

Civil Dialogue Group RICE

13 December 2018

EU RICE MARKET

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European Commission
DG AGRI**



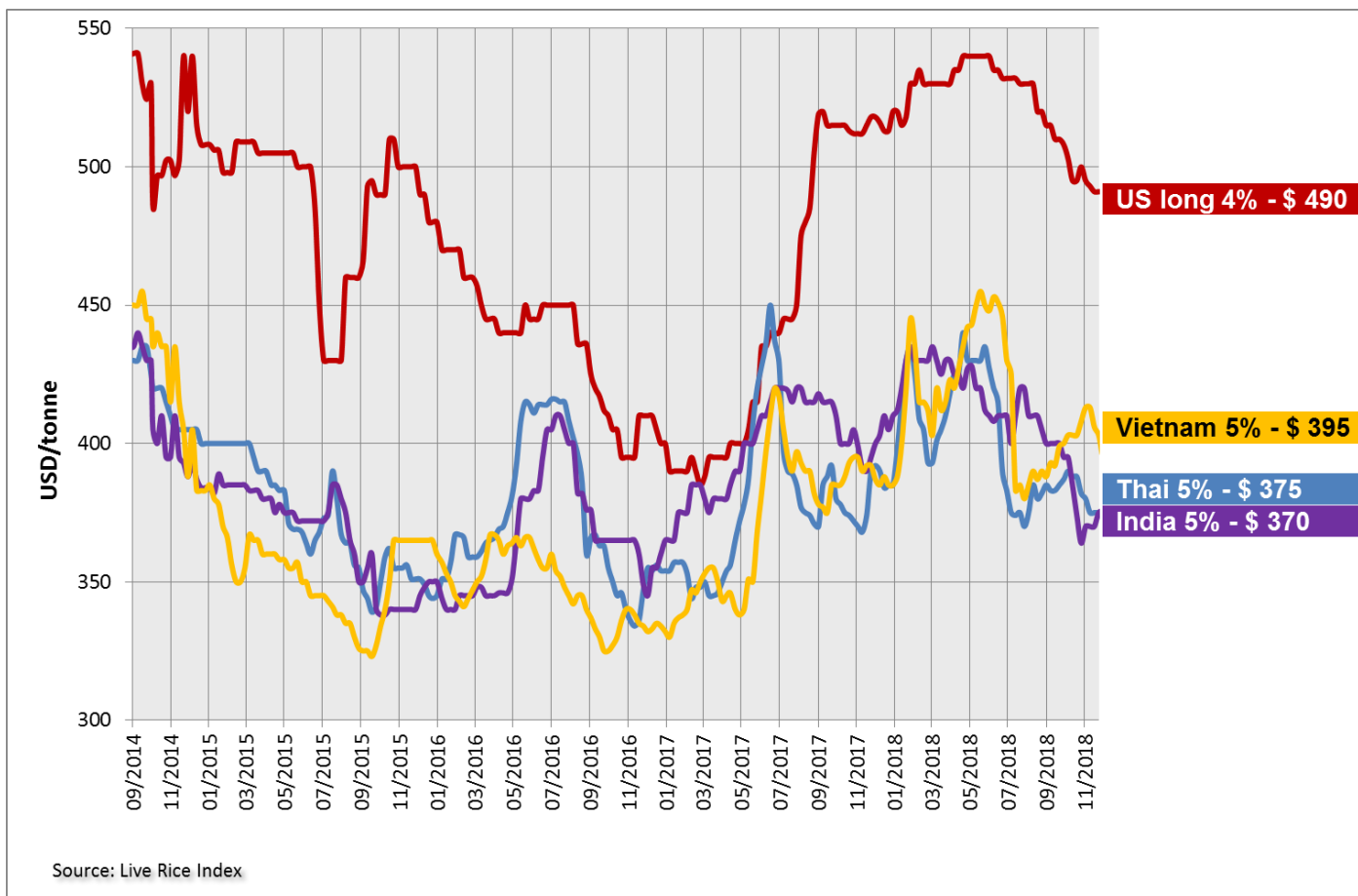
World market situation and EU rice prices

2018/19 Rice world market forecasts (source: AMIS Market Monitor Dec 2018)

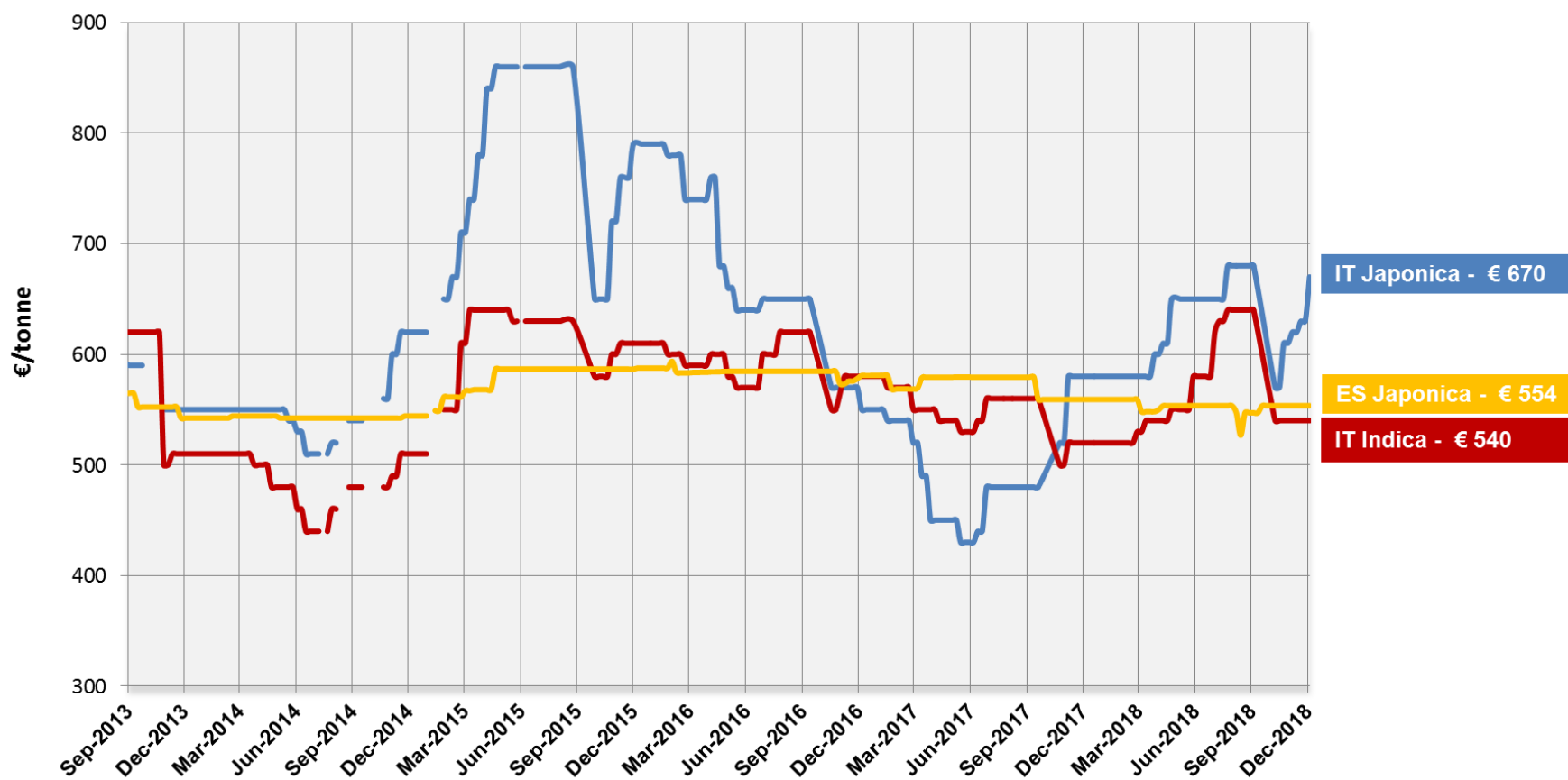
- **Production:**
512.9 Mio t (+1.3%)
- **Use:**
508.8 Mio t (+1%)
- **Trade:**
47.2 Mio t (-1.4%)
- **End Stocks:**
176.7 Mio t (+2,7%)

<u>RICE</u> (milled)	FAO-AMIS			USDA		IGC	
	2017/18	2018/19	2018/19	2017/18	2018/19	2017/18	2018/19
Production	506.3	513.0	512.9	494.3	490.7	490.5	490.6
	363.4	371.7	371.6	345.4	347.1	345.5	344.6
Supply	674.3	685.0	685.0	643.3	651.4	613.9	617.4
	432.7	440.7	440.7	395.9	398.8	392.5	395.9
Utilization	503.8	509.2	508.8	482.5	488.4	487.2	492.7
	360.6	365.5	365.1	340.0	345.6	342.2	346.7
Trade	47.9	47.3	47.2	48.7	49.2	47.6	48.6
	42.6	42.3	42.2	43.7	44.2	42.4	43.6
Stocks	172.1	176.6	176.7	160.7	163.0	126.8	124.4
	69.1	72.5	72.6	51.7	50.0	52.1	50.8

International Rice Prices

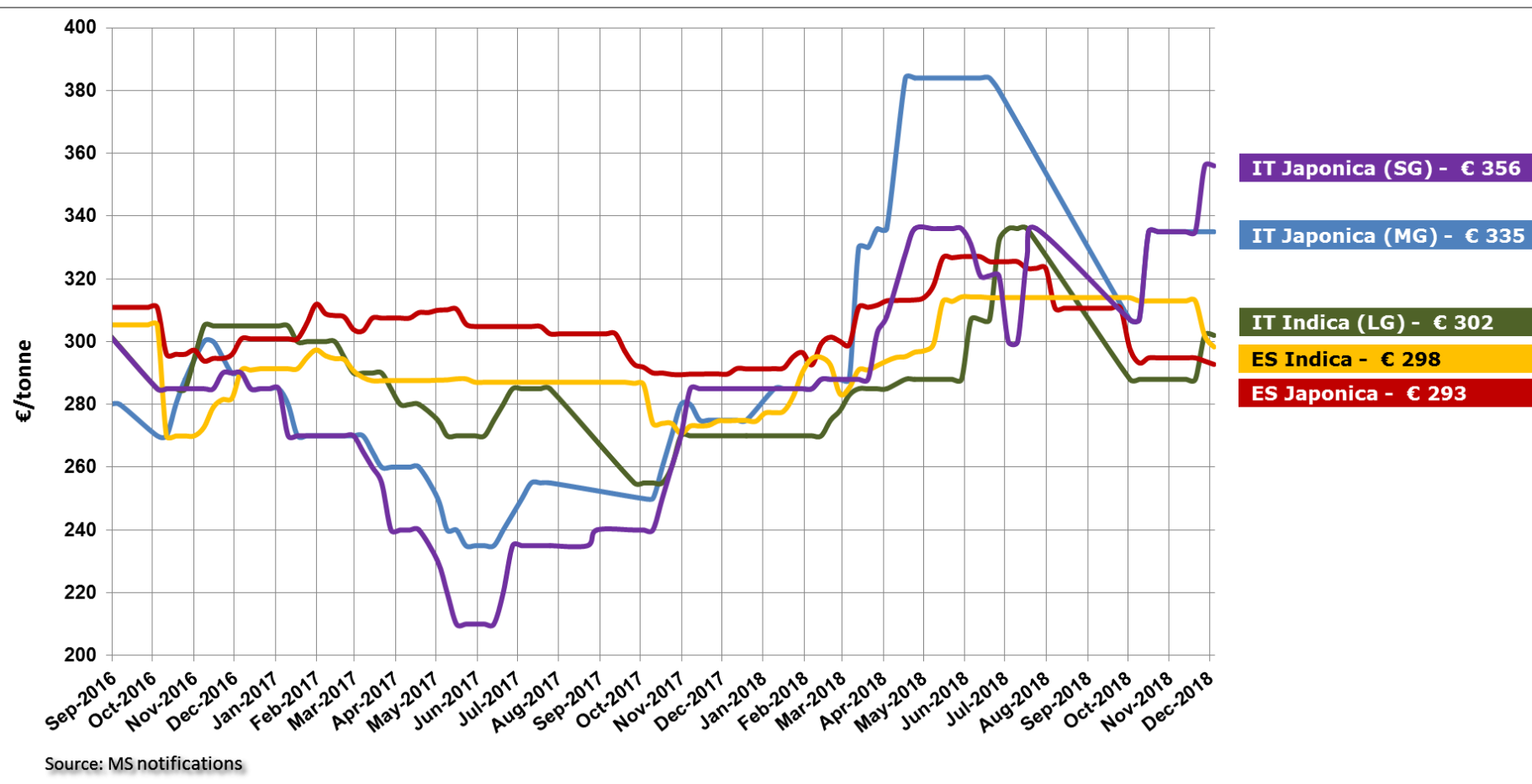


EU Rice Market Prices (milled)



Source: MS notifications

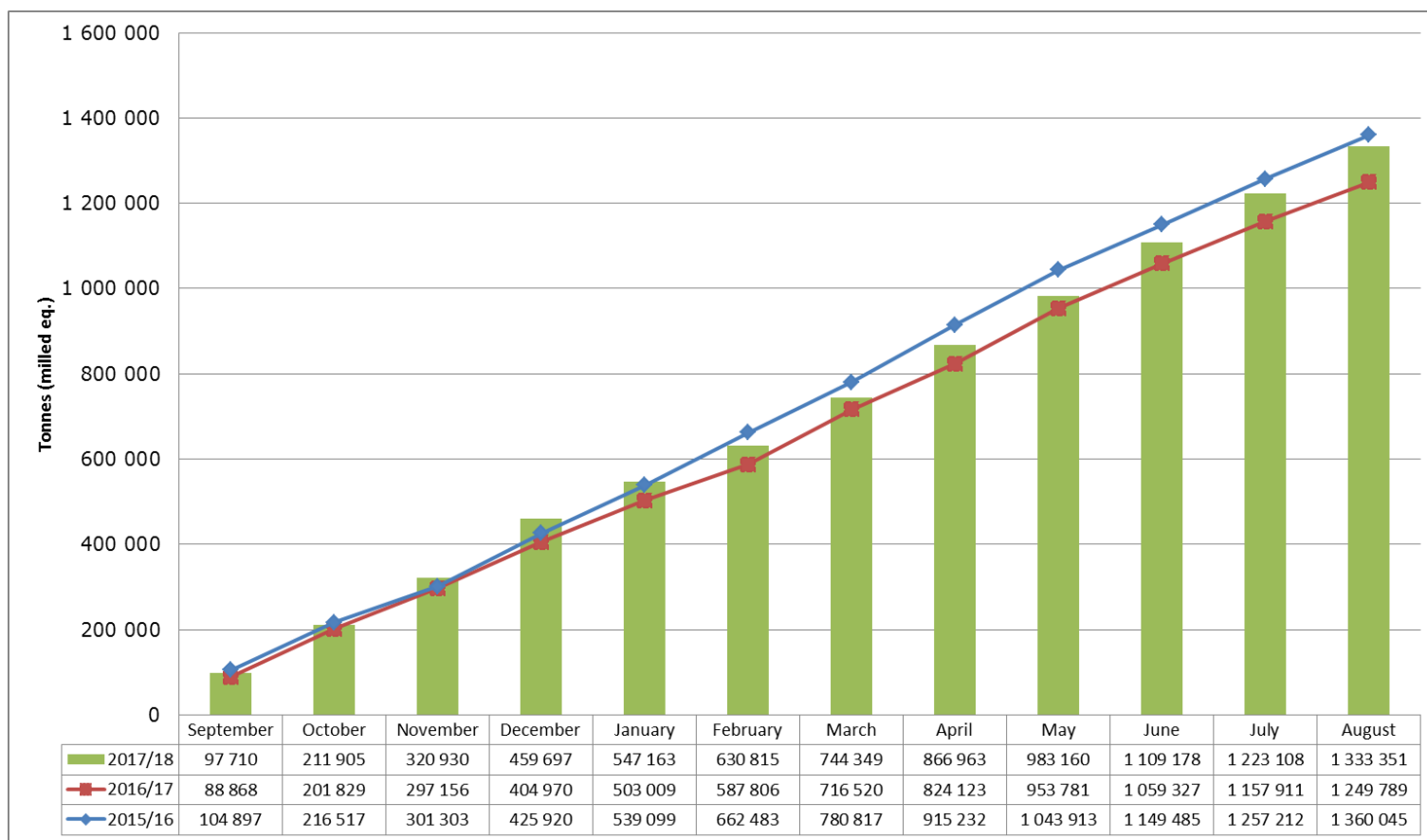
EU Rice Market Prices (paddy)



EU Rice Imports MY 2017/18:

- Total rice imports**
- ACP rice imports**
- EBA rice imports**
- Imports of rice in packages < 20 kg**
- Husked basmati**
- Total rice imports Sep-Oct 2018/19**

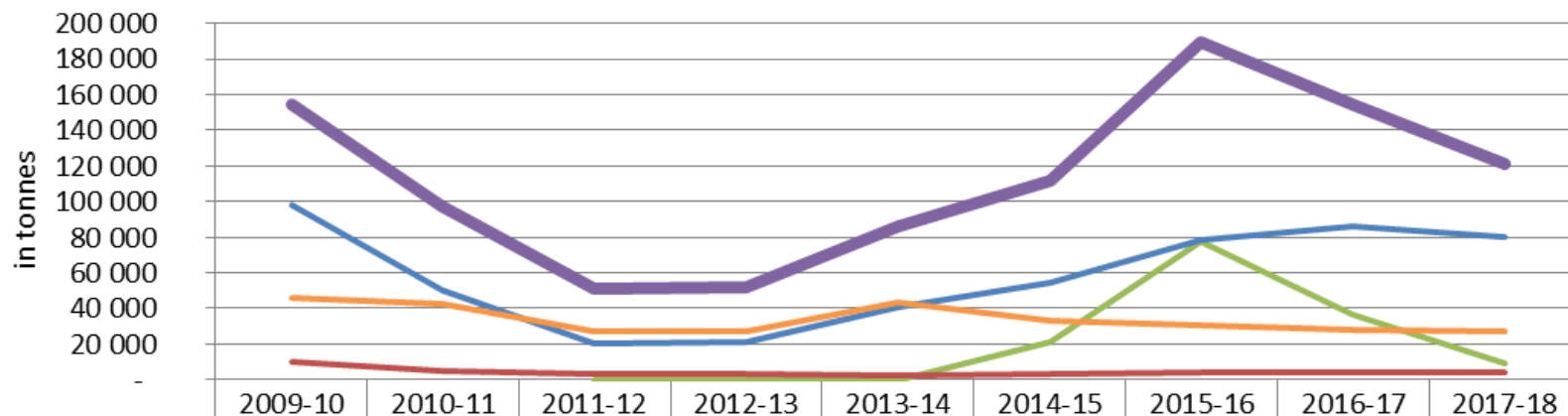
Total EU Rice Imports Sep – August 2017/18: + 7 % vs Sep - Aug 2016/17



EU Rice Imports from ACP countries since 2009/10

MY 2017/18: -22% vs 2016/17

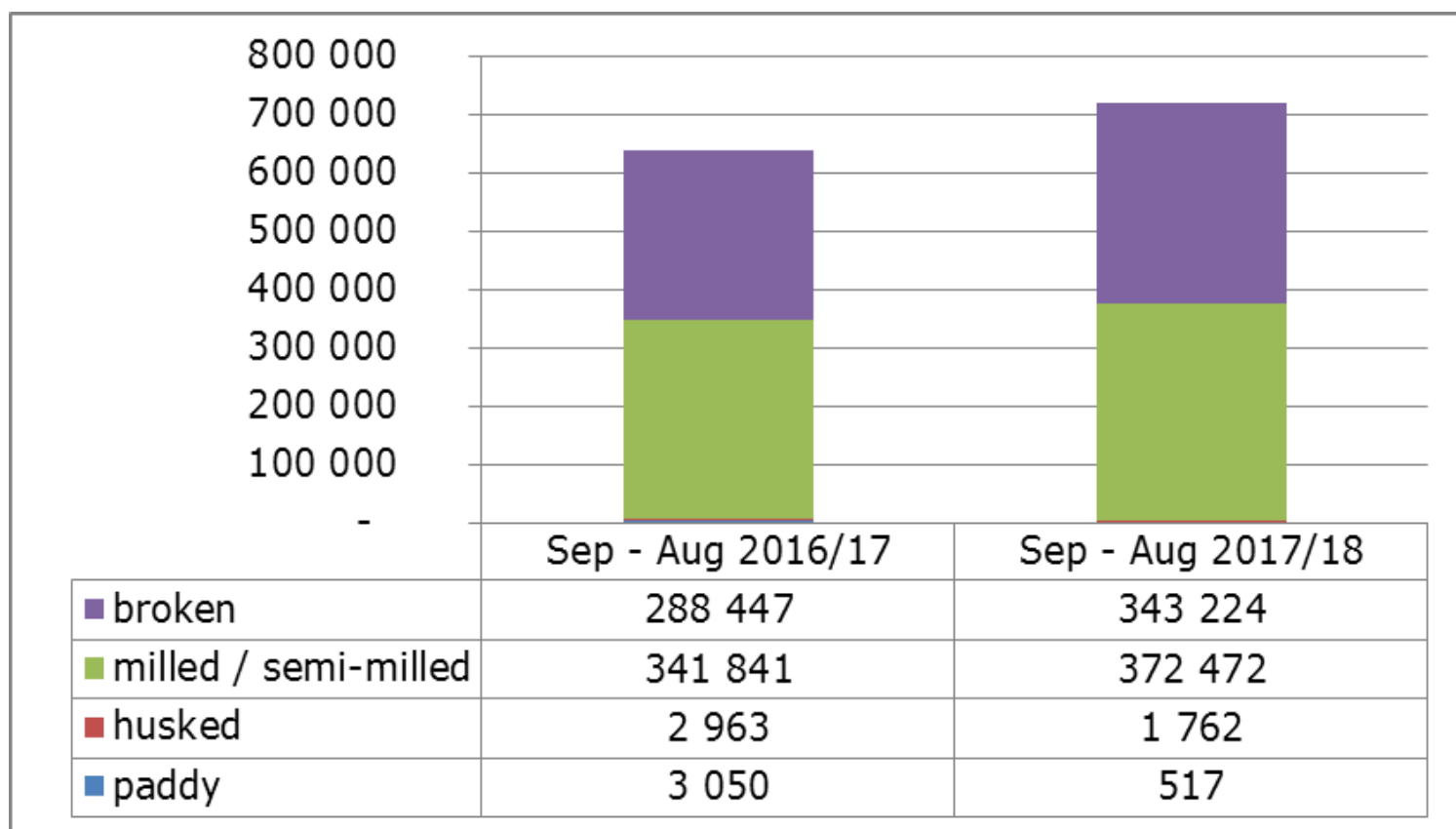
ACP rice imports (milled equivalent, all types)



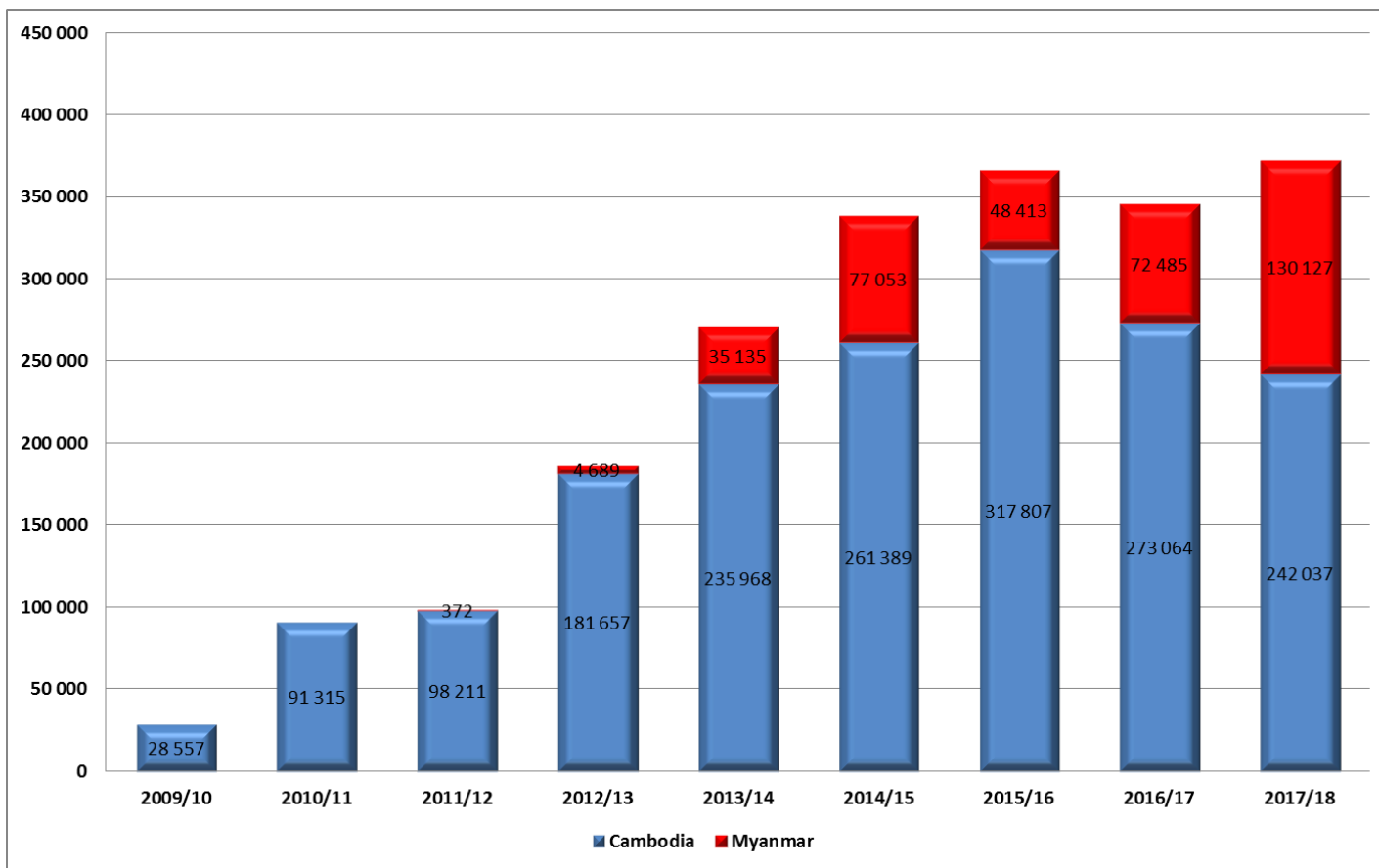
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
paddy	237		33	72	22	20 833	77 249	36 246	9 255
husked	98 451	50 004	20 712	21 003	40 832	54 418	78 133	86 236	80 497
milled/semi-milled	10 100	4 550	3 341	3 003	2 611	2 998	4 190	4 090	4 429
broken	45 918	42 950	26 979	27 448	42 986	33 578	30 238	27 763	26 798
Grand Total	154 707	97 503	51 065	51 527	86 451	111 827	189 810	154 335	120 980

EBA milled rice imports: UP 8 % in 2017/18

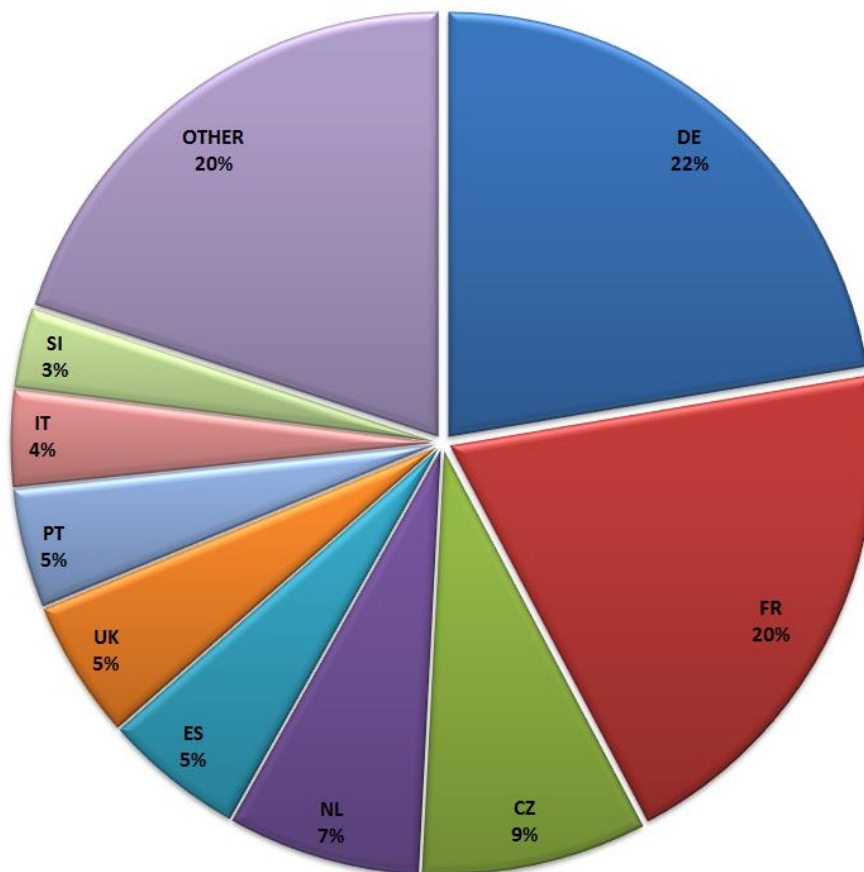
Sep-Aug 2017/18: 374 751 t (milled eq, excl broken)



EBA Imports of rice (milled eq. excl broken) from Cambodia and Myanmar since marketing year 2009/10

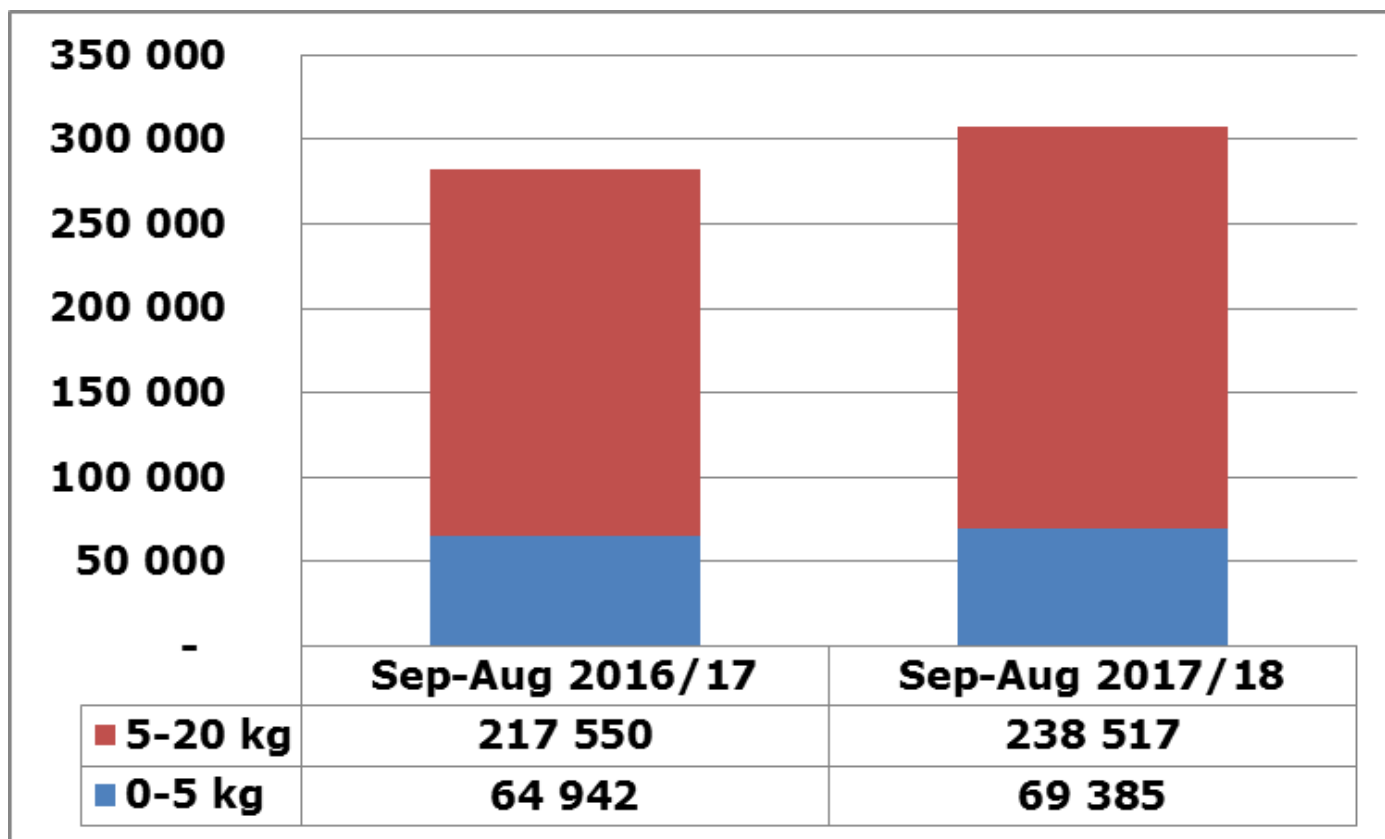


EBA Imports – Destination MY 2017/18 : 374 751 t milled eq. excl. broken

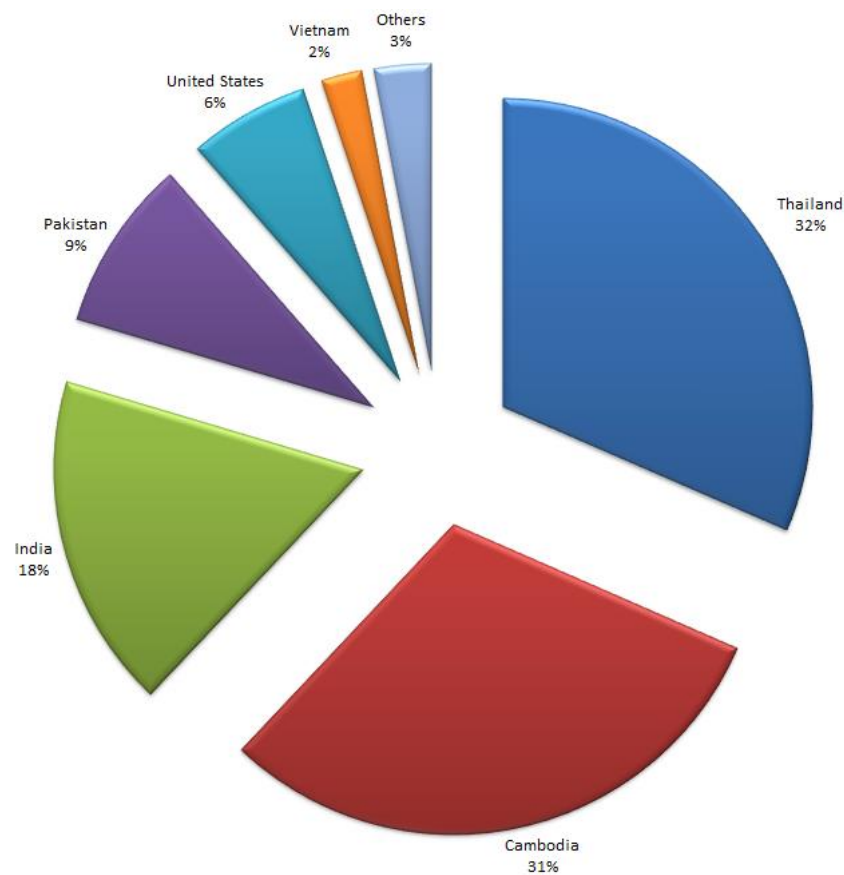


EU Rice Imports – Small packages (< 20kg)

MY 2017/18: +10% vs 2016/17

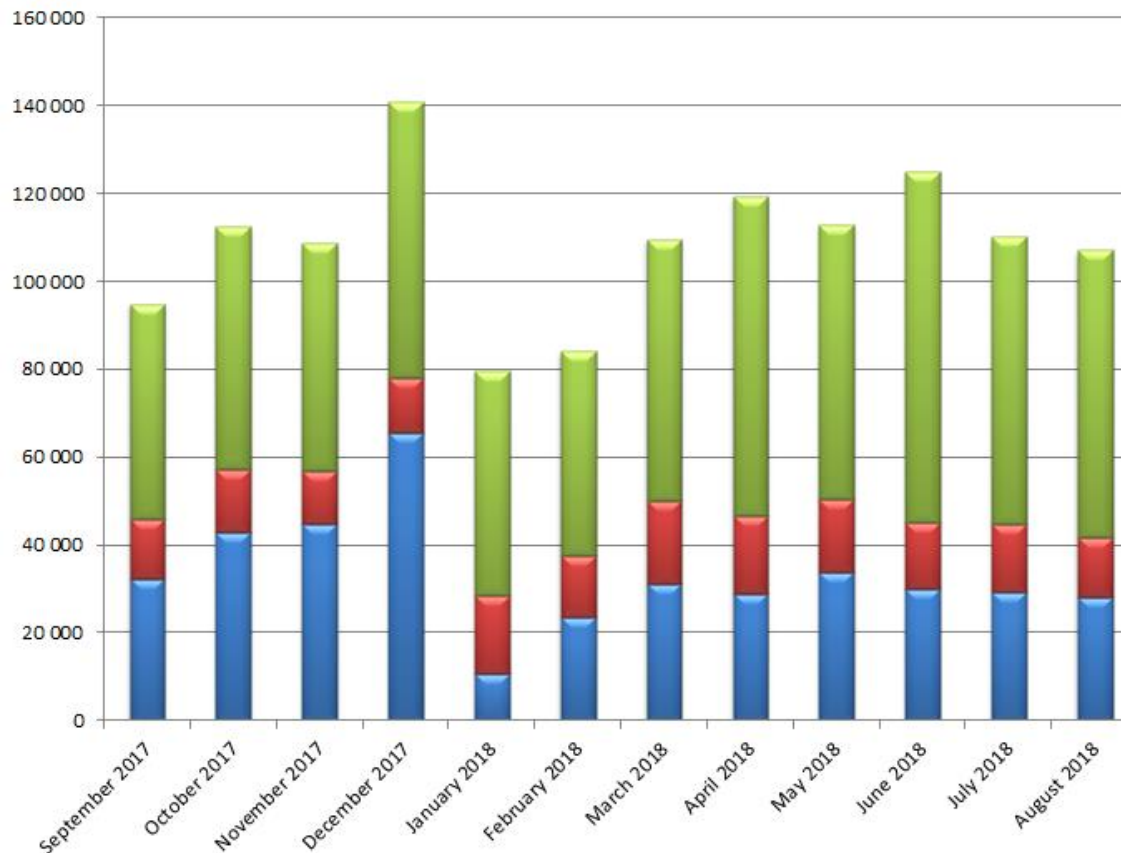
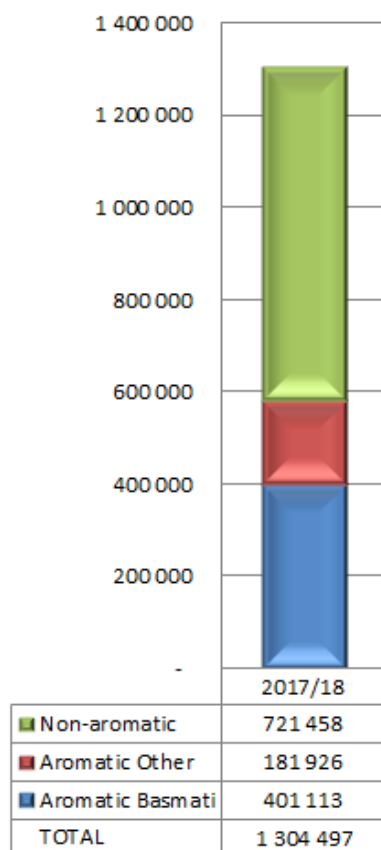


EU Rice Imports – Origins Small packages (< 20kg) MY 2017/18



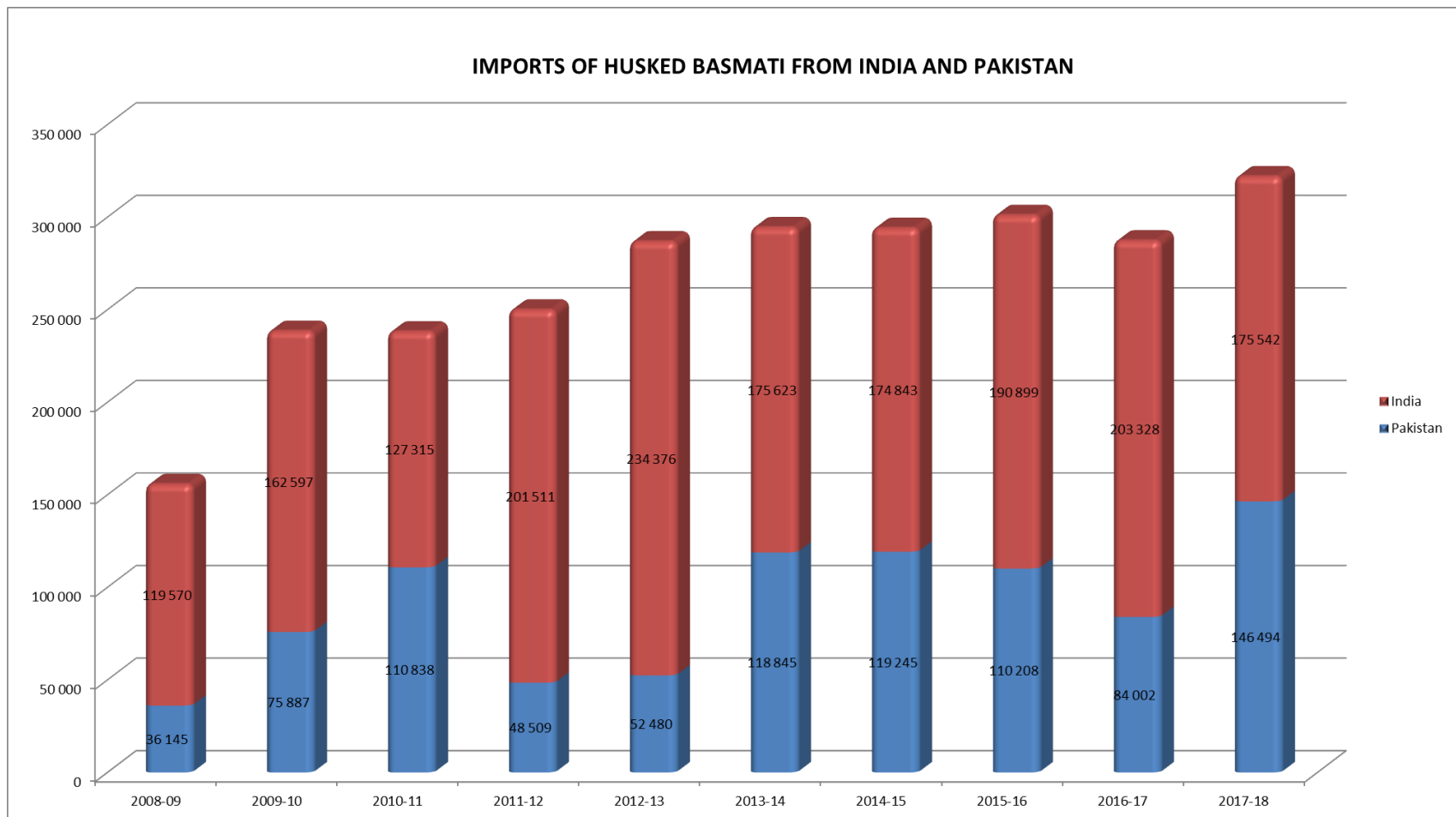
Aromatic rice imports MY 2017/18

Non-aromatic: 55%, Aromatic Basmati: 30%

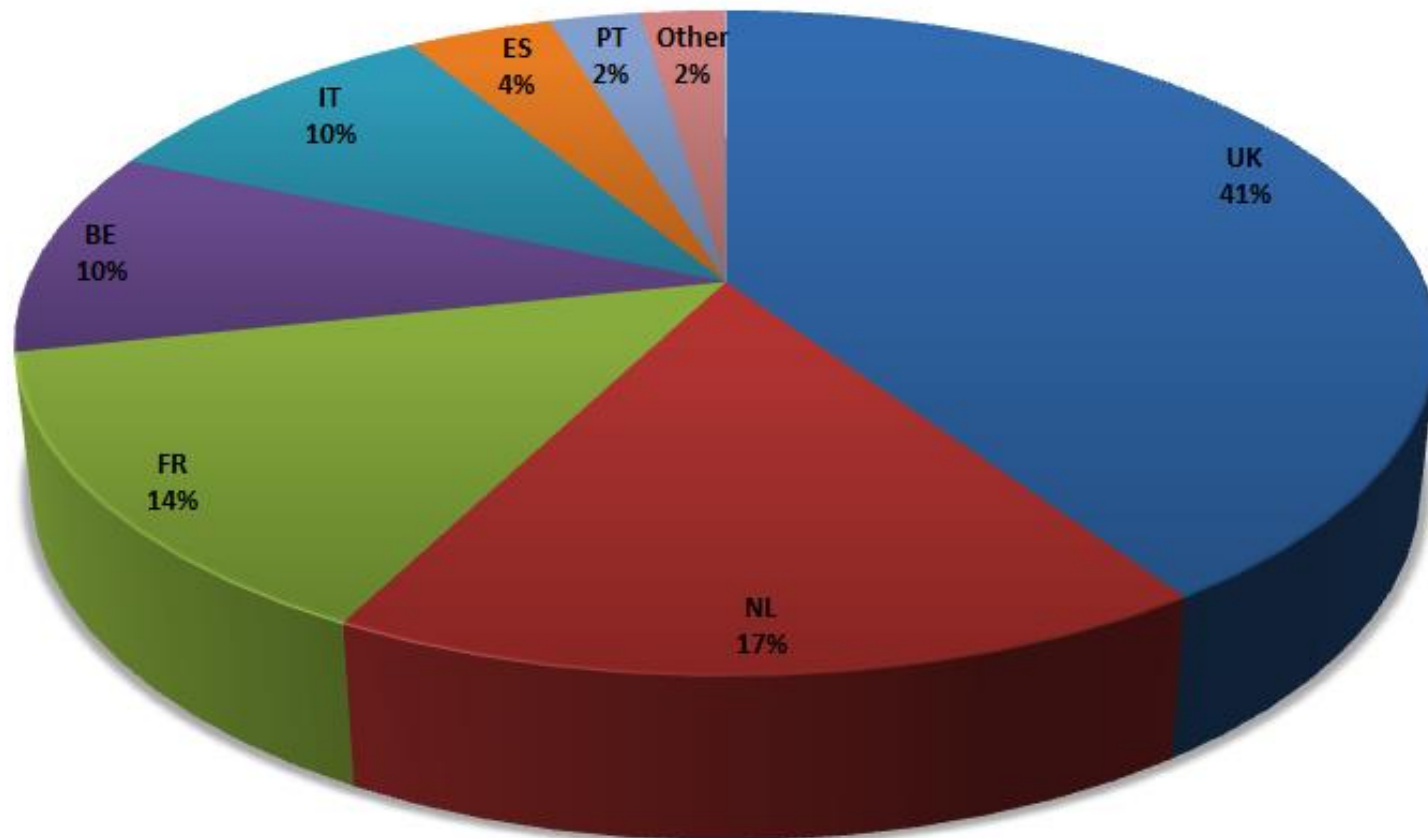


Husked Basmati Imports – Origin

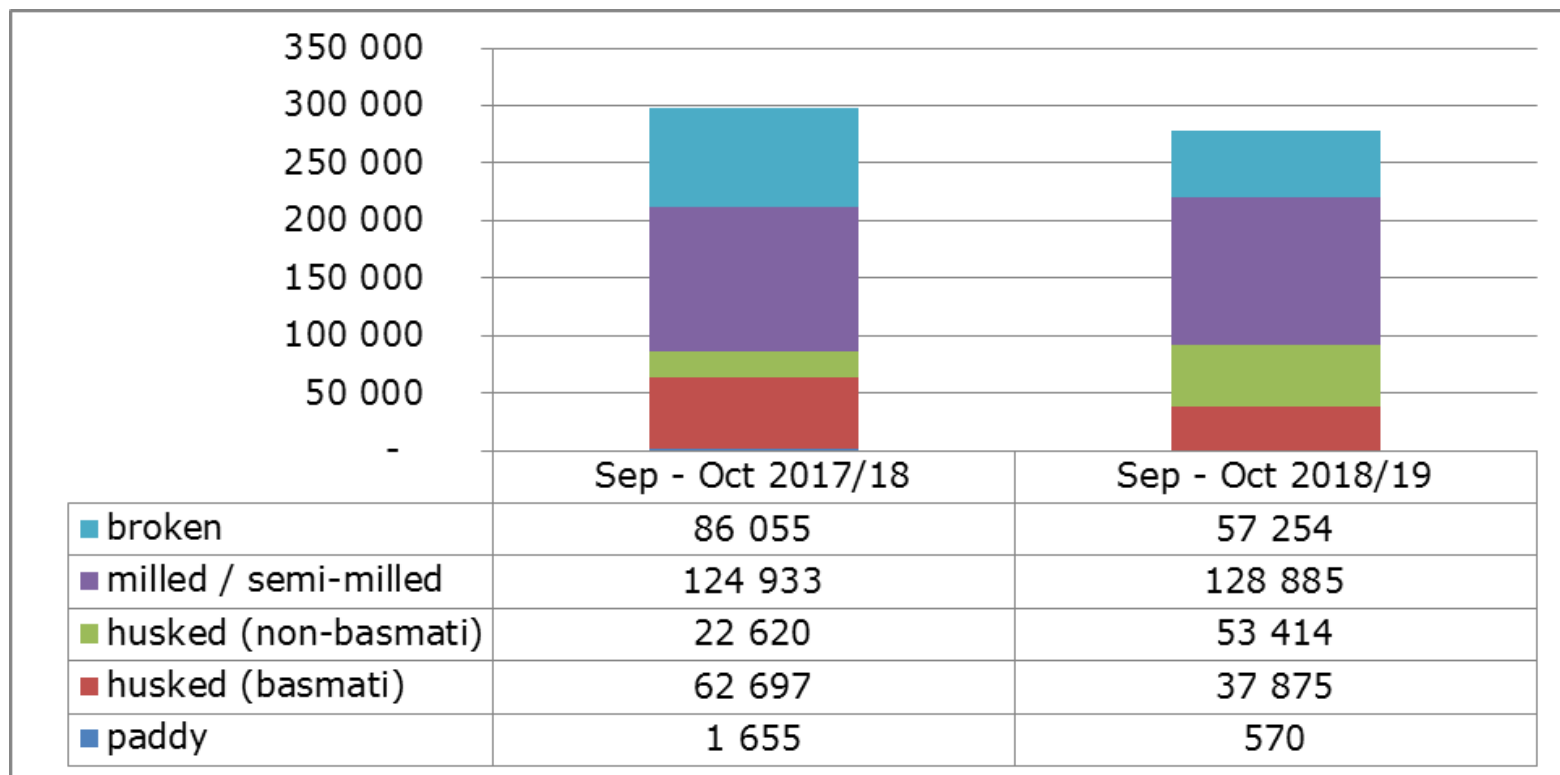
**Marketing year 2017/18 \approx 322 500 tonnes (milled eq.)
of which 55% from India and 45% from Pakistan**



Husked Basmati Imports – Destination Sep 2017 - Aug 2018 \approx 322 500 tonnes (milled eq.)

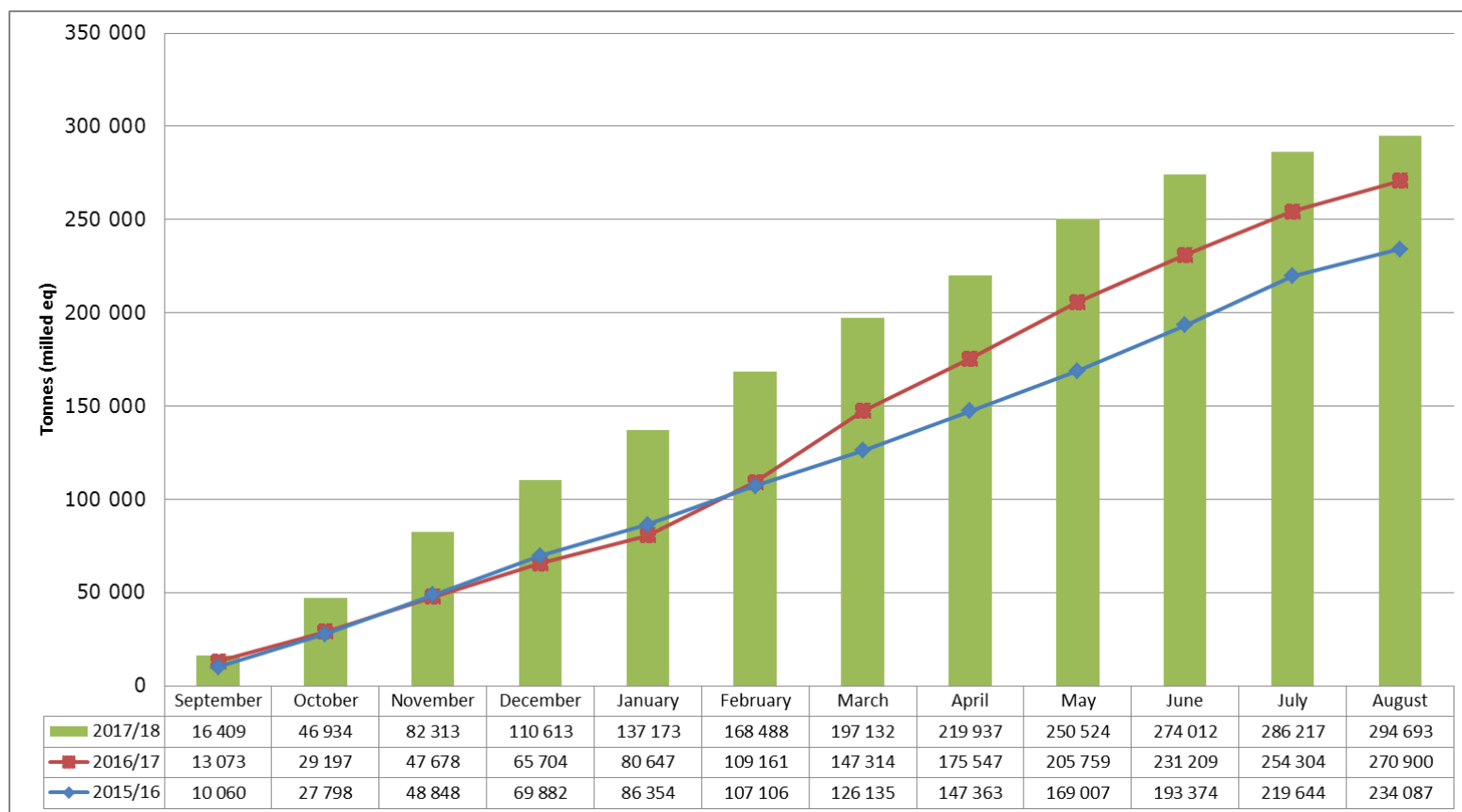


Total EU Rice Imports: Sep-Oct 2018/19 : +4% vs Sep-Oct 2017/18: $\approx 0,2$ Mio t (mill eq., excl broken)

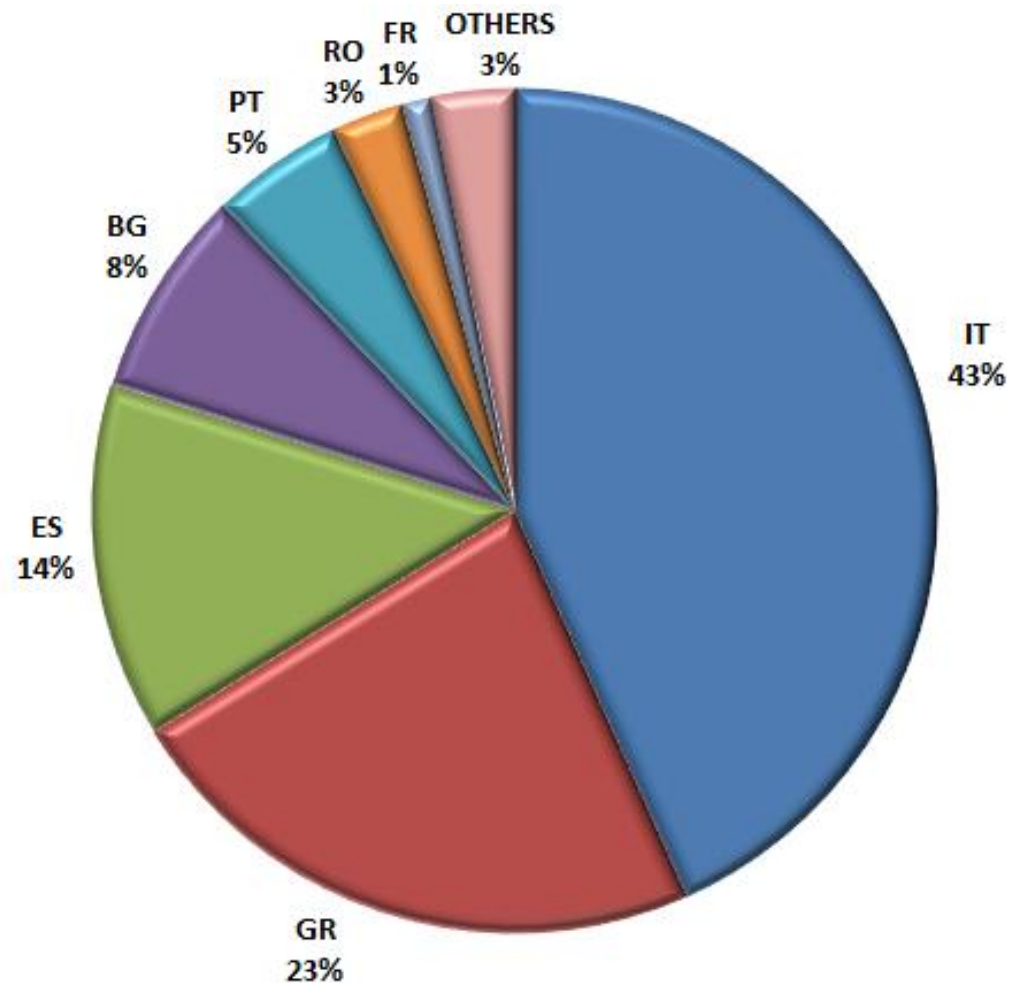


EU Rice Exports

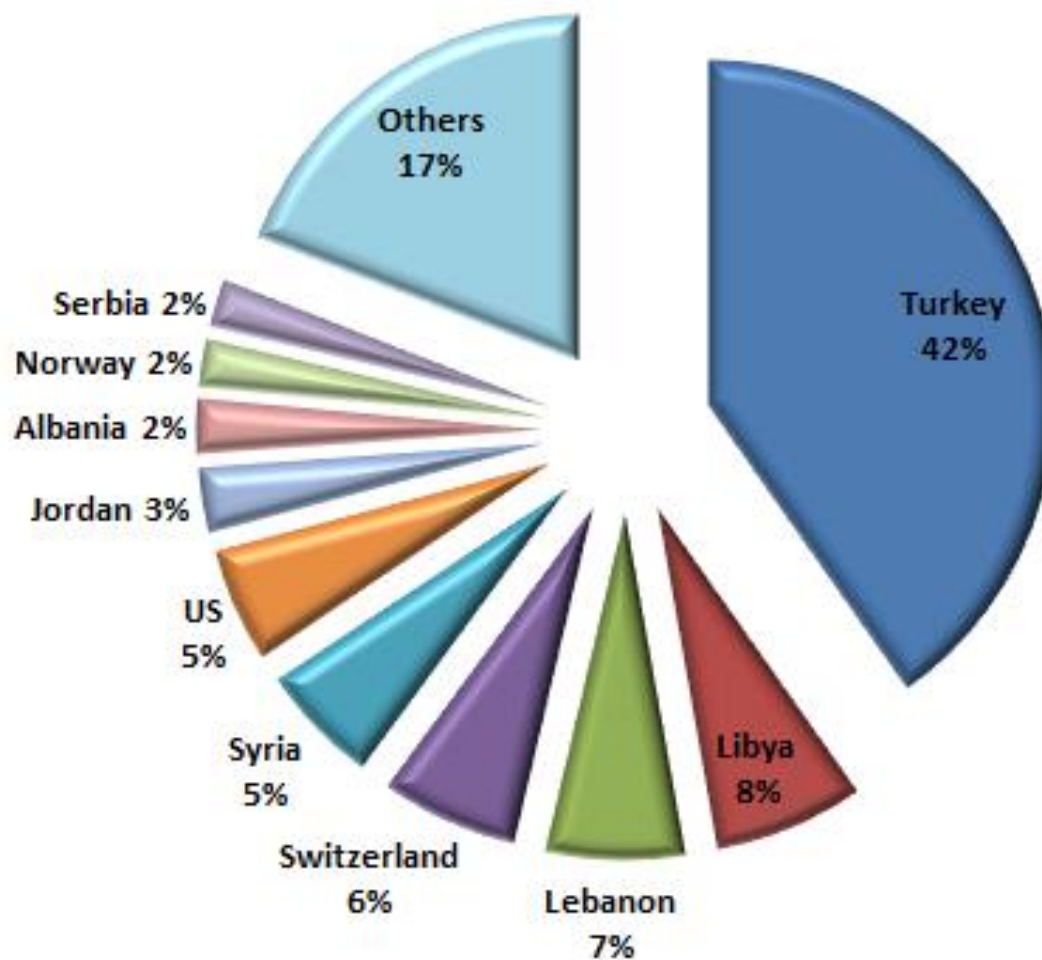
Total Rice Exports Sep - Aug 2017/18: + 9 % vs Sep - Aug 2016/17



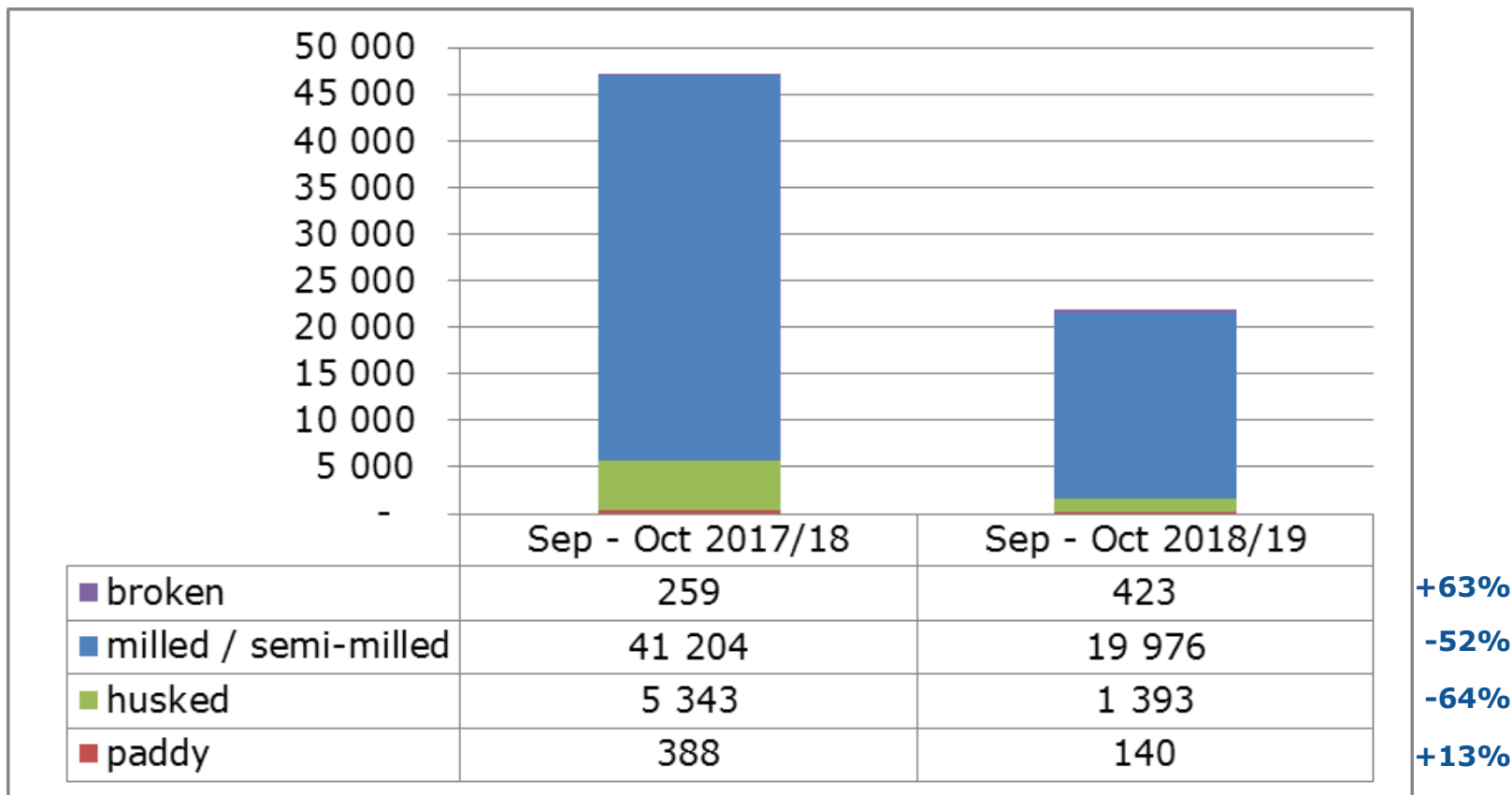
EU Rice Exports – Origin MY 2017/18 (Sep 2017 - Aug 2018)



EU Rice Exports – Destination MY 2017/18 (Sep 2017 – Aug 2018)



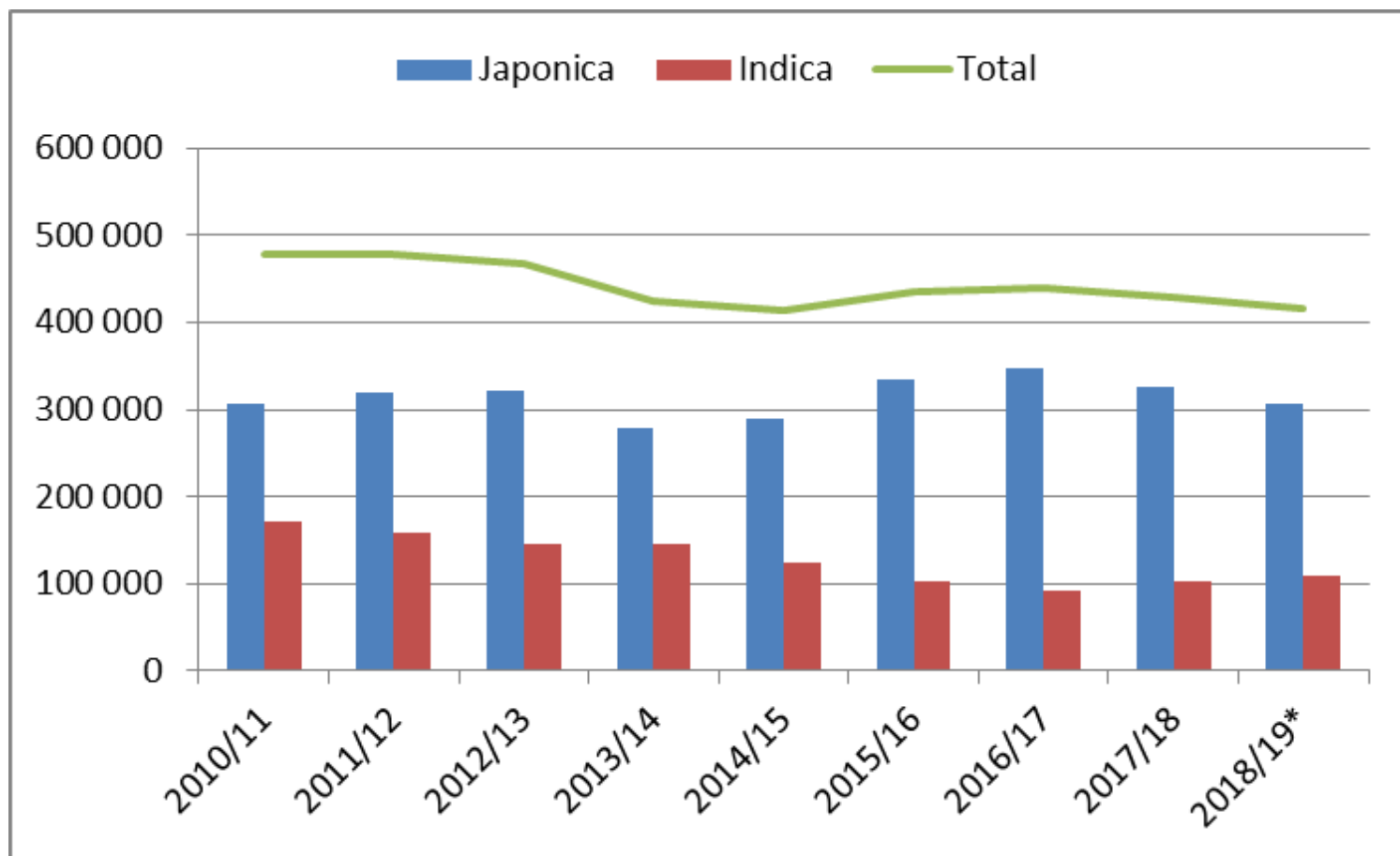
Total EU rice exports: **DOWN 54% in 2018/19** **Sep–Oct 2018/19: 21 509 t** (milled eq, excl. broken)



EU Rice balance sheet – November 2018

'000 metric tonnes (in milled equivalent)	2017/18 est			2018/19 fc		
	Japonica	Indica	TOTAL	Japonica	Indica	TOTAL
Beginning stocks						
Private	378	265	643	317	286	603
Intervention	-	-	-	-	-	-
Total beginning stocks	378	265	643	317	286	603
Usable production	1 274	459	1 733	1 195	485	1 679
Area ('000 ha)	326	103	429	307	109	416
Agronomic yield (t/ha, on paddy basis)	6.6	7.5	6.8	6.6	7.5	6.7
Milling yield (%)	1	1	1	59%	59%	60%
Imports (from third countries)	135	1 198	1 333	135	1 200	1 335
TOTAL SUPPLY	1 788	1 922	3 709	1 647	1 971	3 617
Domestic uses						
Human consumption / Industrial uses / Animal feed	1 168	1 595	2 763	1 048	1 647	2 695
Seed ***	39	10	48	36	10	47
Total domestic uses	1 206	1 605	2 811	1 084	1 658	2 742
Exports (to third countries)	264	30	295	262	28	290
TOTAL USE	1 470	1 636	3 106	1 346	1 686	3 032
Final stocks ****						
Private	317	286	603	300	285	585
Intervention	-	-	-	-	-	-
Total final stocks	317	286	603	300	285	585
Change in stocks	-61	21	-40	-17	-1	-18
Change in public stocks	-	-	-	-	-	-

EU Area forecast





Conclusions

- **EU rice production** (mainly japonica): **slightly down**
- **EU rice imports in 2017/18: up 7%**
- **EU rice exports in 2017/18: up 9%**
- **EU prices: in uptrend as production down**

The background of the slide is a photograph of a lush green rural landscape. In the foreground, there is a field of tall, vibrant green grass. In the middle ground, a line of dense green trees stretches across the horizon. The sky above is a deep, dramatic blue with some lighter clouds. The overall scene is peaceful and scenic.

Thank you for your attention