

EU COP forecasts 2010/11

***European Commission – Directorate
General for Agriculture and Rural
Development***

Advisory Group, Brussels, 24/09/2010



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Agriculture and
Rural Development

EU 27 Land use (mio ha)

Mio ha	2008	2009	2010 24-Aug	2010 16-Sep	% change 2010/2009
Cereals	60.2	58.5	56.8	56.3	-3.8
Oilseeds	10.2	10.8	11.1	11.0	1.7
Protein Crops	0.81	1.01	1.18	1.21	19.4
TOTAL GRAINS	71.2	70.4	69.1	68.6	-2.6



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CONTENT

- CEREALS figures



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24 Sept 2010



EU 27 cereal area Total 09/10 : 58.5 mio ha

Total 10/11 : 56.3 mio ha

Mio ha	2009	2010 24-Aug	2010 16-Sep	% change 2010/2009
TOTAL	58.5	56.8	56.3	-3.8
Soft wheat	22.9	22.9	23.0	0.5
Durum wheat	2.8	2.8	2.9	3.6
Barley	13.9	12.6	12.4	-11
Maize	8.4	8.3	8.1	-3.5
Rye	2.8	2.6	2.6	-8.2
Oats	2.9	2.7	2.7	-8



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EU 27 cereal production

Total 09/10 : 294.7 mio t

Total 10/11 : 280.7 mio t

(278 usable)

Mio t	2009	2010 24-Aug	2010 16-Sep	%change 2010/2009
TOTAL	294.7	279.0	280.7	-4.8
Soft wheat	129.8	126.8	127.6	-1.7
Durum wheat	8.7	8.5	8.3	-4.0
Barley	62.0	53.4	54.4	-12.4
Maize	57.8	55.3	58.2	0.6
Rye	9.9	8.3	8.0	-19.4
Oats	8.4	7.9	7.5	-11.0



EU 27 Cereals production: comparison with 5y average

EU - 27				difference vs 09/10	difference vs 5yrsav
				%	%
TOTAL CEREALS	Area	mio ha	56.3	-3.0	-3.8
	Yield	t/ha	5.0	-2.4	1.7
	Production	mio t	280.7	-5.3	-1.5
Soft wheat	Area	mio ha	23.0	0.5	1.9
	Yield	t/ha	5.5	-2.2	0.8
	Production	mio t	127.6	-1.7	2.2
Durum wheat	Area	mio ha	2.9	3.6	-7.3
	Yield	t/ha	2.9	-7.3	-4.3
	Production	mio t	8.3	-4.0	-10.3
Barley	Area	mio ha	12.4	-11.0	-10.9
	Yield	t/ha	4.4	-1.5	4.3
	Production	mio t	54.4	-12.4	-7.9
Maize	Area	mio ha	8.1	-3.5	-5.5
	Yield	t/ha	7.2	4.2	6.9
	Production	mio t	58.2	0.6	1.0



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EU 27 cereal production 2010

10/11 comparison vs 09/10 production
for main producing MS &
MS with significant differences

Most important producers	FR	DE	PL	UK	ES	IT	HU	RO
	-6.2%	-10.9%	-6.3%	-3.2%	11.0%	1.4%	-2.7%	16.6%
Others difference > 5%	DK	CZ	LT	SK	FI	PT	SE	IRL
	-12.2%	-9.5%	-13.6%	-16.6%	-28.0%	-18.8%	-8.5%	12.7%



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EU 27 cereal production 2010

Mio t	EC DG AGRI	JRC ISPRA	Stratégie Grain	TOEPFER
	16-Sep usable	20-Sep	16-Sep	23-Aug
Total Cereals	278.0	285.9	274.8	273.9
Soft Wheat	126.6	128.6	127.2	125.7
Barley	54.4	54.5	52.4	53.8
Maize	58.2	58.3	56	55.4



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EU 27 Balance sheet

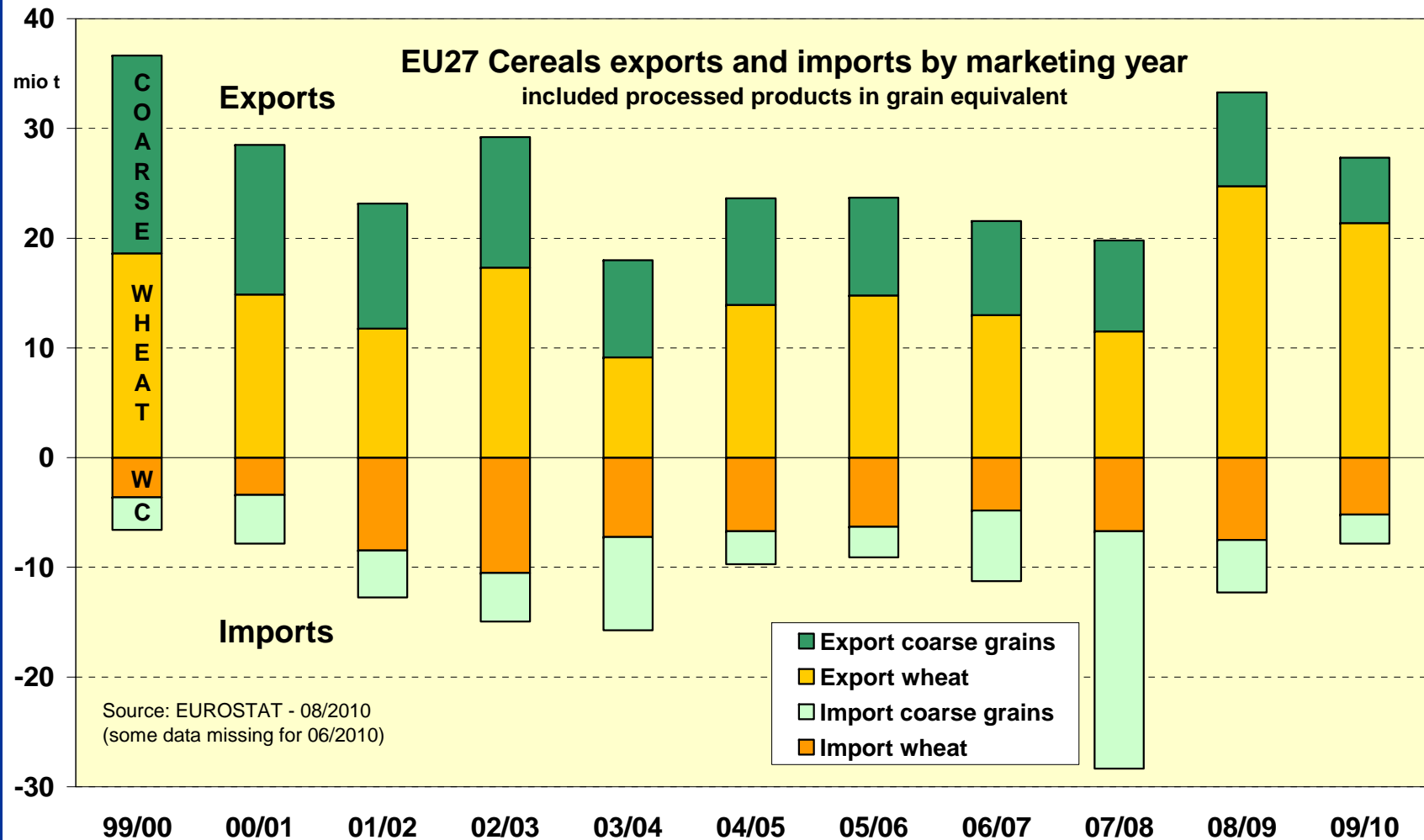
EU-27	Cereals balance sheet: Marketing year: 2009/2010									
<i>Jun-10</i>	Common wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others	(Mio t) EUR 27
Beginning stocks (01.07.2009)										
Market	22.2	13.2	1.2	17.1	0.8	0.6	1.5	1.0	0.5	58.2
Intervention	0.1	0.9	0.0	0.6	0.0	0.0	0.0	0.0	0.0	1.6
Total	22.3	14.1	1.2	17.7	0.8	0.6	1.5	1.0	0.5	59.8
Usable production	128.8	61.5	8.6	57.6	9.7	0.5	8.3	11.9	5.1	292.0
Import (1)	3.1	0.1	2.2	2.4	0.0	0.1	0.0	0.0	0.1	8.0
TOTAL AVAILABILITIES	154.2	75.7	12.0	77.7	10.5	1.2	9.9	12.9	5.7	359.8
USE										
- Human	47.0	0.4	8.5	4.8	3.0	0.2	1.1	0.1	0.0	64.9
- Seed	4.7	2.3	0.6	0.4	0.5	0.0	0.5	0.5	0.3	9.8
- Industrial	9.9	8.9	0.1	7.2	1.6	0.0	0.1	0.4	0.1	28.3
of which alcohol										9.4
o.w. bioethanol/biofuel	3.9	0.4		2.3	0.9			0.3		7.8
- Animal feed	56.0	42.3	0.6	47.5	3.9	0.6	6.4	10.4	4.6	172.3
TOTAL USE	117.6	53.8	9.7	59.8	9.0	0.8	8.1	11.4	5.1	275.3
Losses (excl on-farm)	0.9	0.4	0.1	0.6	0.1	0.0	0.1	0.1	0.0	2.2
Solde disponible	35.7	21.5	2.2	17.3	1.4	0.4	1.7	1.4	0.6	82.3
Export (1)	20.4	3.6	1.1	2.1	0.1	0.0	0.2	0.0	0.0	27.4
End stocks (30.06.2010)										
Market	15.1	12.5	1.1	15.0	1.3	0.4	1.5	1.4	0.6	48.9
Intervention buying-in	0.2	5.2		0.0						5.4
Intervention sales	0.0	0.7		0.4						1.0
of which most deprived	0.0	0.7		0.3						1.0
Intervention end stocks	0.3	5.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	6.0
Total	15.3	17.9	1.1	15.2	1.3	0.4	1.5	1.4	0.6	54.9
Change in stocks	-7.0	3.8	-0.1	-2.5	0.5	-0.2	0.0	0.4	0.2	-4.9
Change in public stocks	0.2	4.6	0.0	-0.4	0.0	0.0	0.0	0.0	0.0	4.4

(1) Grains equivalent (grain + groats and flour). Durum wheat: semolina included. Maize: processed products and animal feed included.

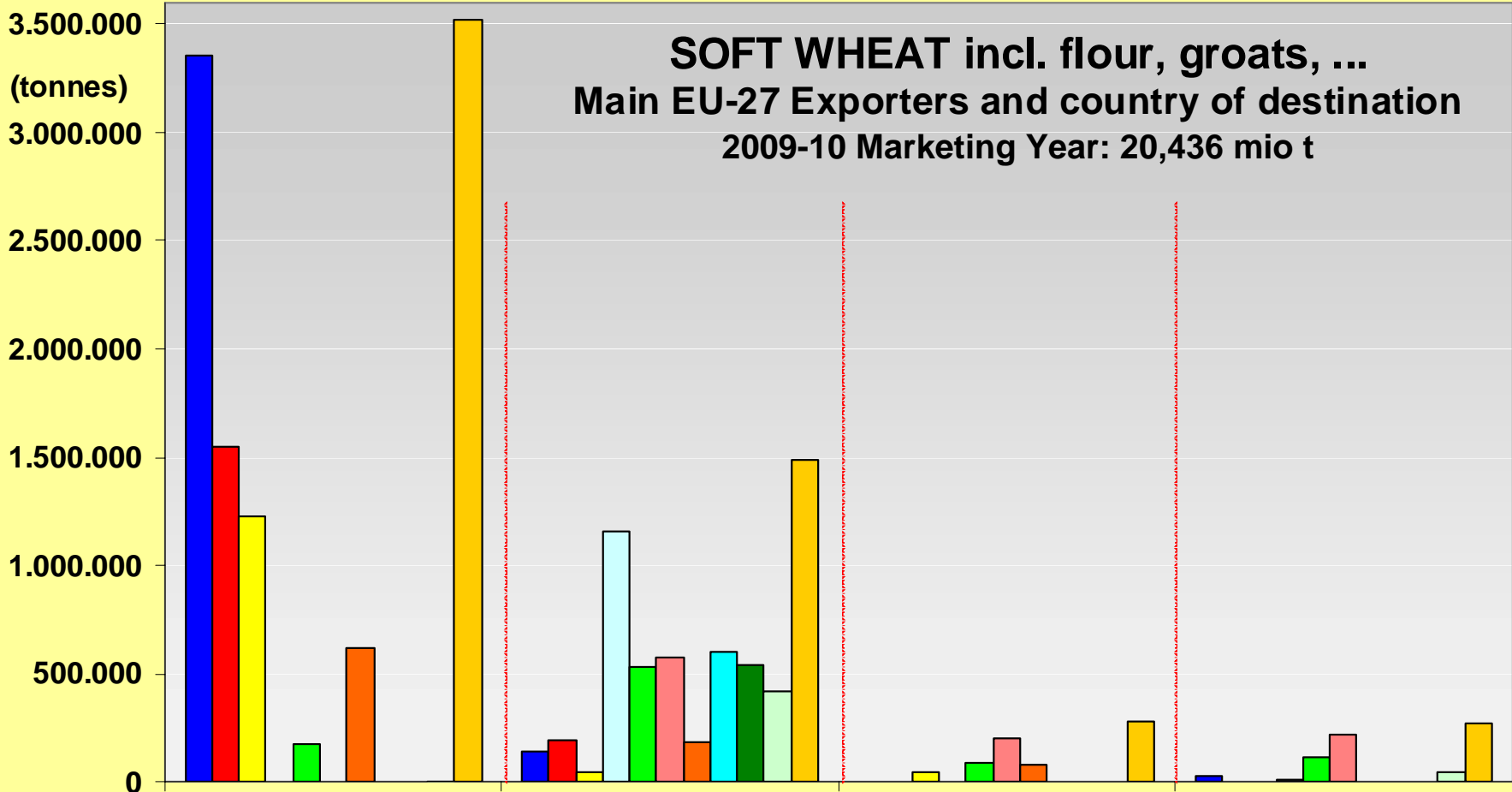


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EU 27 TRADE



2009/10 trade: EU wheat exporters and destinations



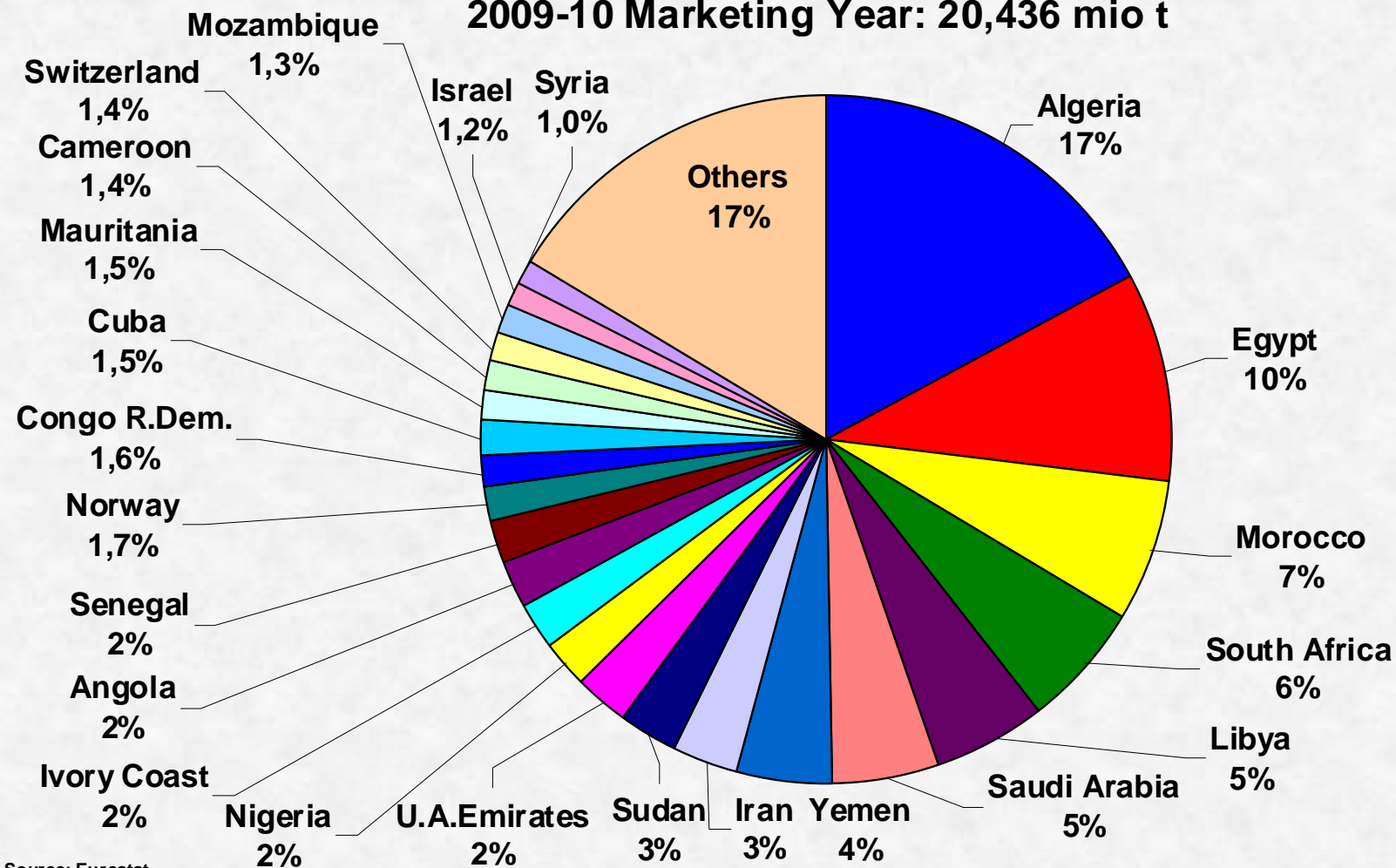
Source: Eurostat

- Algeria
- Egypt
- Morocco
- South Africa
- Libya
- Saudi Arabia
- Yemen
- Iran
- Sudan
- U.A.Emirates
- Others

2009/10 trade: EU wheat exports destinations

EU Soft Wheat incl flour, groats, ... export destinations

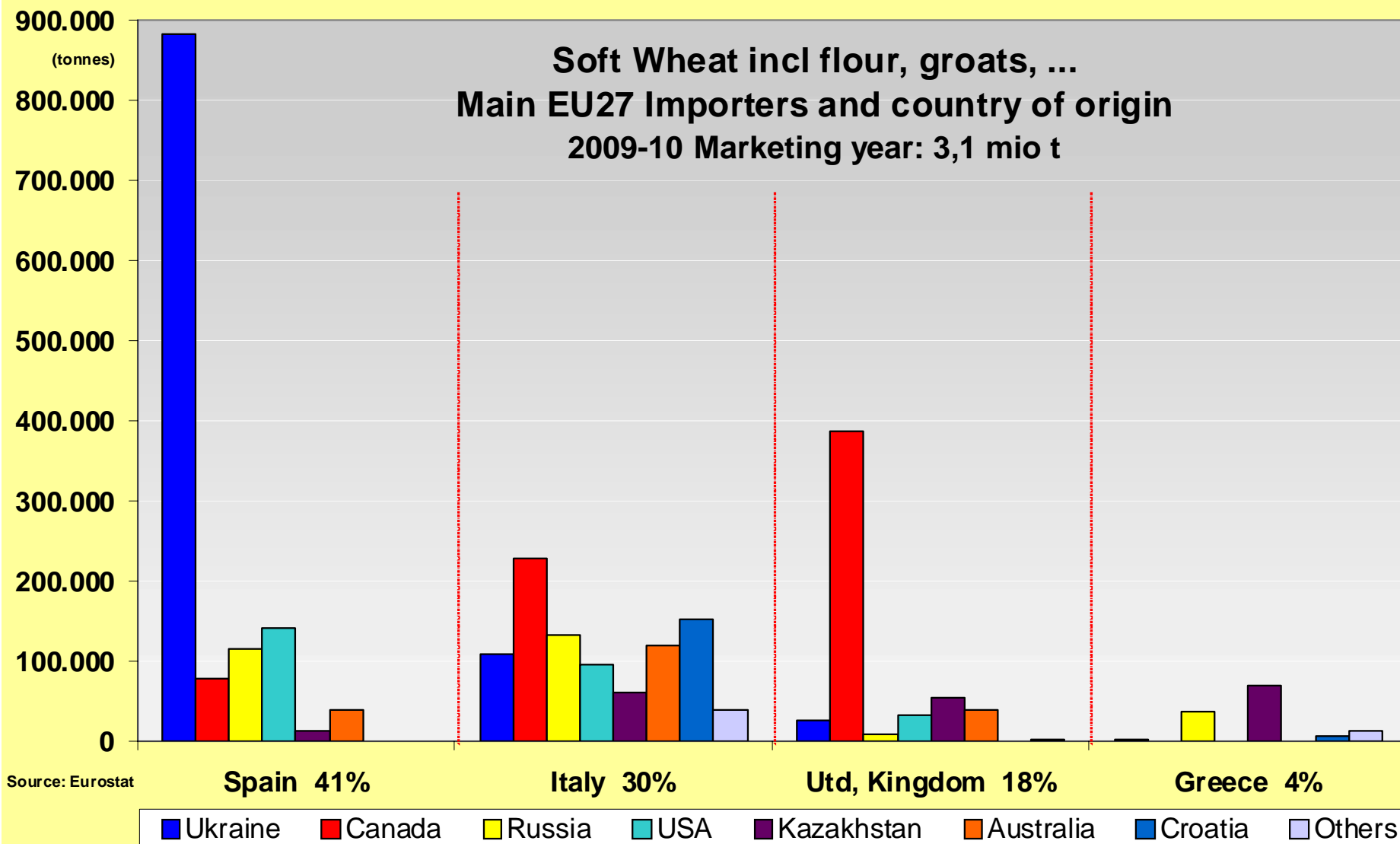
2009-10 Marketing Year: 20,436 mio t



Source: Eurostat

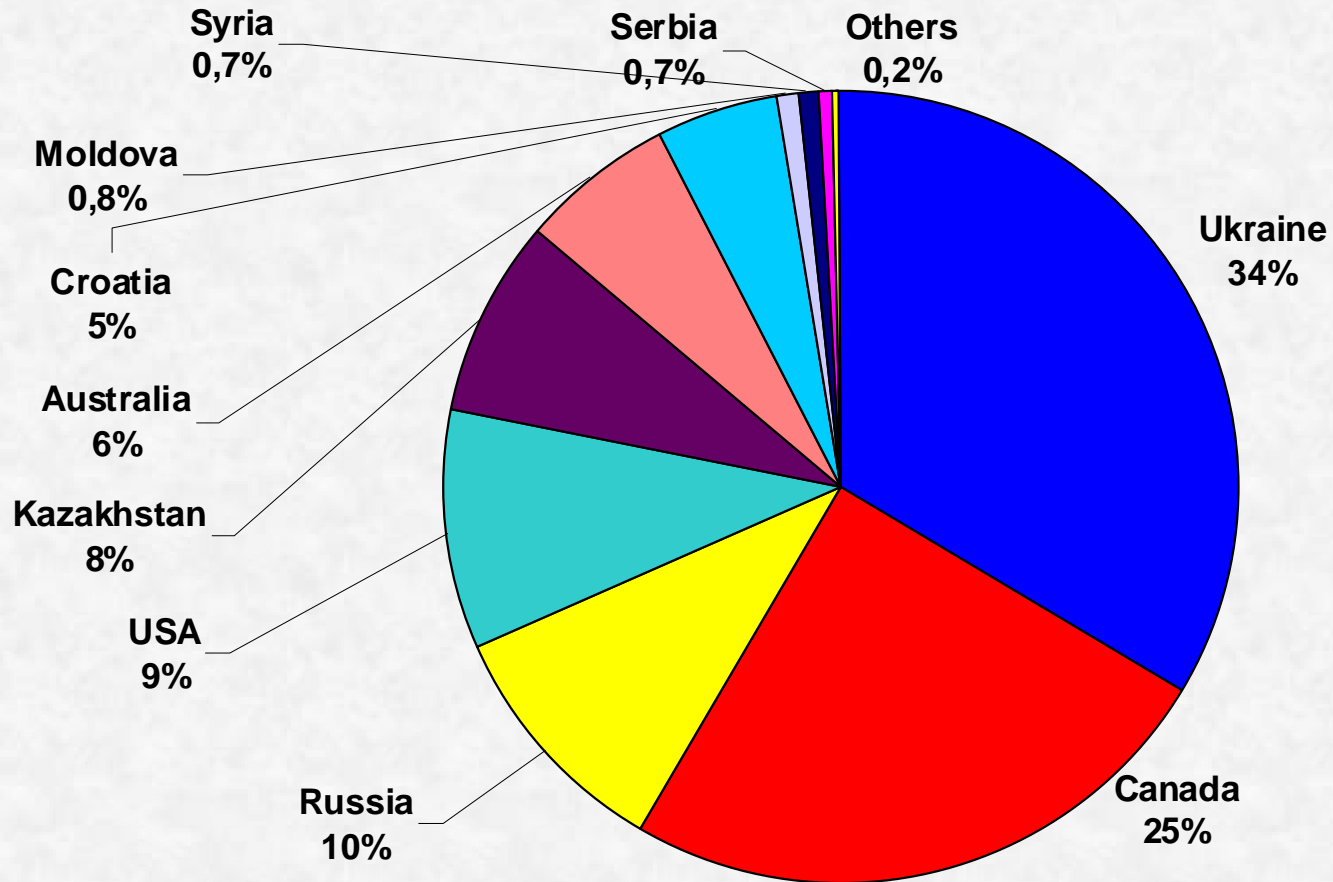
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2009/10 trade: EU wheat importers and origins



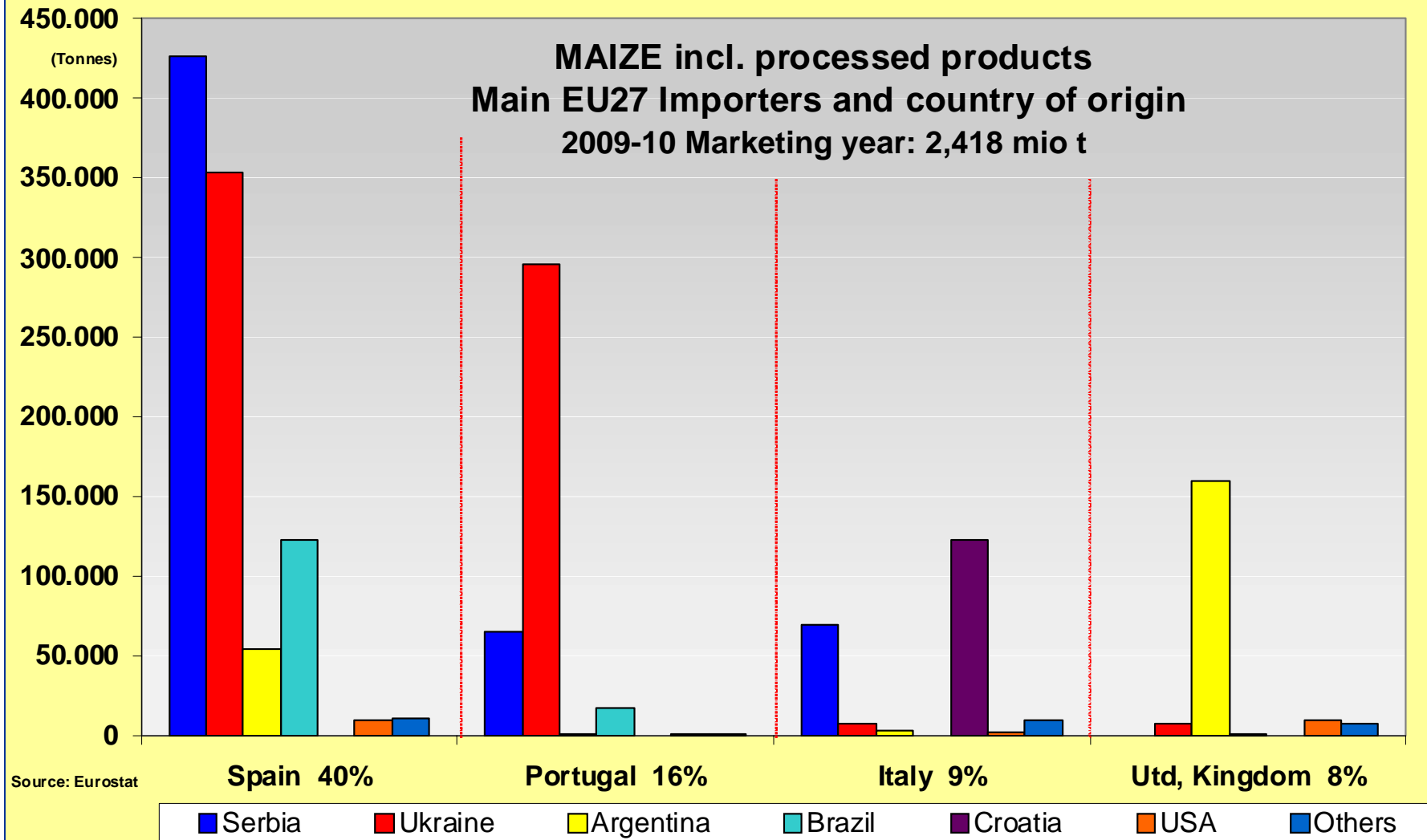
2009/10 trade: EU wheat imports origins

**SOFT WHEAT incl. flour, groats, ... EU27 imports origins
2009-10 Marketing year: 3,1 mio t**



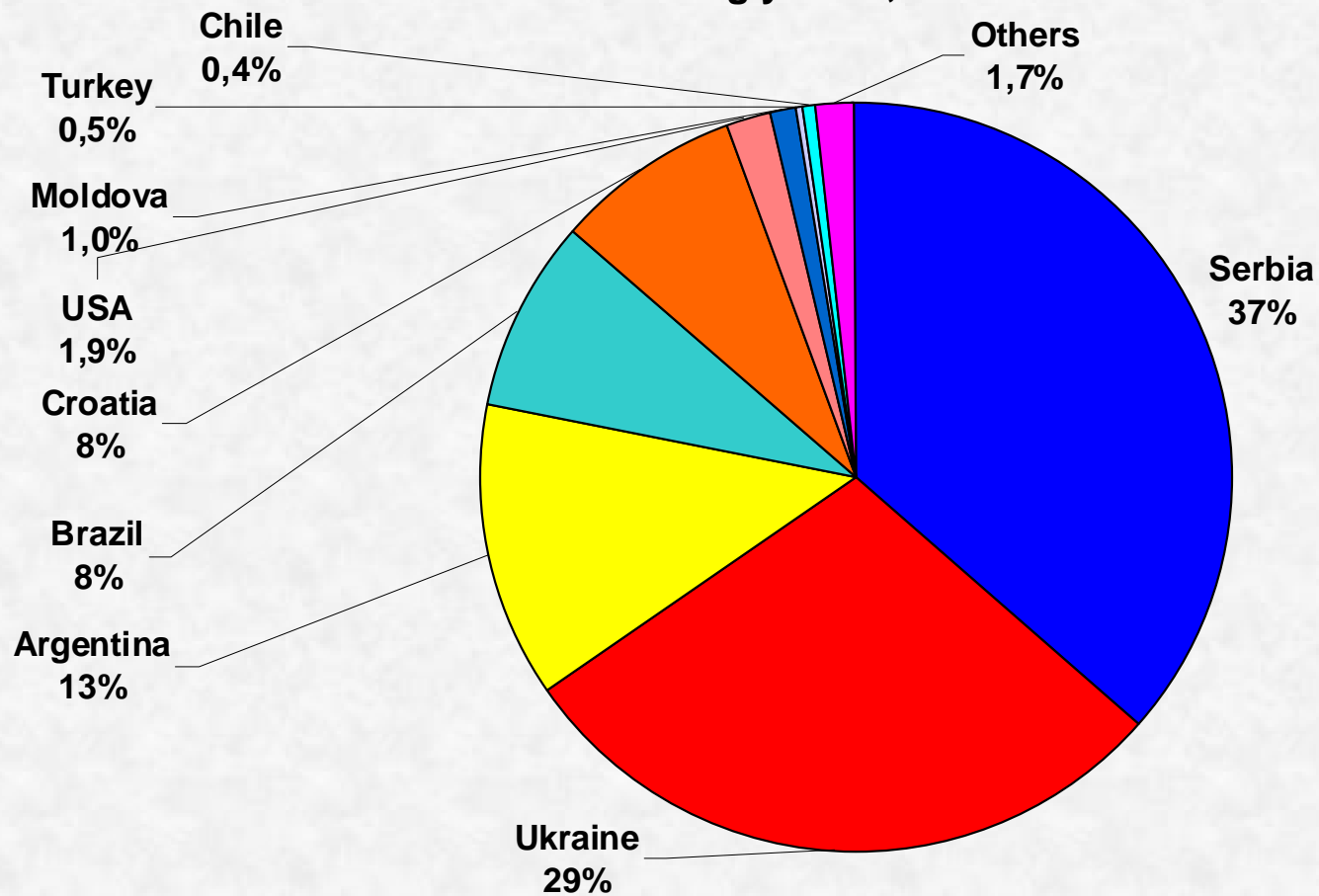
Source: Eurostat

2009/10 trade: EU maize importers and origins



2009/10 trade: EU maize imports origins

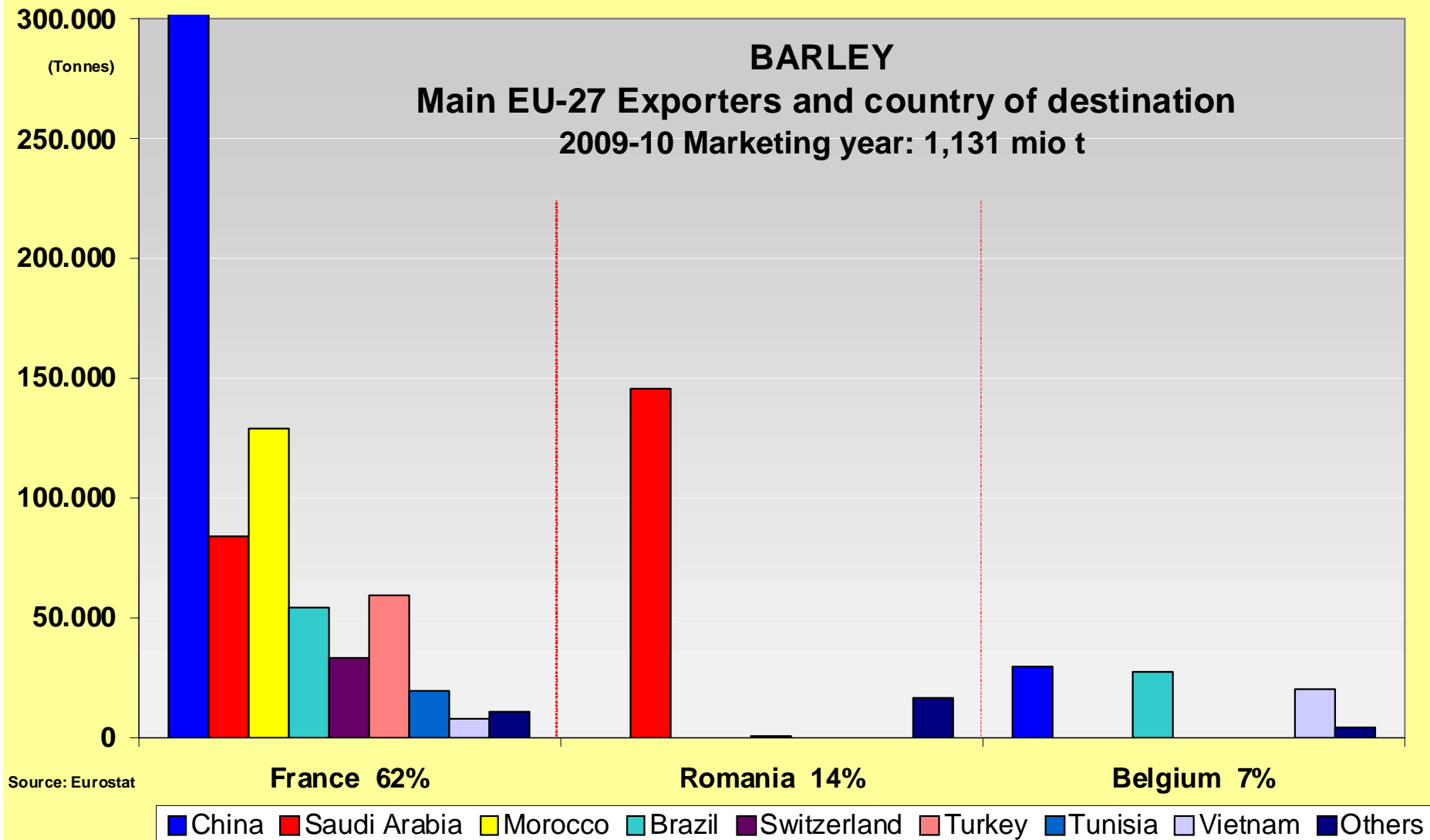
MAIZE incl. processed products - EU27 Imports origins
2009-10 Marketing year: 2,418 mio t



Source: Eurostat

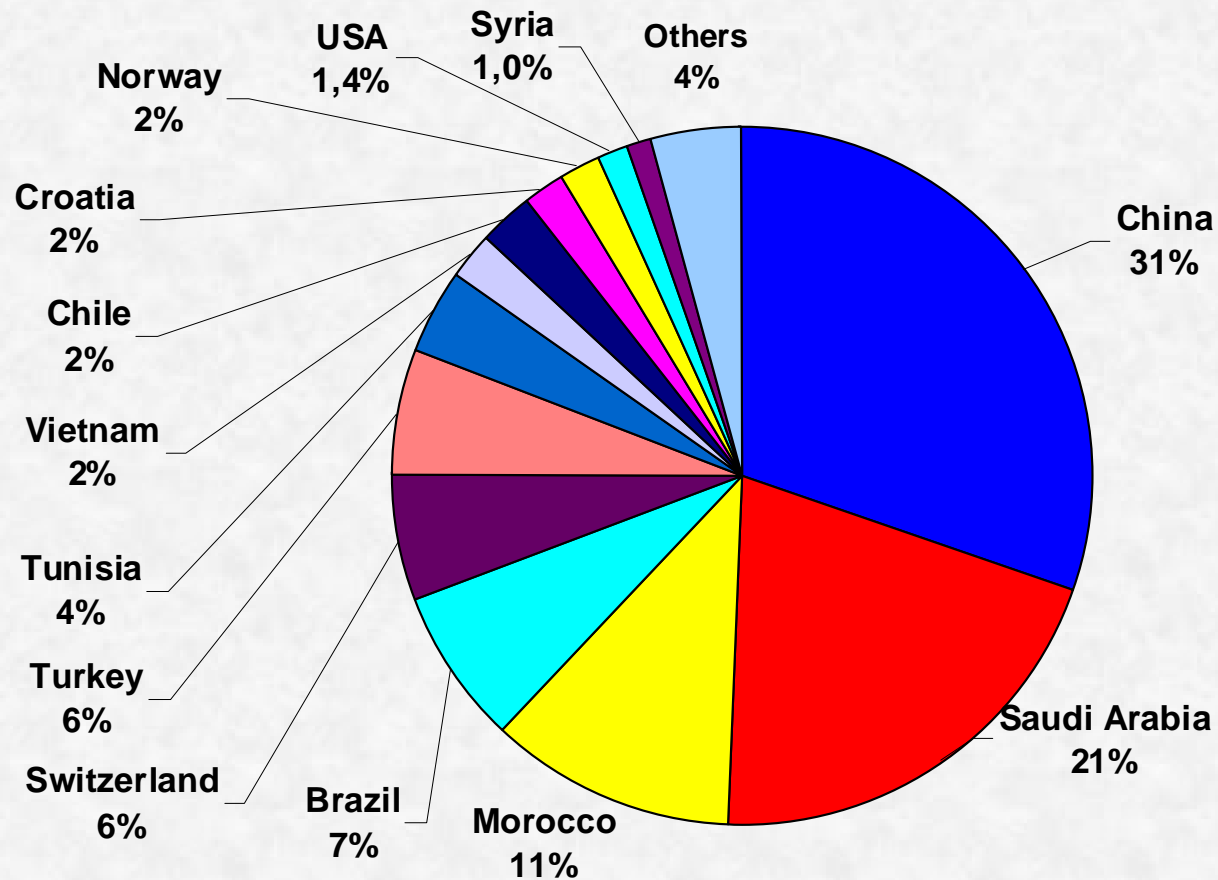
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2009/10 trade: EU barley exporters and destinations



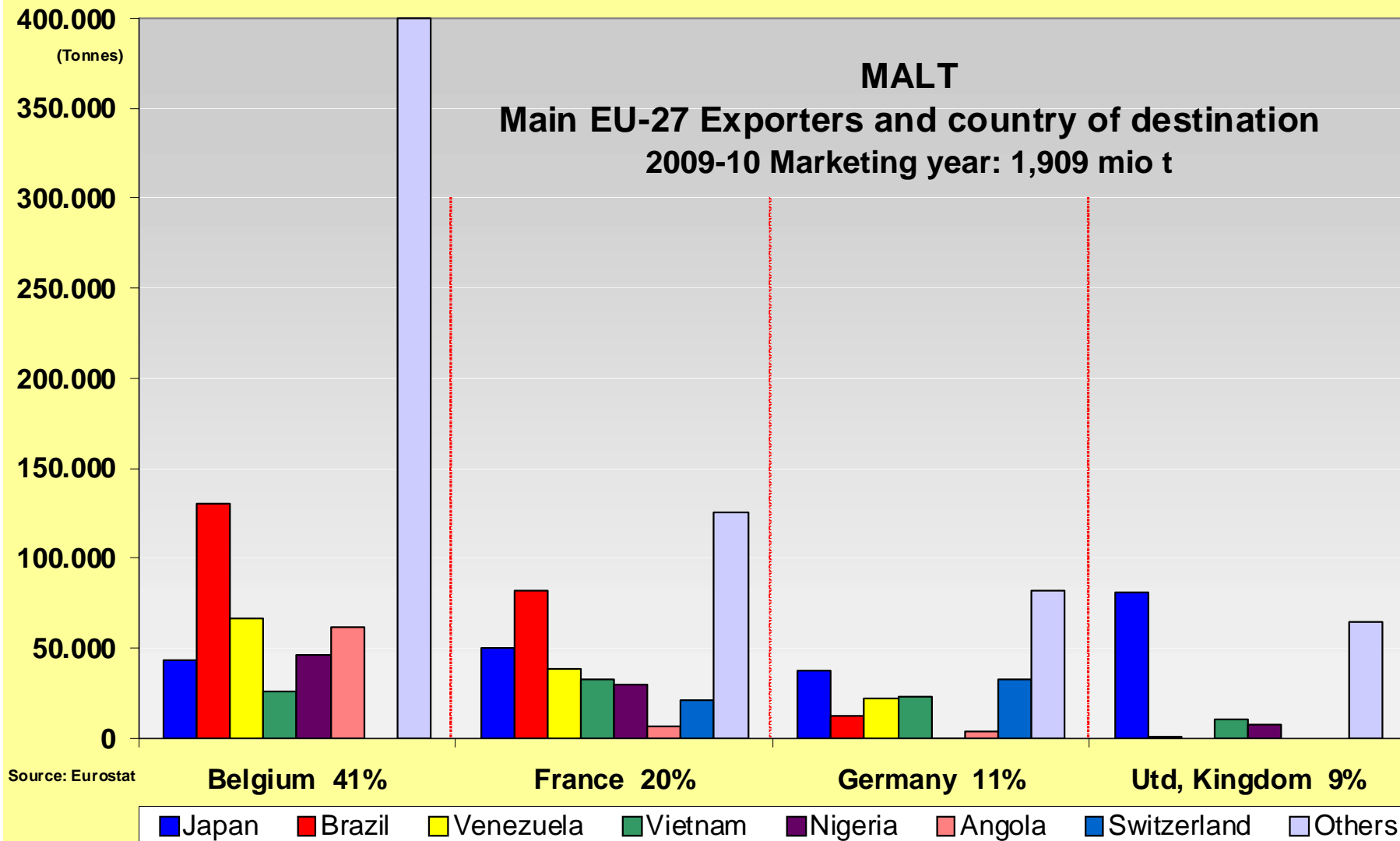
2009/10 trade: EU barley exports destinations

EU27 Barley export destinations
2009-10 Marketing year: 1,131 mio t



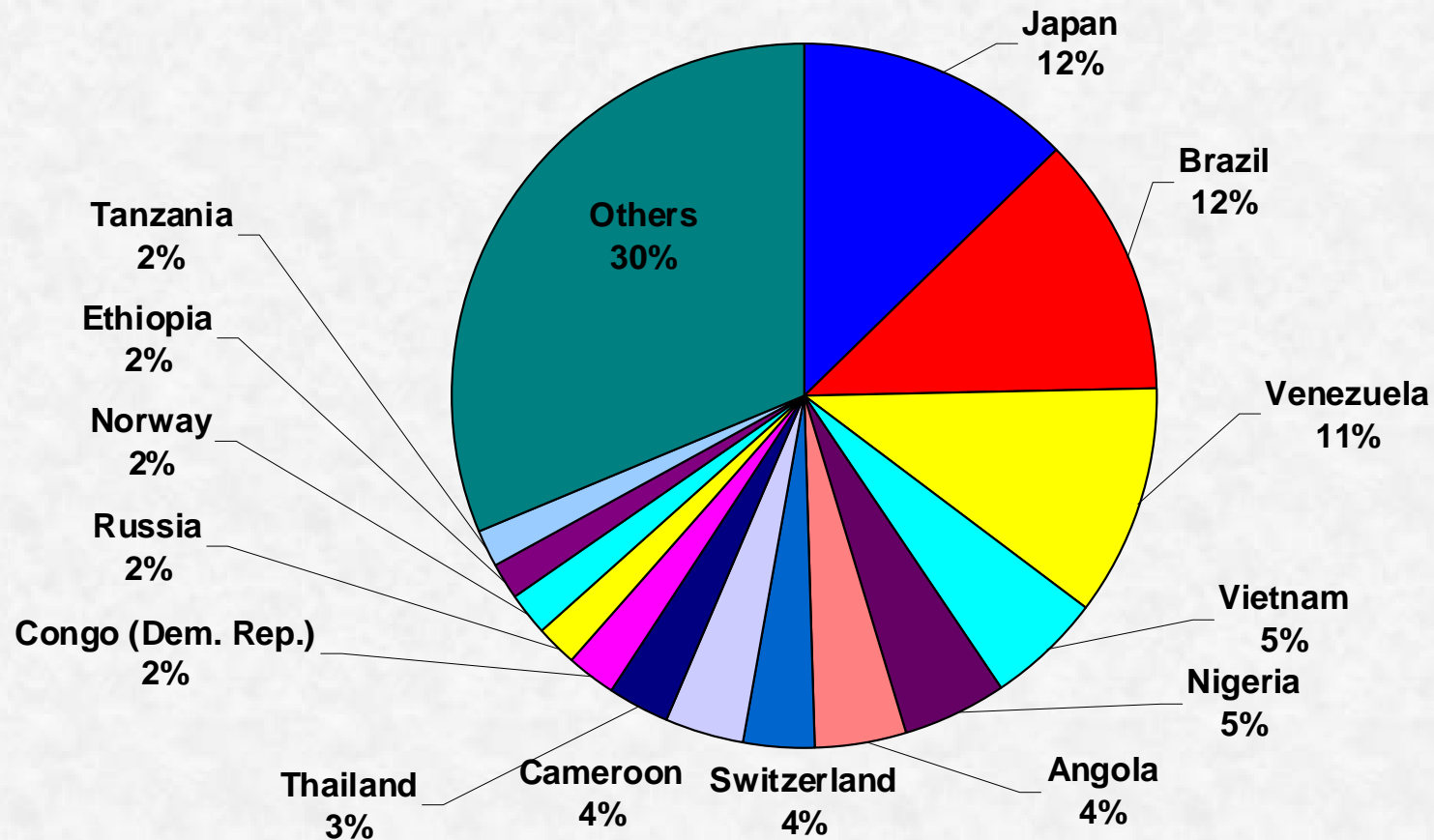
Source: Eurostat

2009/10 trade: EU malt exporters and destinations



2009/10 trade: EU malt exports destinations

EU27 Malt export destinations
2009-10 Marketing year: 1,909 mio t



EU Commitments 2010/2011 (12 weeks)

- **Imports: 2 mio t (2.3 mio t in 2009/10; 3.4 mio t 2-years ago)**
- 410 000 t soft wheat (963 000 t),
- 585 000 t durum wheat (750 000 t),
- 867 000 t maize (499 000 t),
- 66 000 t sorghum (1 000 t)
- 15 000 t barley (48 000 t)

- **Exports: 7.2 mio t (5.2 mio t last year; 6.8 mio t 2 years ago)**
- 5.6 mio t soft wheat flour inclusive (4.7 mio t),
- 1.3 mio t barley (281 000 t)
- 136 000 t durum wheat (44 000 t)
- 131 000 t maize (123 000 t)

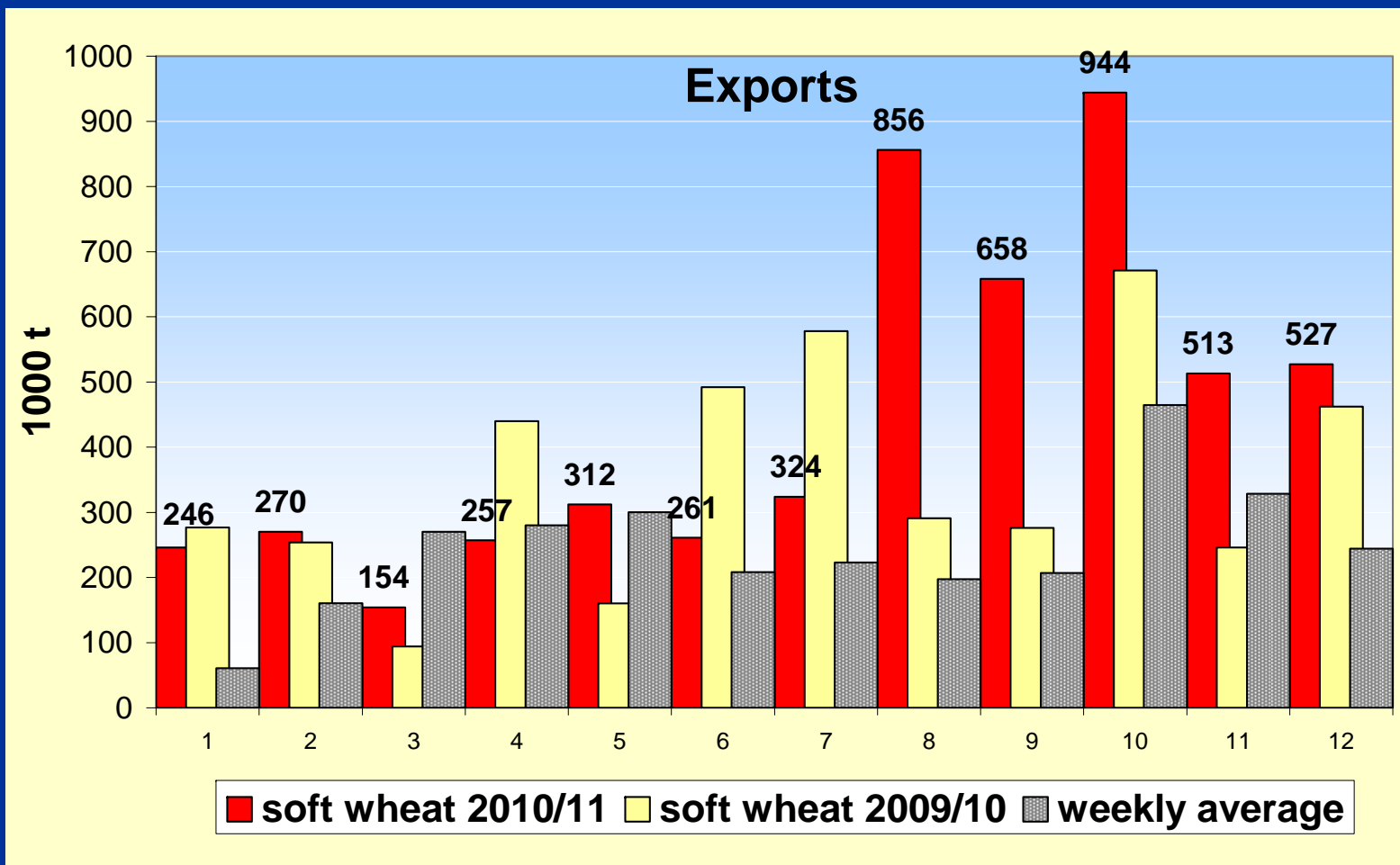
- **Net exporter: 5.3 mio t (2.9 one year ago)**



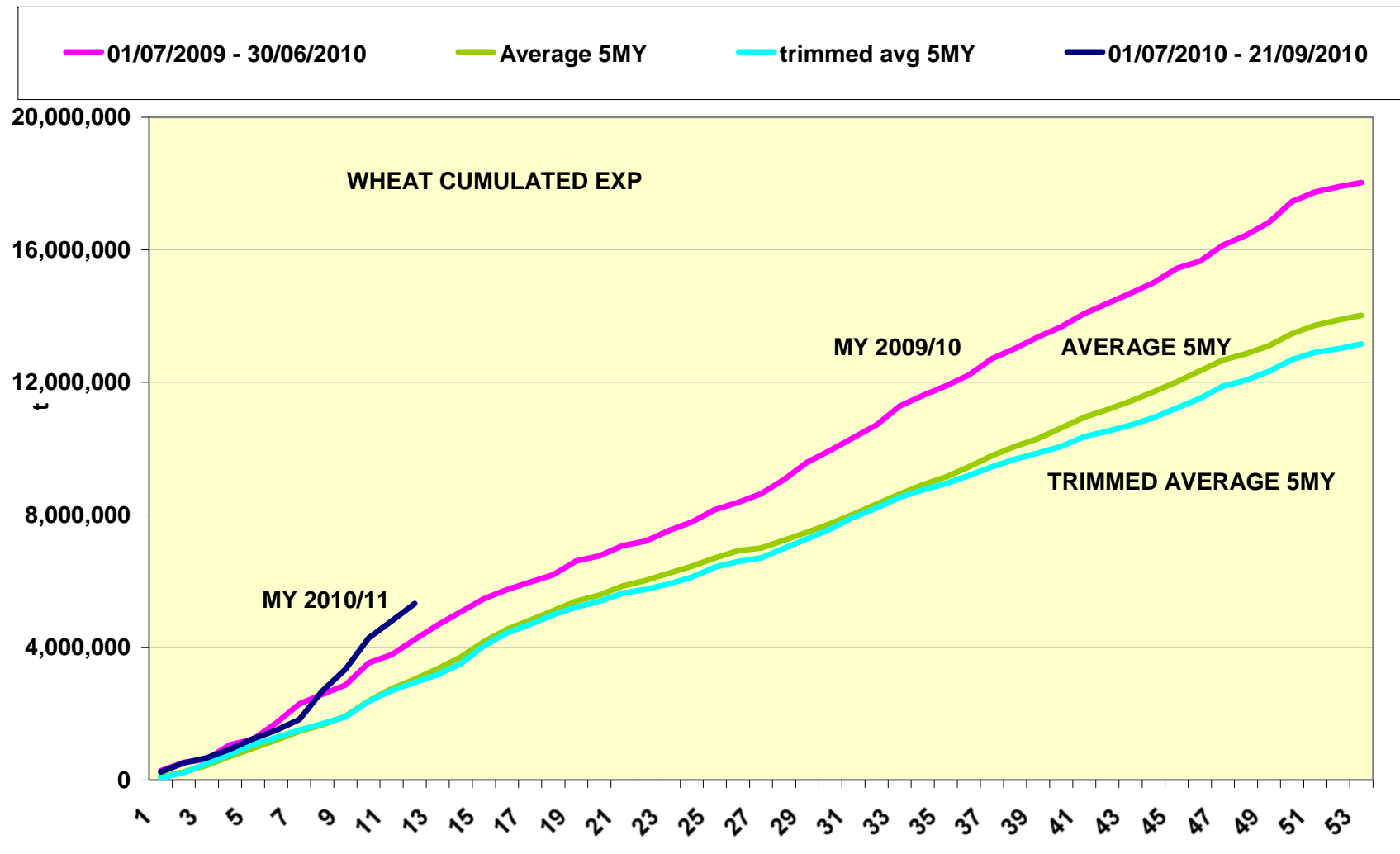
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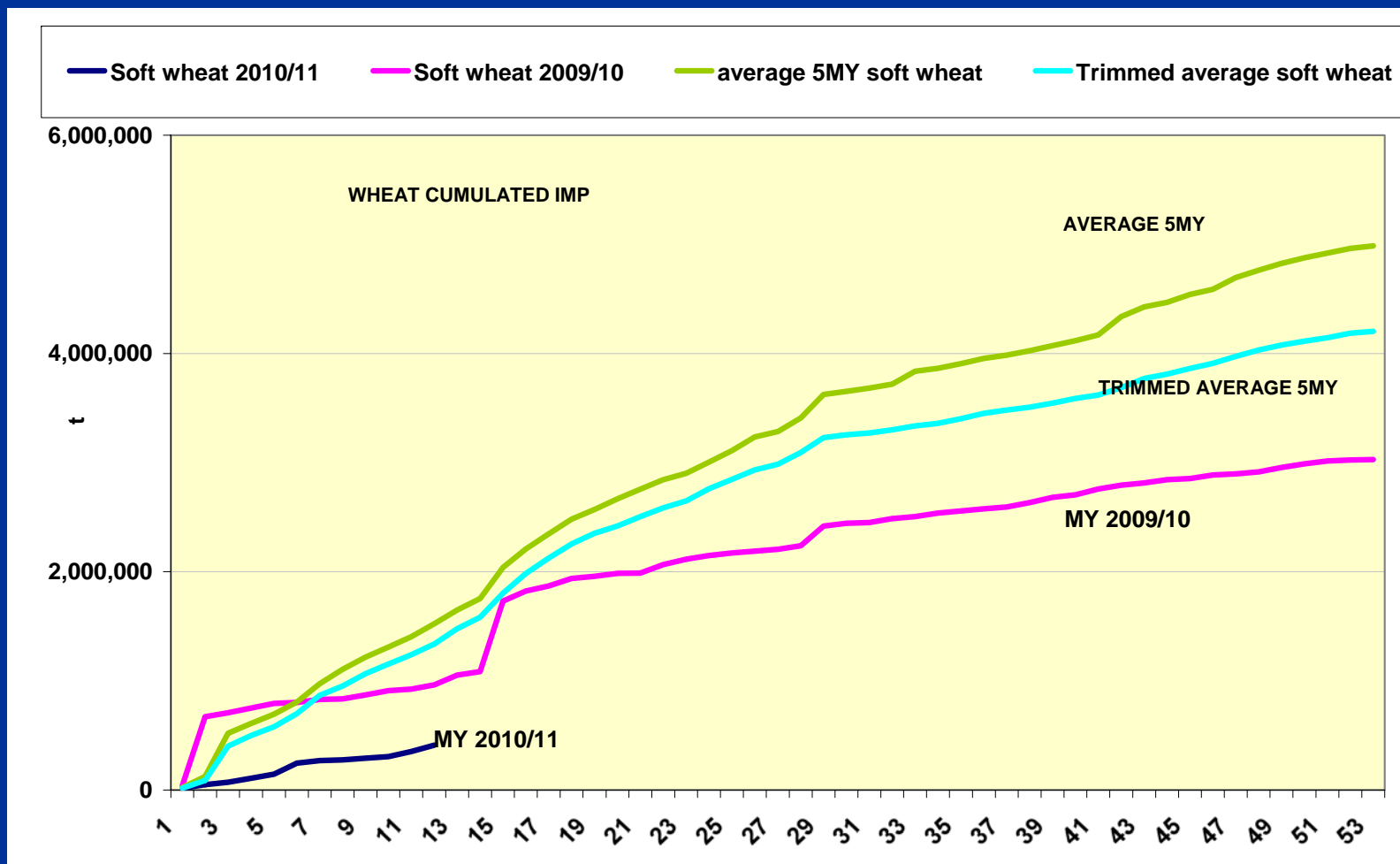
EU wheat exports in recent weeks



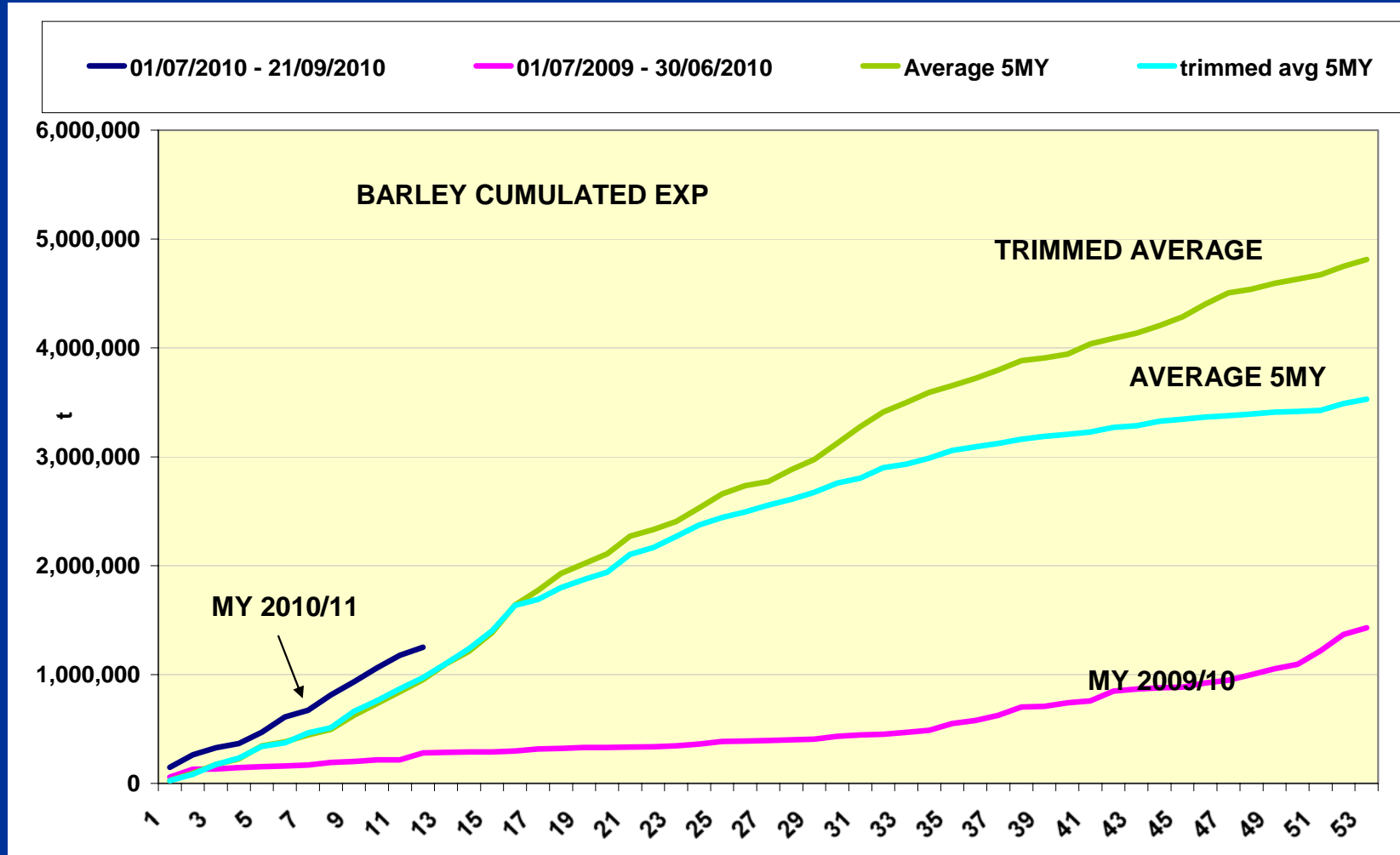
EU Wheat cumulated export commitments



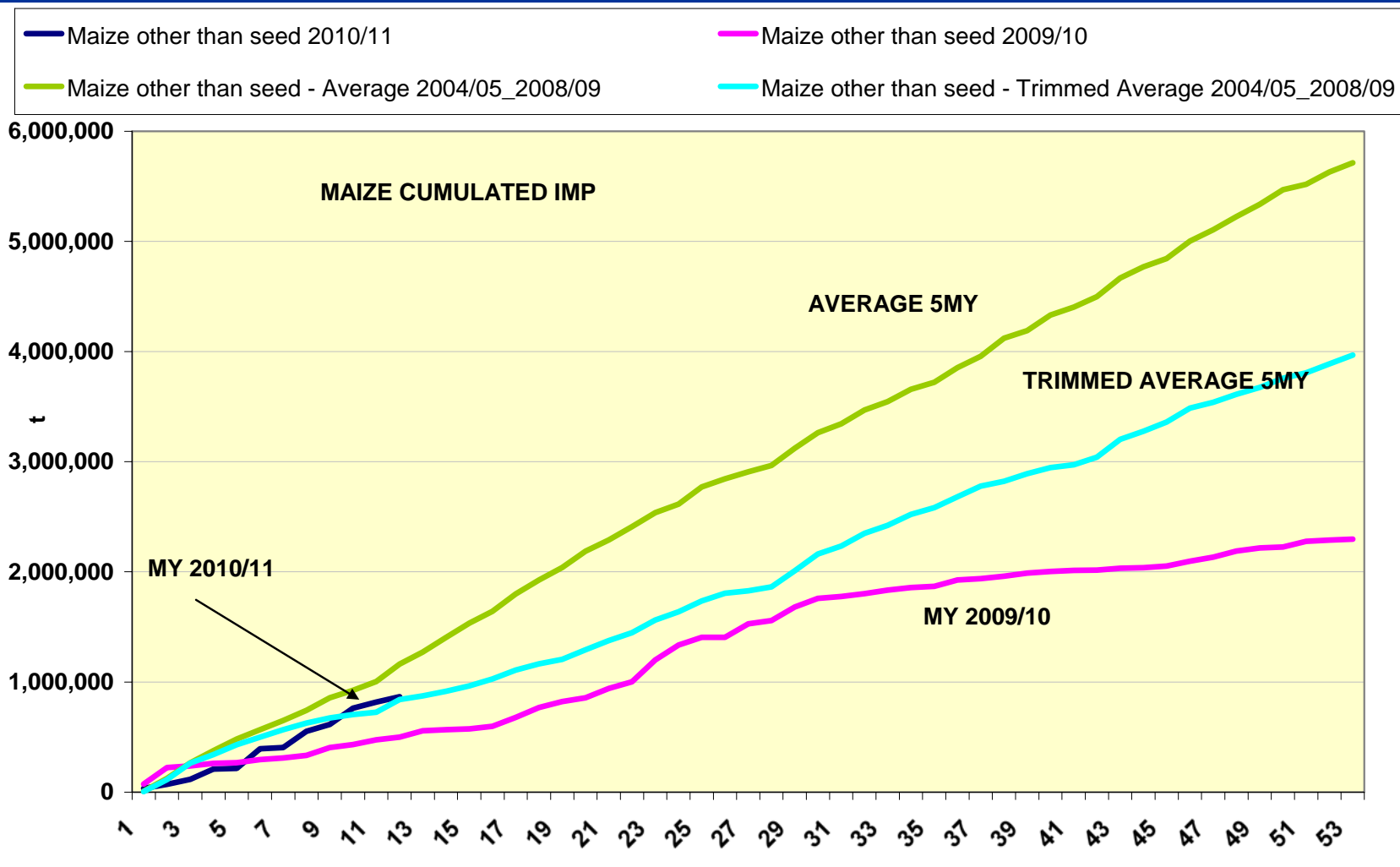
EU Wheat cumulated import commitments



EU Barley cumulated export commitments



EU Maize cumulated import commitments



EU 27 Balance sheet

EU-27 <i>Sep-10</i>	Cereals balance sheet:Marketing year: 2010/2011									(Mio t)
	Common wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others	EUR 27
Beginning stocks (01.07.2010)										
Market	15.1	12.5	1.1	15.0	1.3	0.4	1.5	1.4	0.6	48.9
Intervention	0.3	5.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	6.0
Total	15.3	17.9	1.1	15.2	1.3	0.4	1.5	1.4	0.6	54.9
Usable production	126.6	53.9	8.2	58.0	7.8	0.4	7.4	10.4	5.4	278.0
Import (1)	3.5	0.2	2.0	3.0	0.0	0.3	0.0	0.0	0.2	9.2
TOTAL AVAILABILITIES	145.4	72.0	11.4	76.2	9.1	1.1	8.9	11.9	6.2	342.1
USE										
- Human	47.1	0.4	8.5	4.8	3.0	0.2	1.1	0.1	0.0	65.1
- Seed	4.7	2.3	0.6	0.4	0.5	0.0	0.5	0.5	0.3	9.8
- Industrial	10.1	9.2	0.1	7.9	1.6	0.0	0.1	0.5	0.1	29.6
of which alcohol o.w. bioethanol/biofuel	4.1	0.7		3.0	0.9			0.4		10.7
- Animal feed	53.8	42.7	0.3	48.9	3.3	0.6	6.2	9.6	4.6	170.0
TOTAL USE	115.8	54.5	9.5	61.9	8.4	0.8	7.9	10.7	5.1	274.5
Losses (excl on-farm)	0.9	0.4	0.1	0.6	0.1	0.0	0.1	0.1	0.0	2.2
Solde disponible	28.7	17.2	1.8	13.6	0.6	0.3	0.9	1.1	1.1	65.4



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Week 10 of MY 2010/11 EU 27: 5 630 268 t

In tonnes 19/09/2010	Common wheat	Barley	Maize	Sorghum	Rye	Total
Beginning stocks	273.319	5.493.109	214.630	0	0	5.981.058
Quantities accepted	0	0	0	0	0	0
Quantities sold	38.625	102.004	210.759	0	0	351.388
Gross/balance	234.694	5.391.105	3.871	0	0	5.629.670
Quantities under offer	125	473	0	0	-	598
Of which quantities offered this week	0	0	0	0	-	0
Total: Gross balance + quant. under offer	234.819	5.391.578	3.871	0	0	5.630.268
Committed for free distribution	16	69.673	478			70.167
Difference	234.803	5.321.905	3.393	0		5.560.101



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CONTENT

- CEREALS figures
- OILSEEDS&PROTEIN CROPS figures

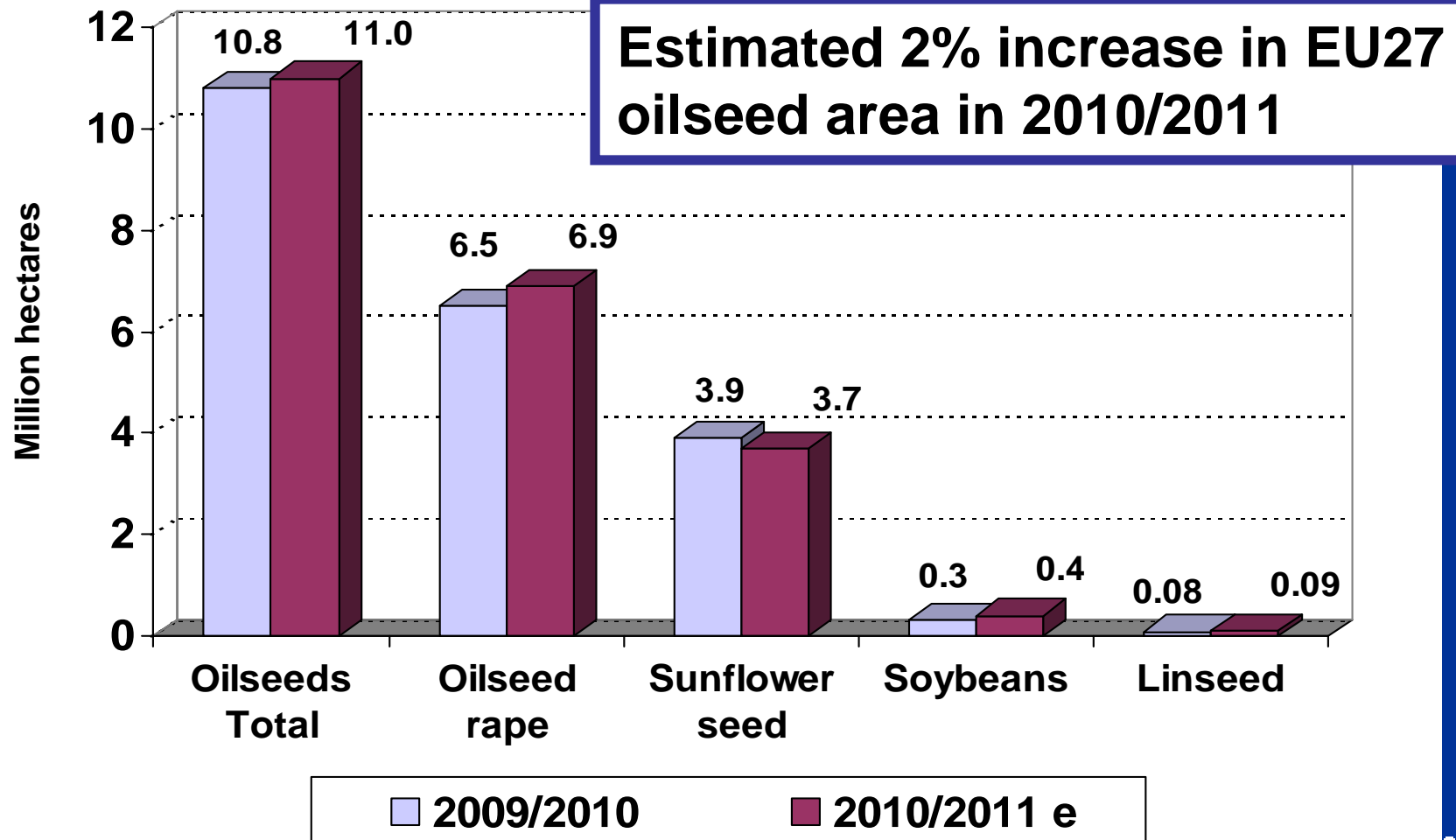


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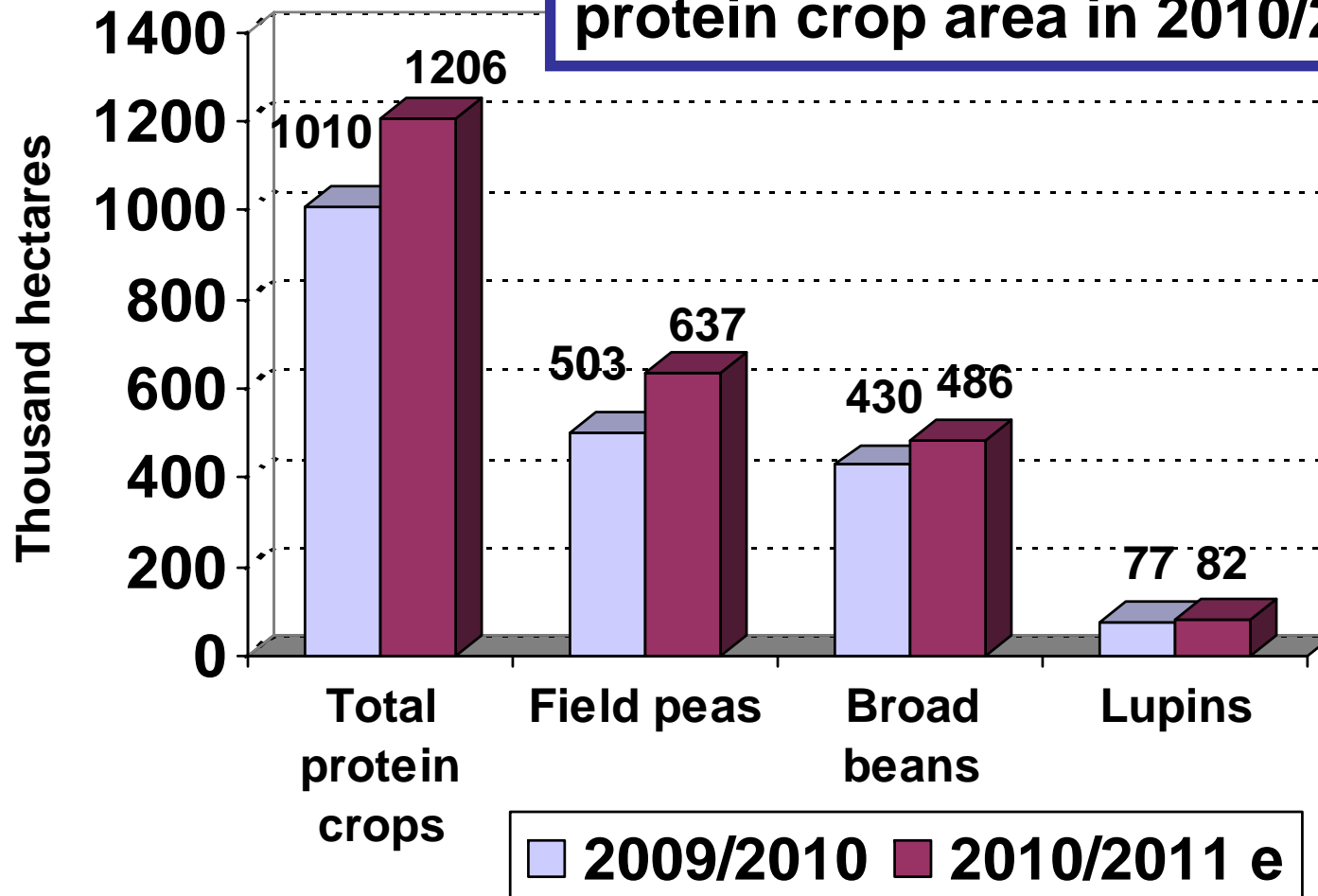


EU27 Oilseed area



EU27 protein crop area

Estimated 19.4% increase in EU27 protein crop area in 2010/2011



EU 27 Oilseed & protein crop production

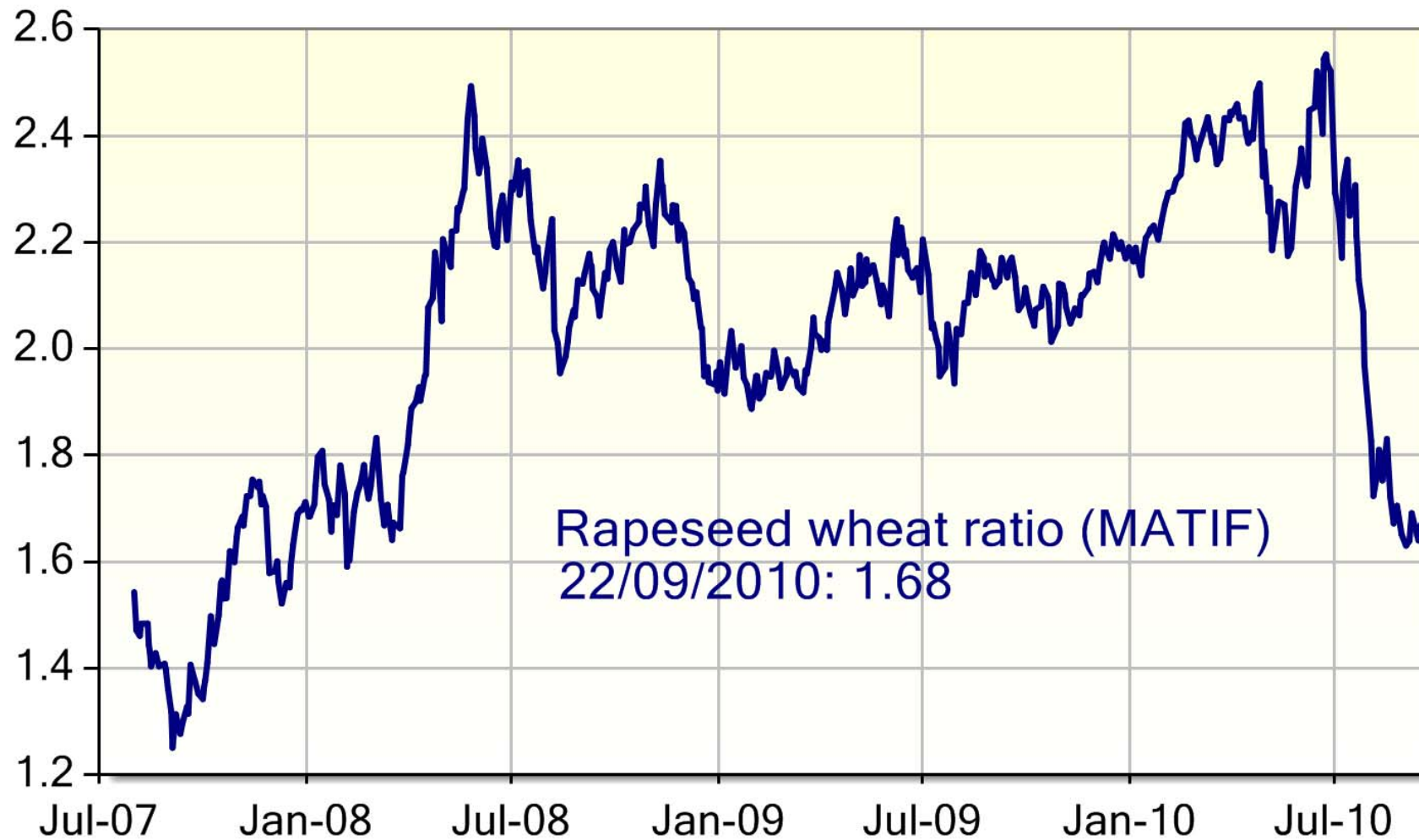
Mio t	2009	2010 23-Jun	2010 16-Sep	%change 2010/2009
TOTAL OILSEEDS	29.2	29.0	28.4	-2.5
Oilseed rape	21.5	21.2	20.6	-4.1
Sunflower	6.7	6.8	6.8	0.7
Soybeans	0.8	0.9	0.9	11.7
Linseed	0.13	0.11	0.13	0.0
TOTAL PROTEIN CROPS	2.8	3.1	3.5	24.6
Field peas	1.3	1.6	1.9	49.5
Field beans	1.4	1.4	1.4	3.6
Lupines	0.11	0.11	0.11	0.9

Sources : DG AGRI

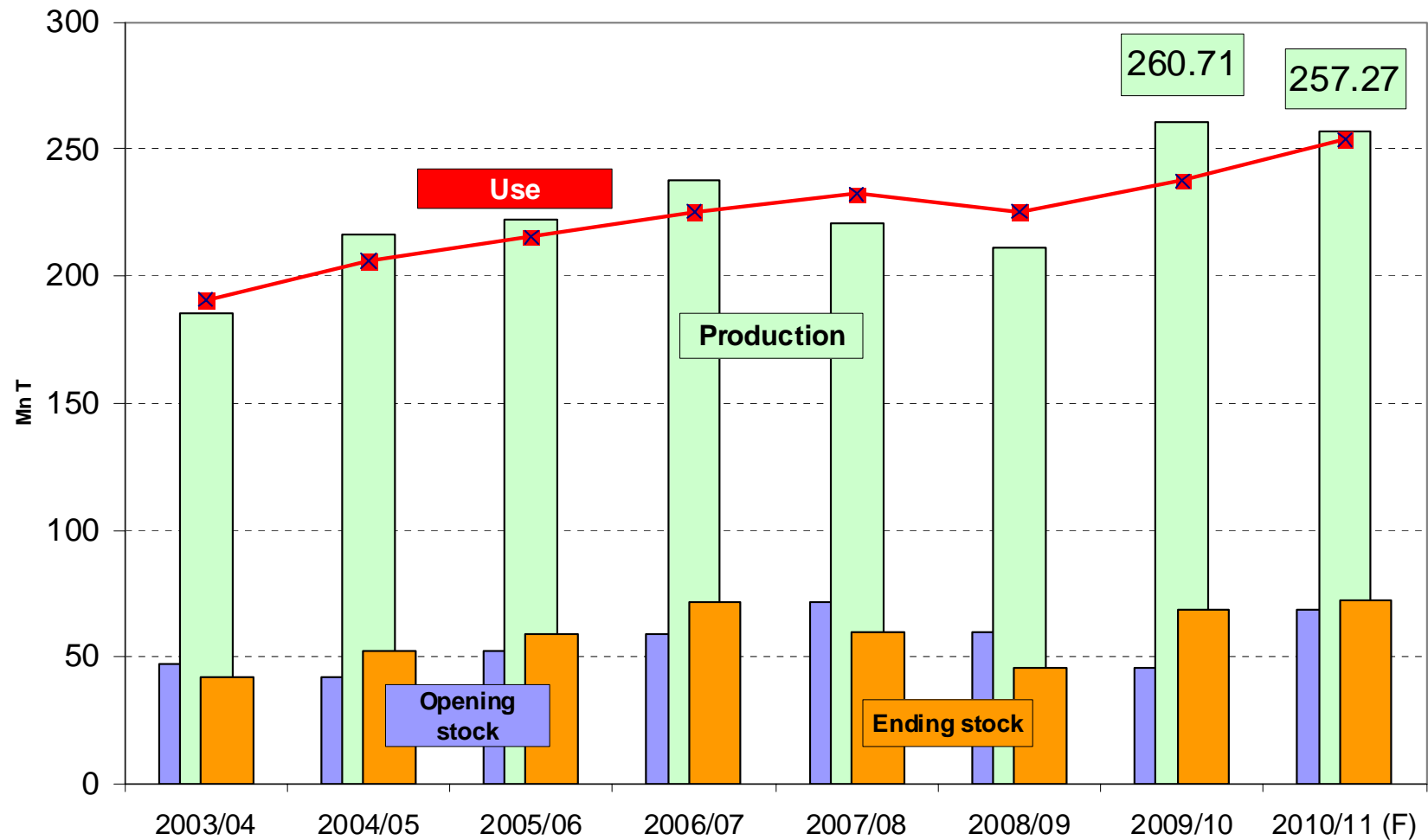


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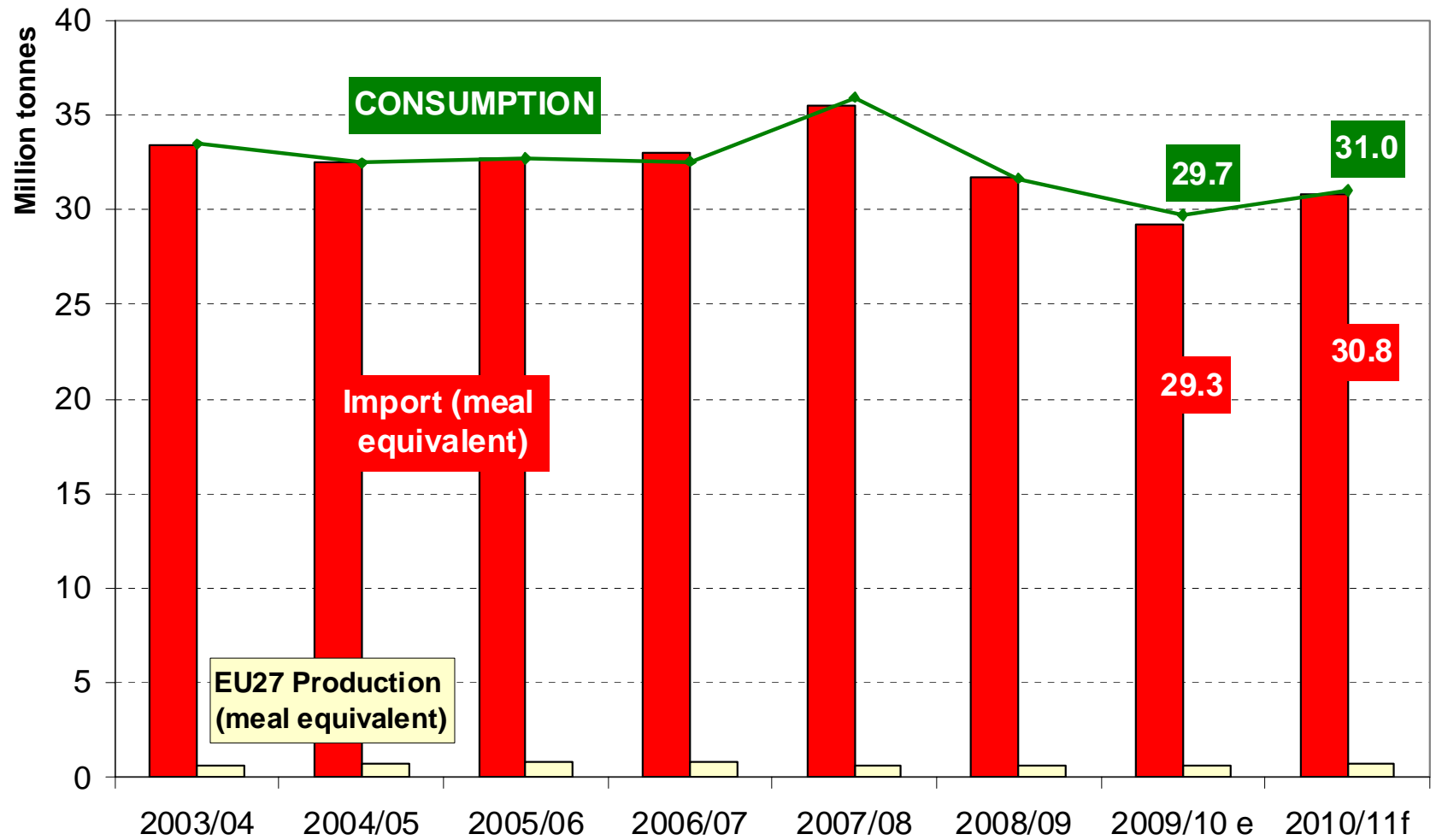
Oilseed rape / Wheat ratio



World soybean balance



EU27 soya balance





Thank you



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