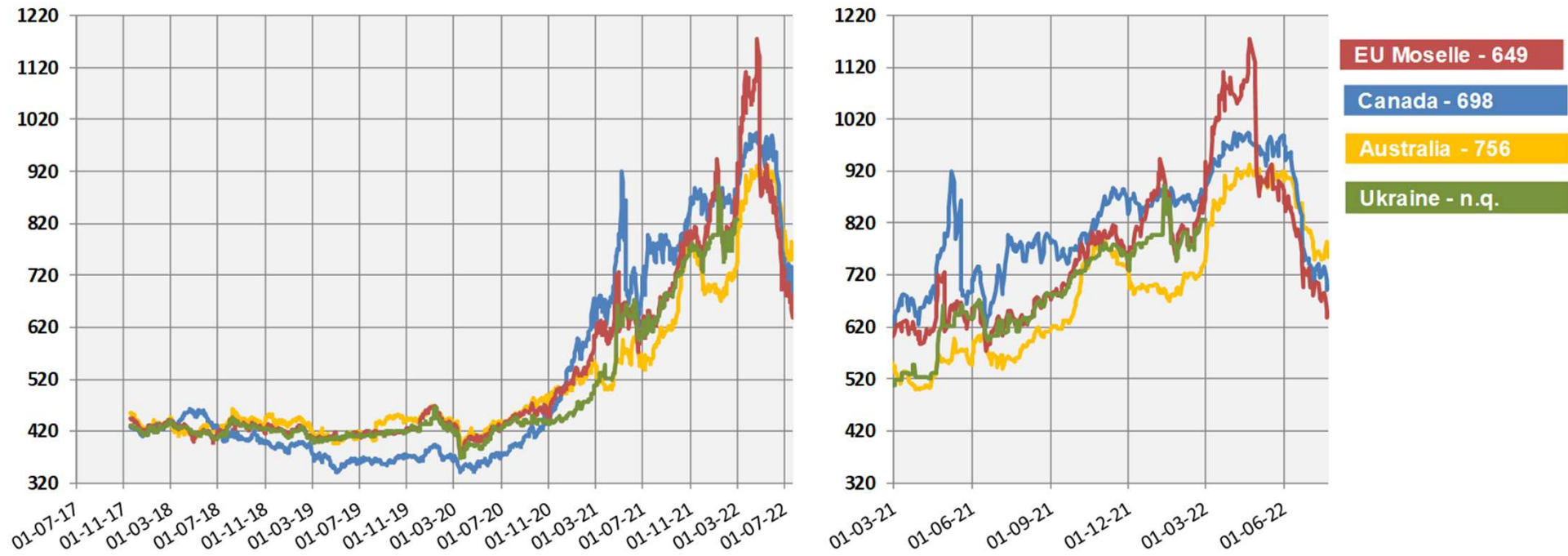
World export prices for soya beans – (USD/tonne)



Source: International Grains Council
Latest prices referring to: 22-07-2022



World export prices for rapeseed – (USD/tonne)



Source: International Grains Council
Latest prices referring to: 22-07-2022

World export prices for sunflower – (USD/tonne)



Source: International Grains Council
Latest prices referring to: 22-07-2022

World export prices for vegetable oils – (USD/tonne)

One day before Russia's invasion of Ukraine

<i>fob, US\$/t</i>	25 July 2022	%change compared to the day before the invasion	23 February 2022	%change -1yr
Soya oil				
Argentina	1276	-22%	1630	50%
Brazil	1275	-21%	1610	50%
US (Gulf)	1478	-11%	1653	45%
Rapeseed oil				
Canada (Vancouver)	n/a	n/a	1751	29%
Sunflower oil				
Argentina	1500	1%	1490	12%
Ukraine	n/a	n/a	1475	5%
Palm oil				
Indonesia	1000	-39%	1630	52%
Malaysia	973	-40%	1618	58%

Source: IGC

Point 2

Ukraine cereals yields forecast from JRC

BELARUS, TURKEY, UKRAINE and UK yield forecasts - July 2022 Bulletin

Country	WHEAT (t/ha)					BARLEY (t/ha)				
	Avg 5yrs	2021	MARS 2022 forecasts	%22/5yrs	%22/21	Avg 5yrs	2021	MARS 2022 forecasts	%22/5yrs	%22/21
BY	3.45	3.54	3.62	+ 4.8	+ 2.2	2.85	2.86	3.32	+ 17	+ 16
TR	2.79	2.66	2.90	+ 4.0	+ 9.0	2.53	1.87	2.56	+ 1.1	+ 37
UA	4.07	4.53	4.11	+ 0.9	- 9.3	3.35	3.82	3.34	- 0.2	- 13
UK	8.03	7.80	7.94	- 1.2	+ 1.8	6.15	6.09	6.23	+ 1.3	+ 2.3

Country	GRAIN MAIZE (t/ha)					SOYBEAN (t/ha)				
	Avg 5yrs	2021	MARS 2022 forecasts	%22/5yrs	%22/21	Avg 5yrs	2021	MARS 2022 forecasts	%22/5yrs	%22/21
BY	5.58	5.31	5.76	+ 3.3	+ 8.5	—	—	—	—	—
TR	9.30	8.90	9.35	+ 0.5	+ 5.0	4.29	4.15	4.60	+ 7.2	+ 11
UA	6.76	7.68	7.14	+ 5.5	- 7.1	2.29	2.64	2.39	+ 4.5	- 9.4
UK	—	—	—	—	—	—	—	—	—	—

NB: Yields are forecast for crops with more than 10 000 ha per country with sufficiently long and coherent yield time series.

Sources: 2017-2021 data come from USDA, Turkish Statistical Institute (TurkStat), Eurostat Eurobase (last update: 07.07.2022), Ministry for Development of Economy, Trade and Agriculture of Ukraine, Department for Environment, Food & Rural Affairs of UK (DEFRA), FAO and PSD-online.

Source: JRC Bulletin July 2022

Ukraine production and exports projections for 2022/23

- IGC: wheat 19,4 million, maize – 25,1 million (wheat exports - 10 million, maize exports - 12 million)
- USDA: wheat - 19,5 million, maize - 25 million (wheat exports - 10 million, maize exports - 9 million)

Thank you



© European Union 2020

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

Slide xx: [element concerned](#), source: [e.g. Folia.com](#); Slide xx: [element concerned](#), source: [e.g. iStock.com](#)

