

EU COP forecasts 2010/11

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

Advisory Group, Brussels, 24/09/2010



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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

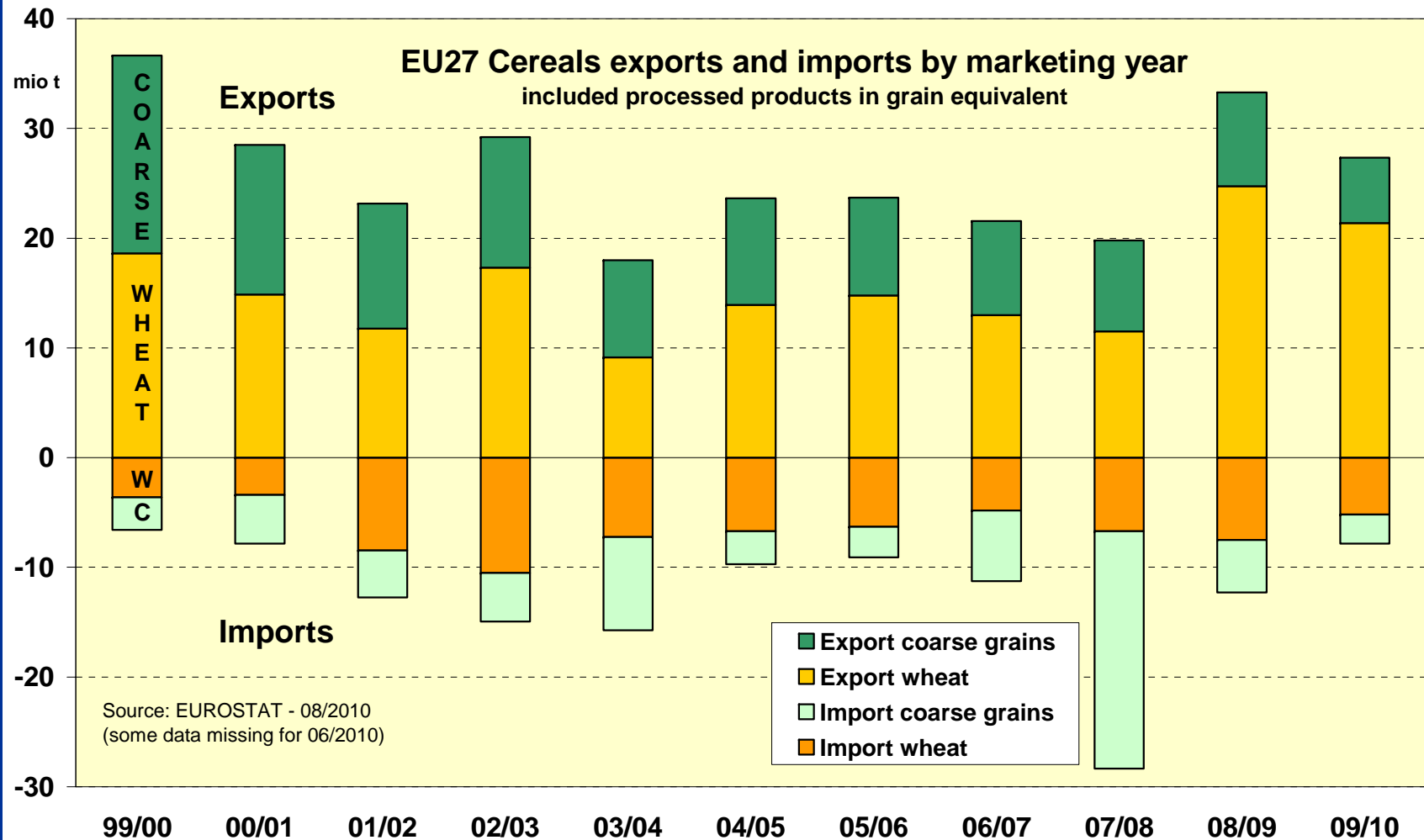
| EU-27 | Cereals balance sheet: Marketing year: 2009/2010 | | | | | | | | | |
|--------------------------------------|--|-------------|-------------|-------------|-------------|------------|------------|-------------|------------|----------------|
| <i>Jun-10</i> | Common wheat | Barley | Durum | Maize | 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.

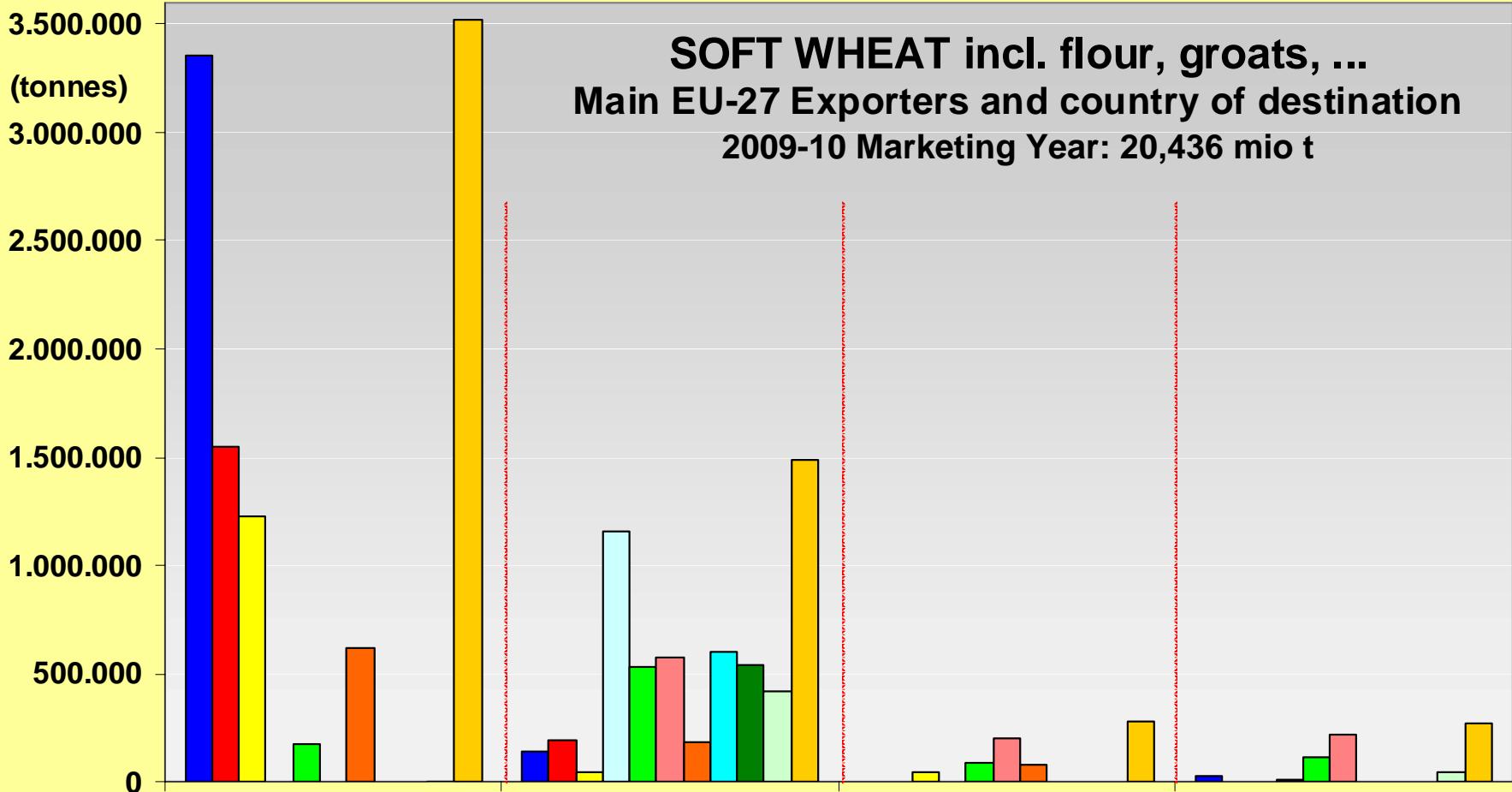


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EU 27 TRADE



2009/10 trade: EU wheat exporters and destinations



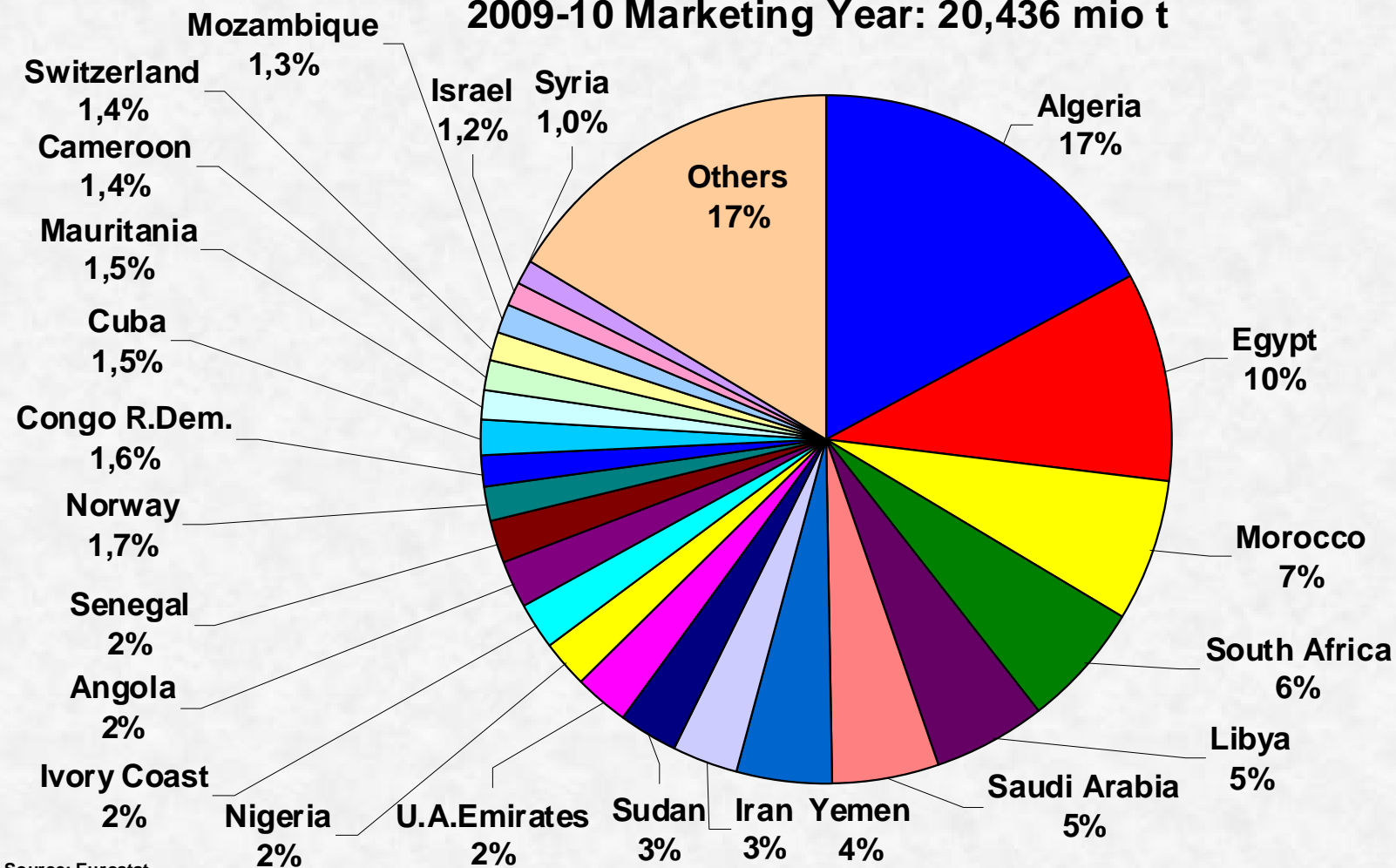
Source: Eurostat

- 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

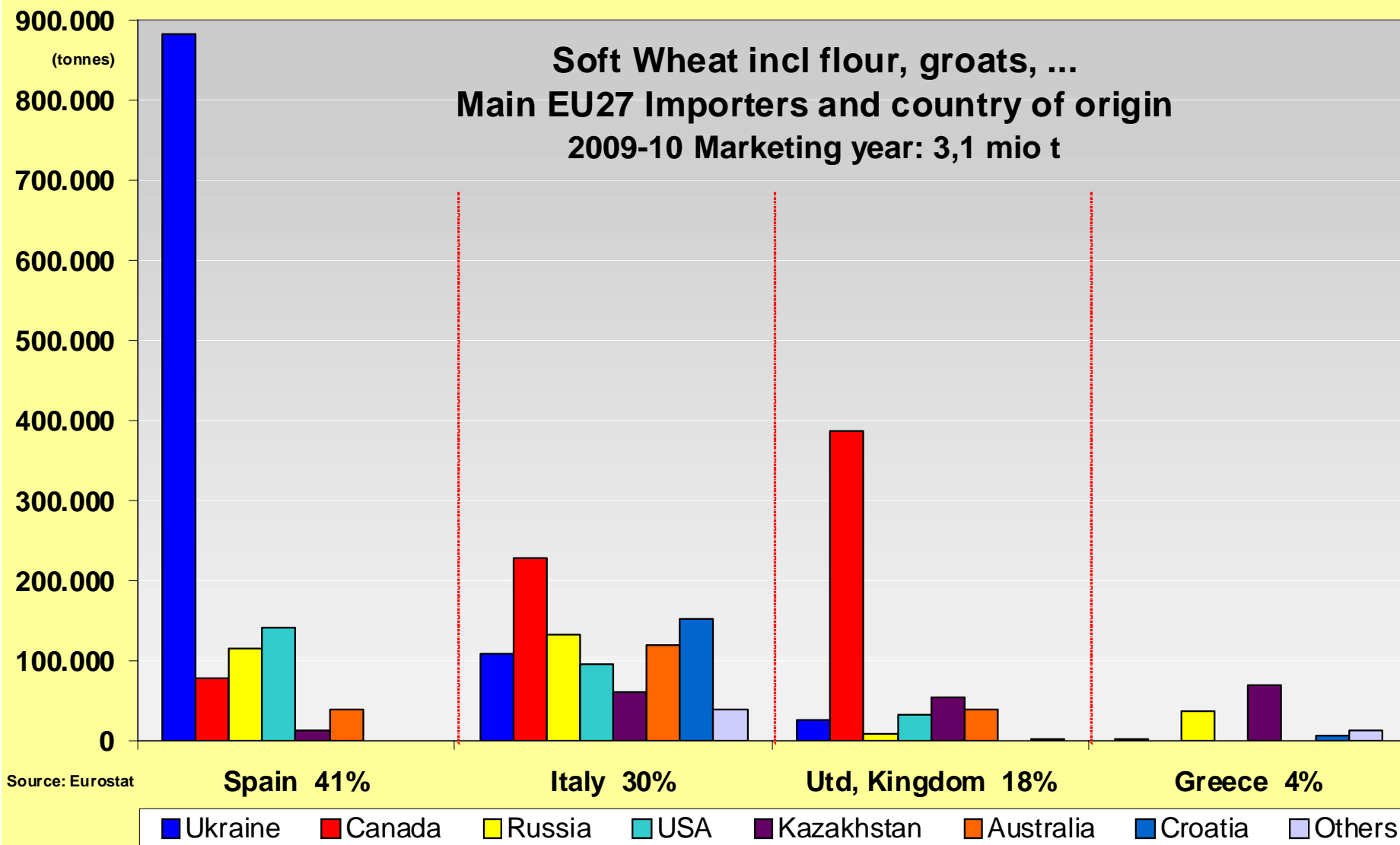
2009-10 Marketing Year: 20,436 mio t



Source: Eurostat

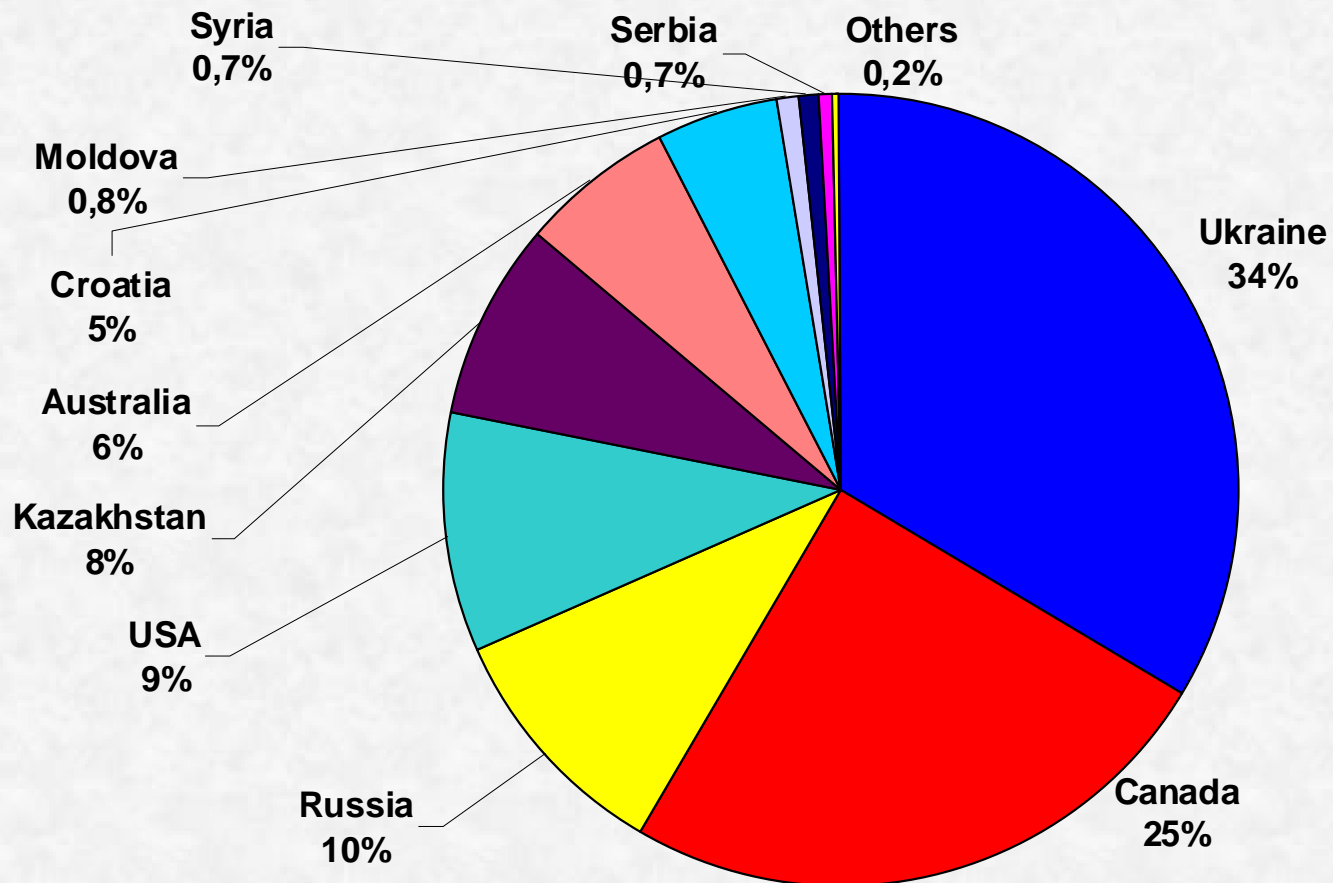
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2009/10 trade: EU wheat importers and origins



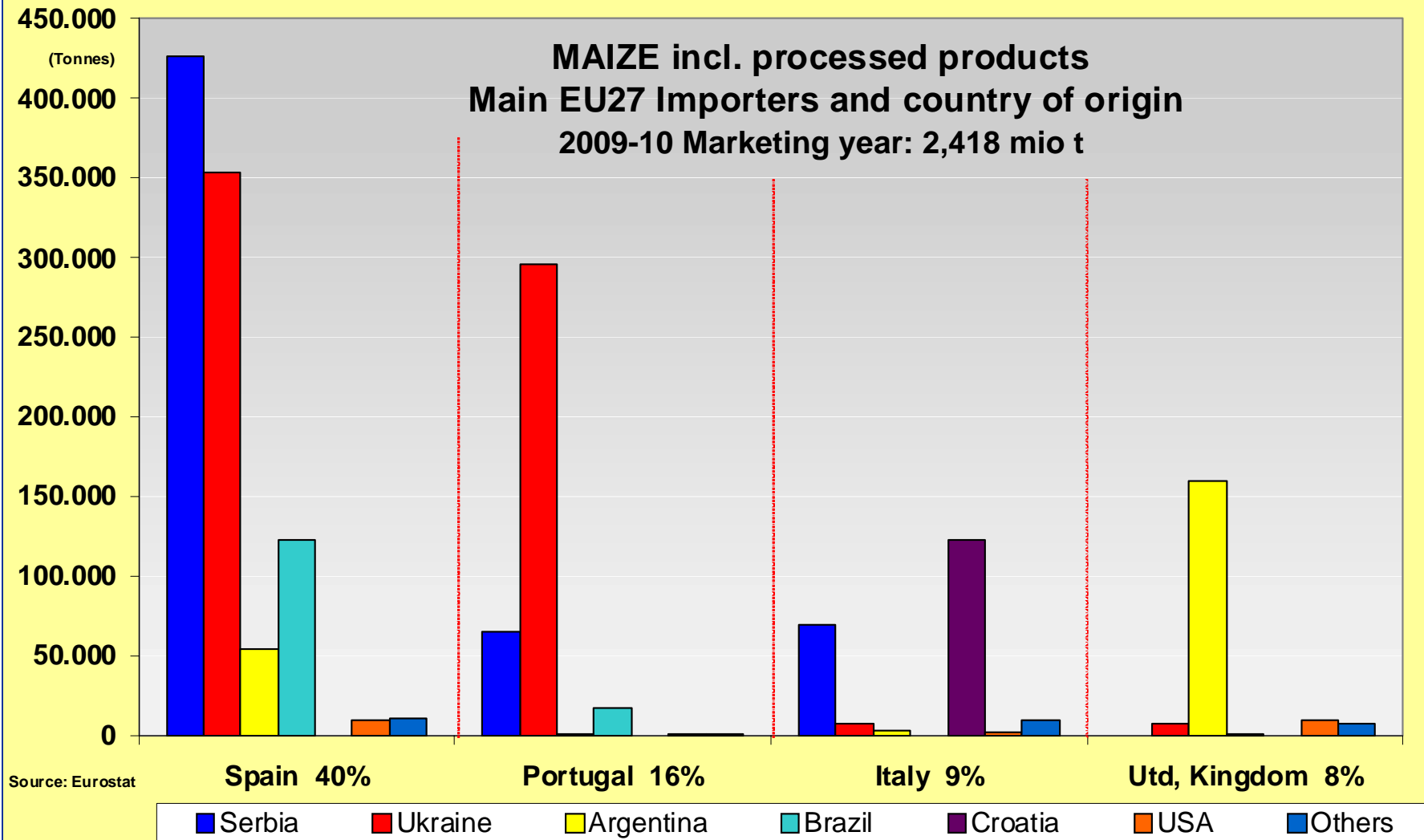
2009/10 trade: EU wheat imports origins

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



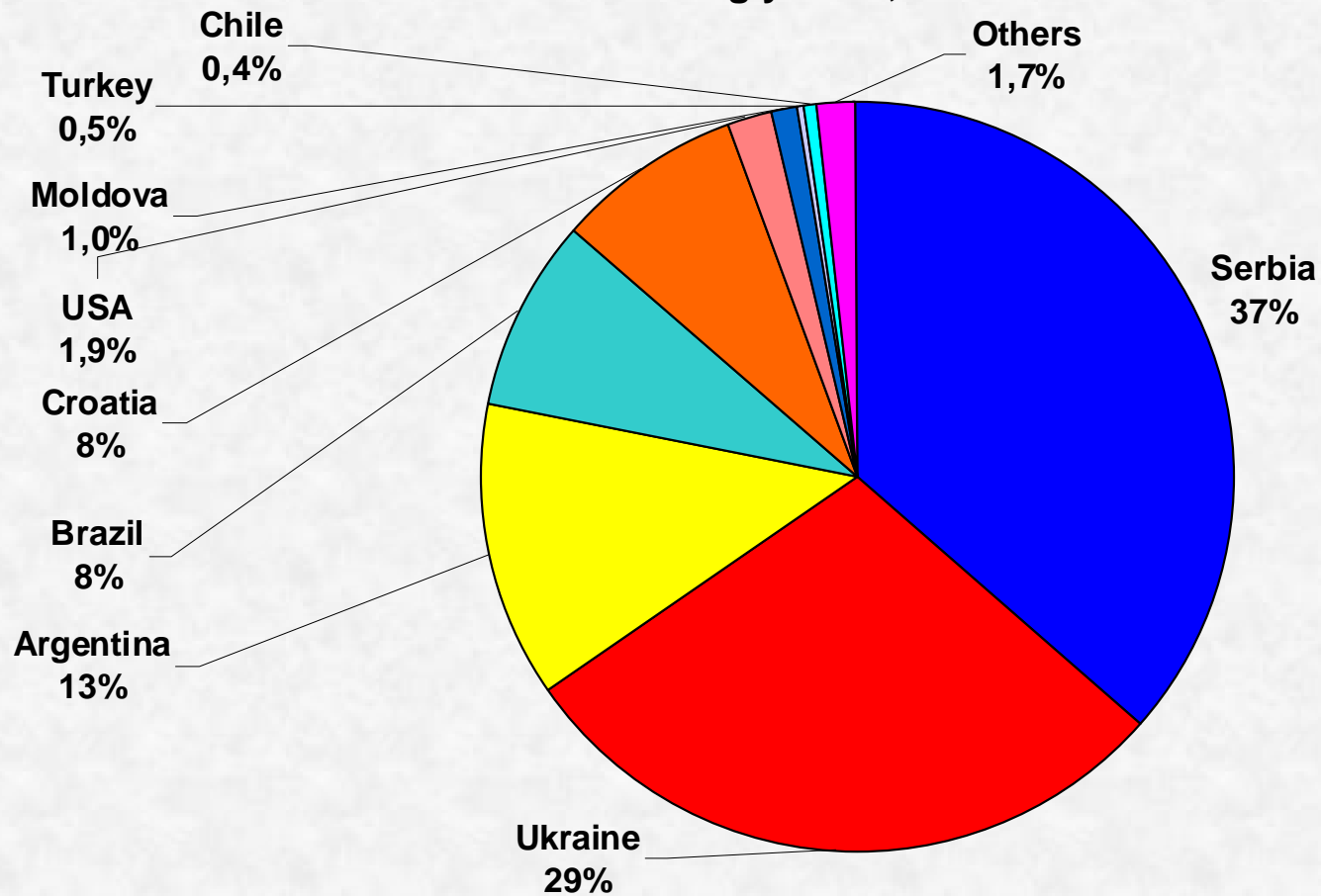
Source: Eurostat

2009/10 trade: EU maize importers and origins



2009/10 trade: EU maize imports origins

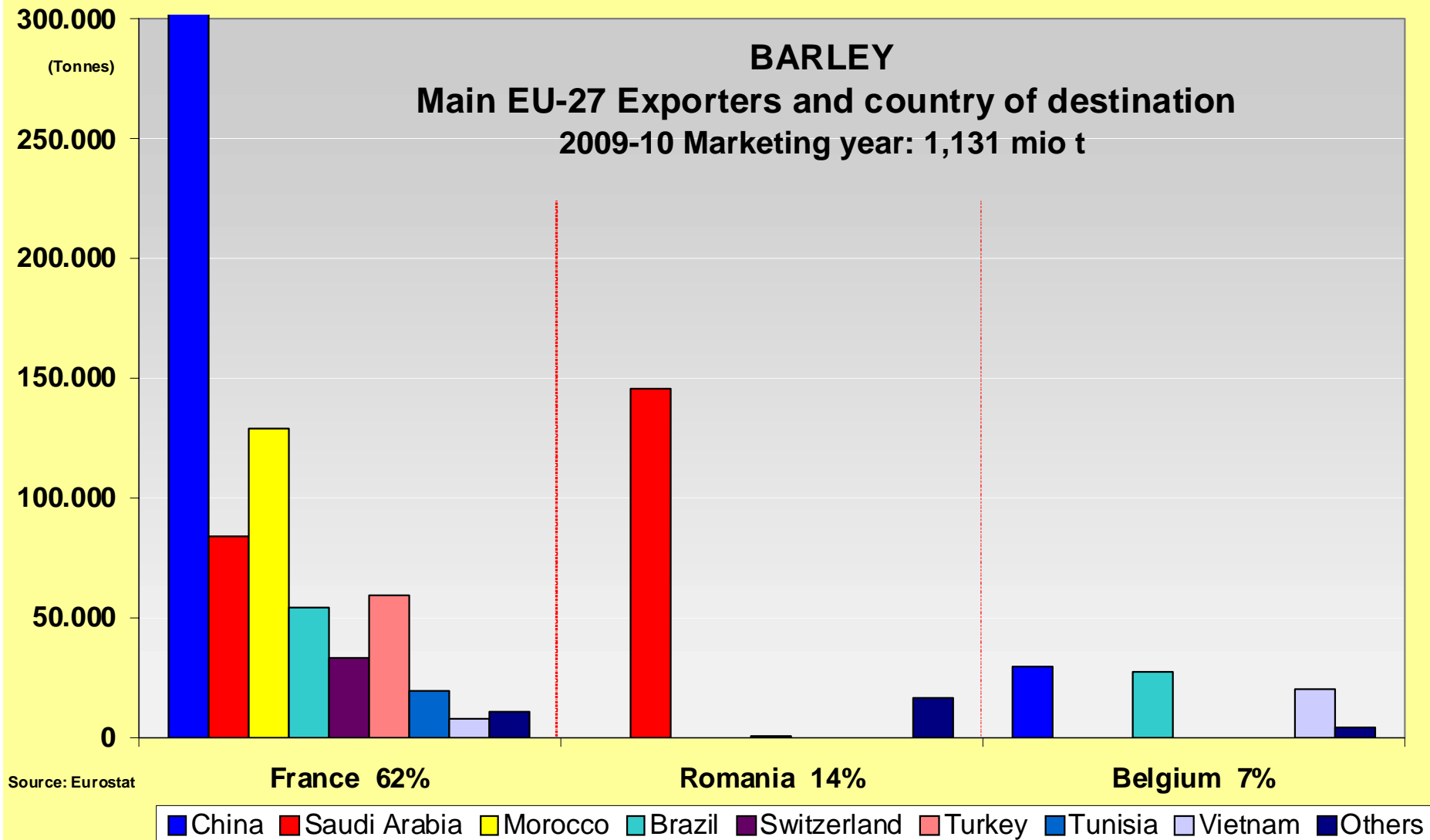
MAIZE incl. processed products - EU27 Imports origins
2009-10 Marketing year: 2,418 mio t



Source: Eurostat

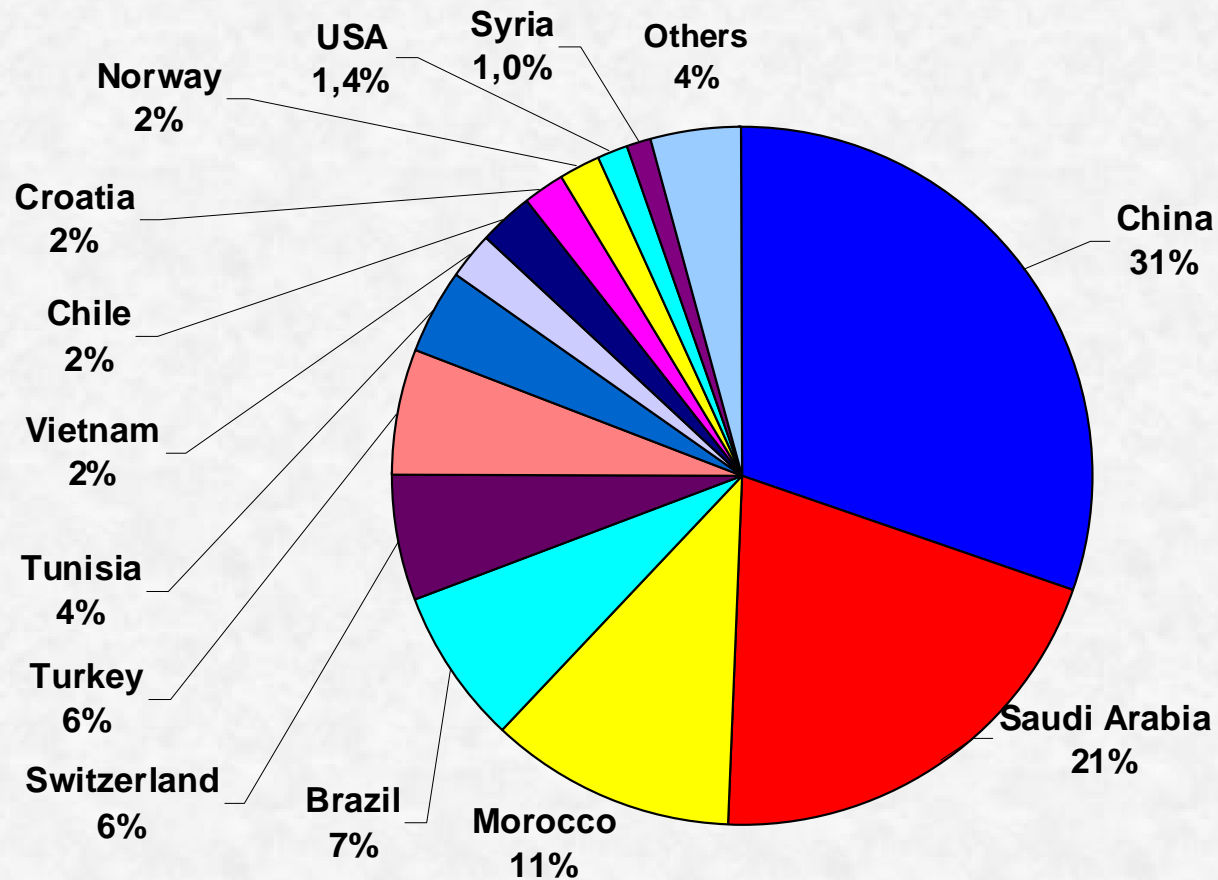
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2009/10 trade: EU barley exporters and destinations



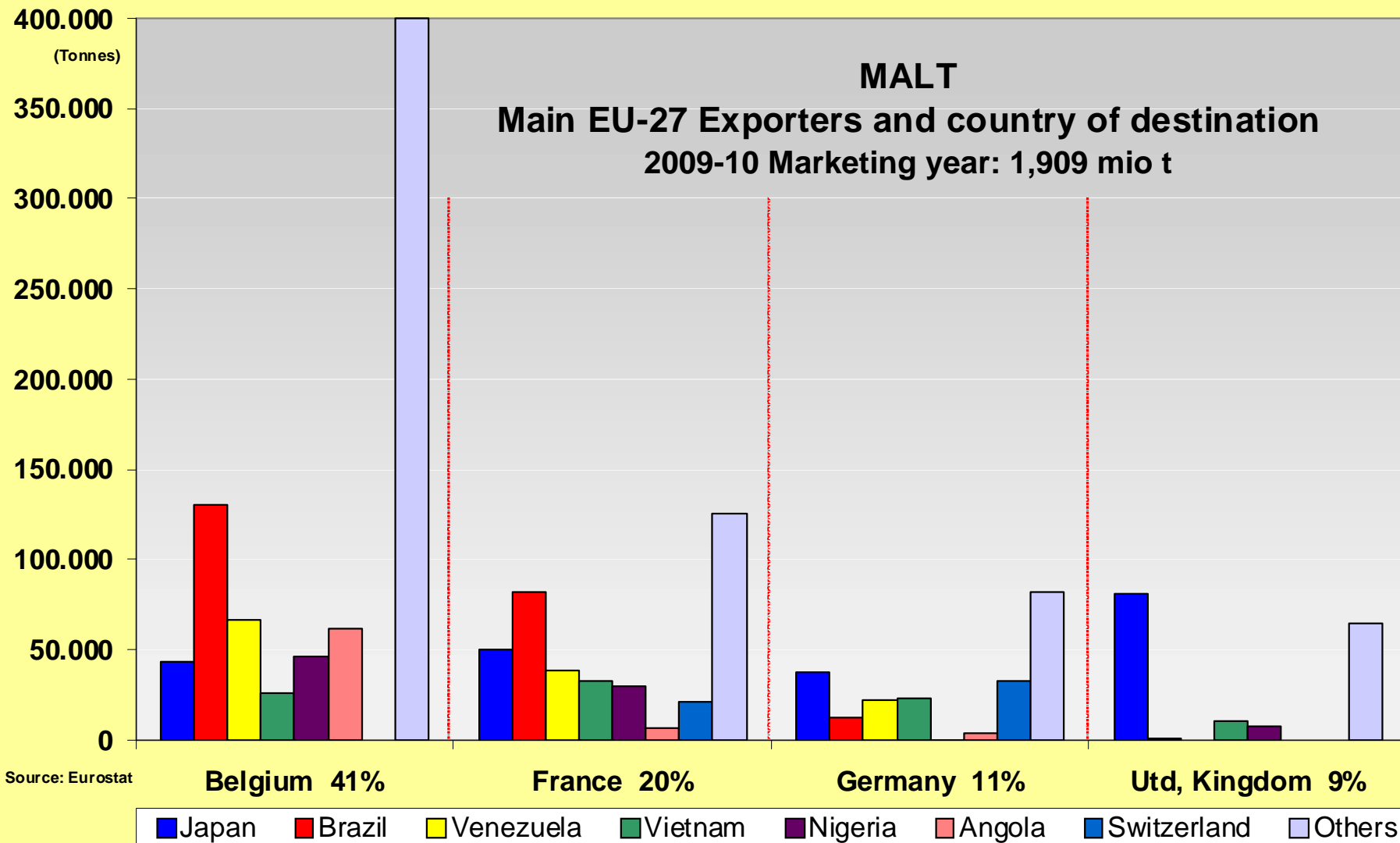
2009/10 trade: EU barley exports destinations

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



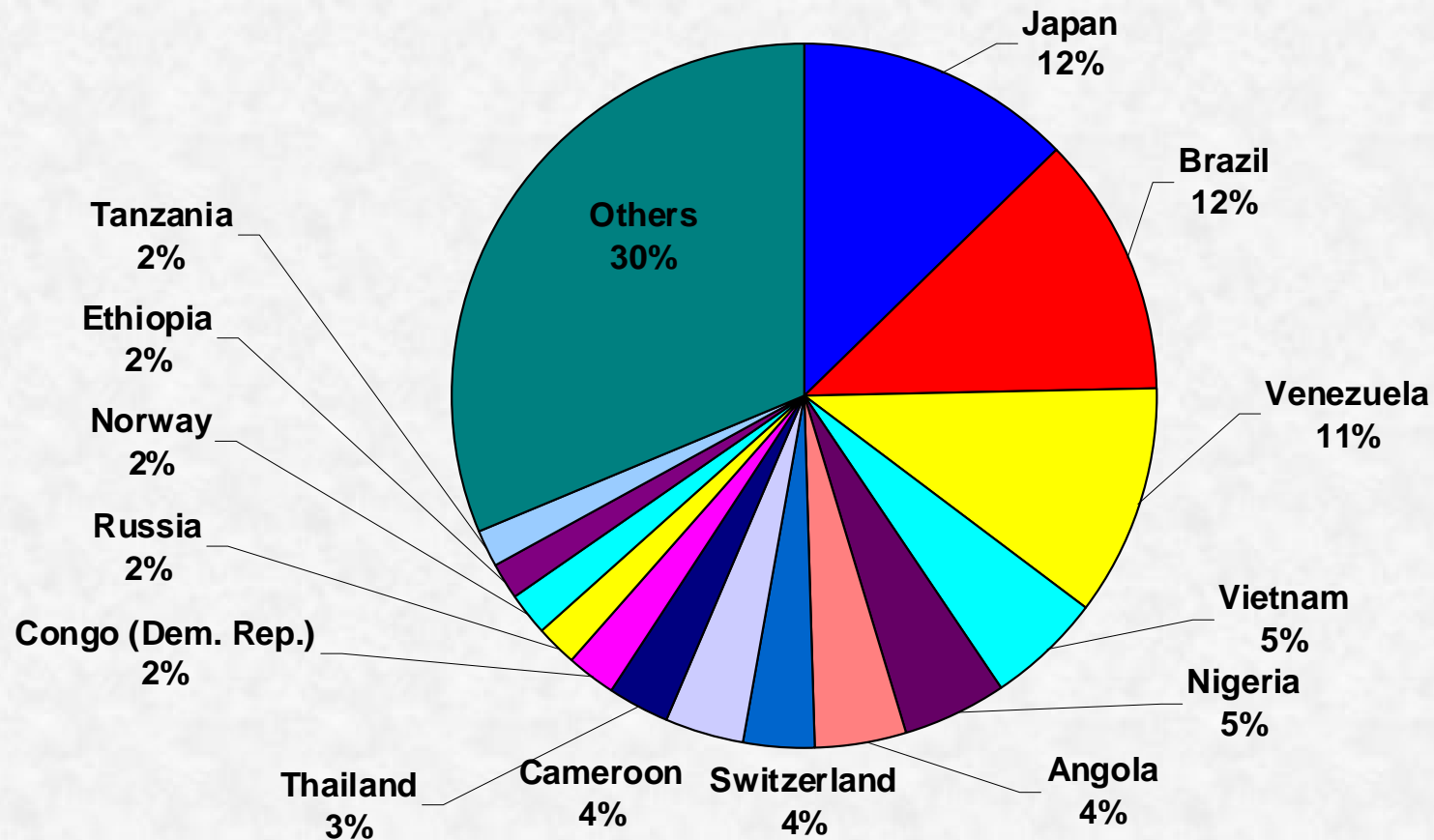
Source: Eurostat

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)

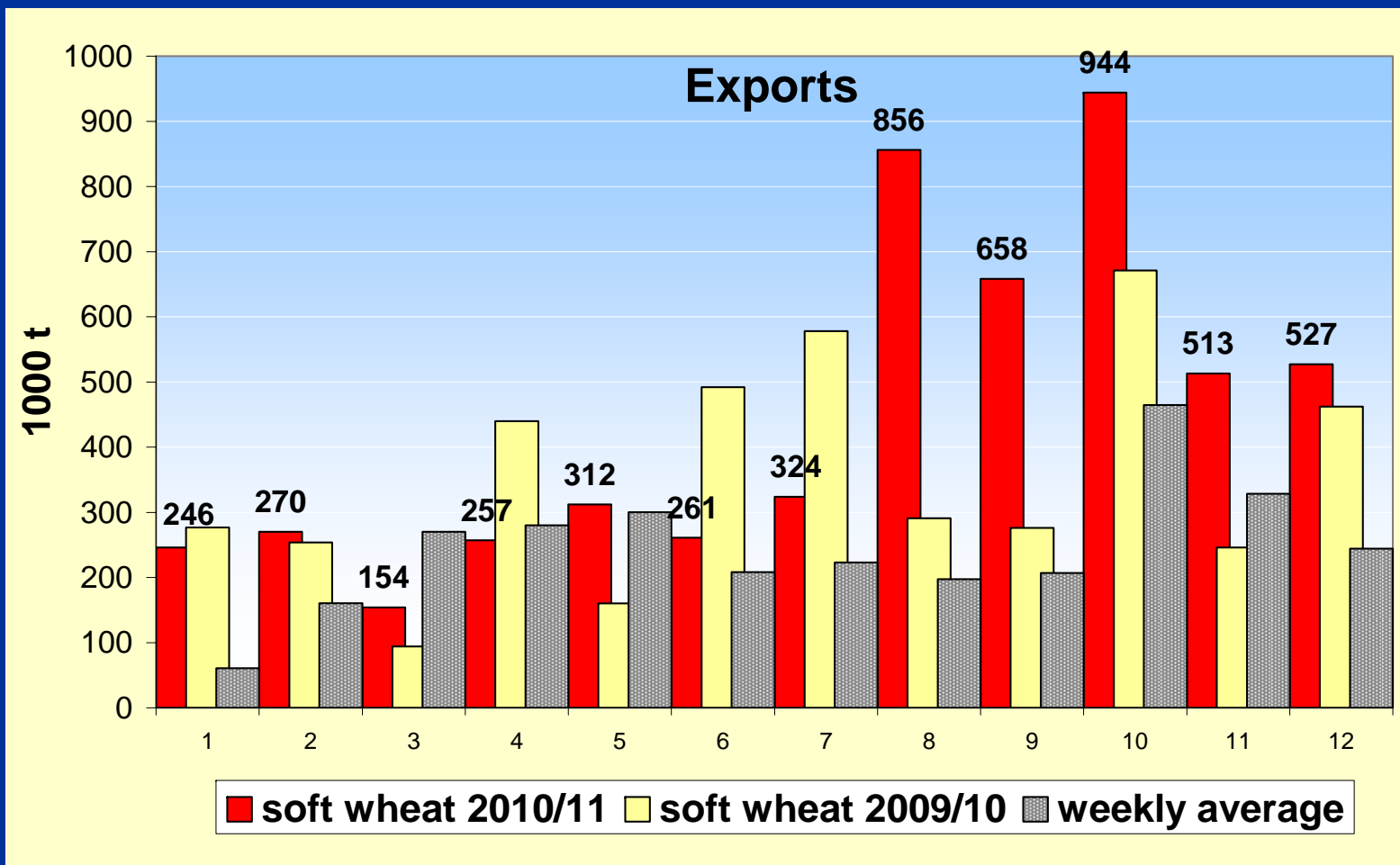
- **Net exporter: 5.3 mio t (2.9 one year ago)**



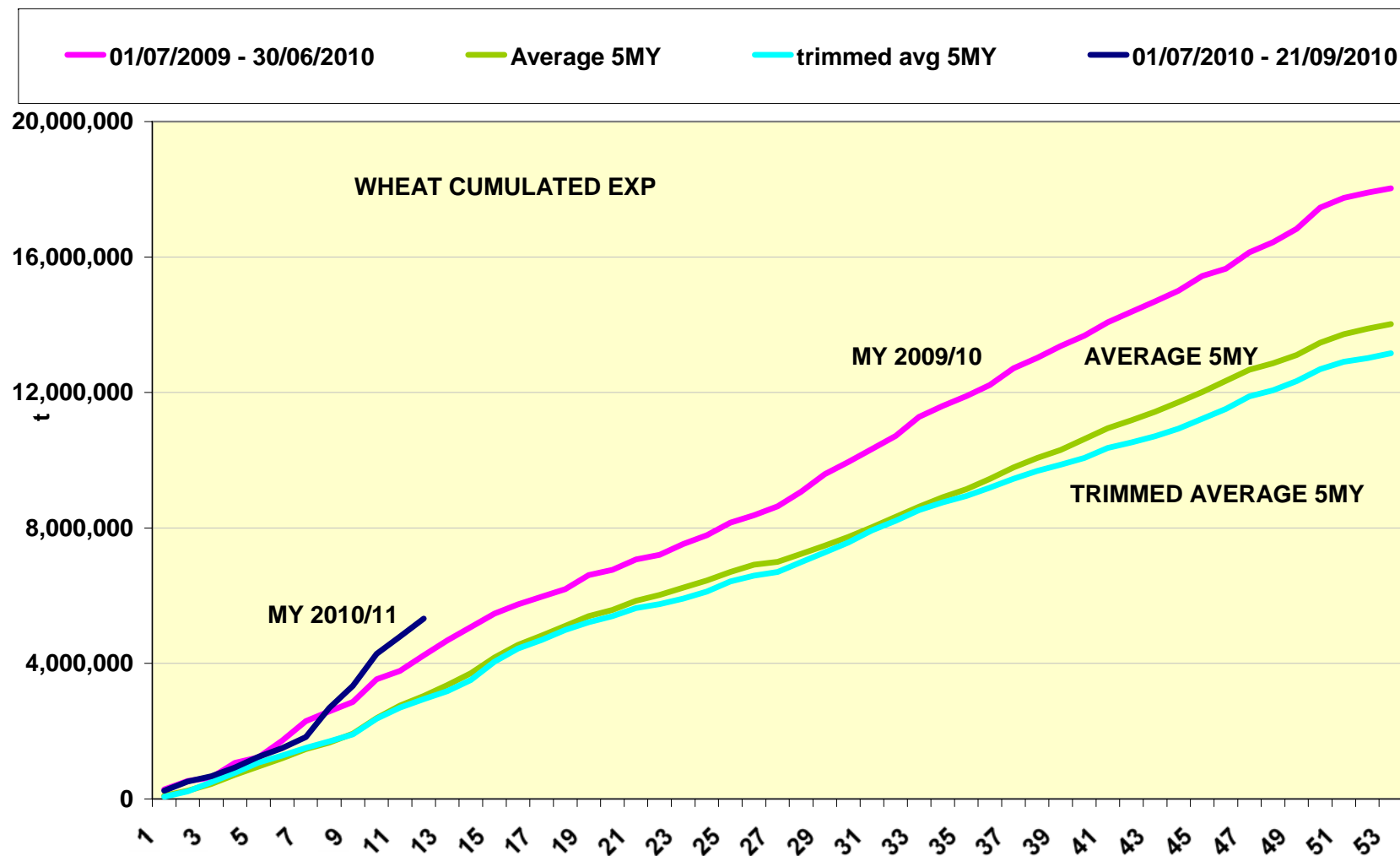
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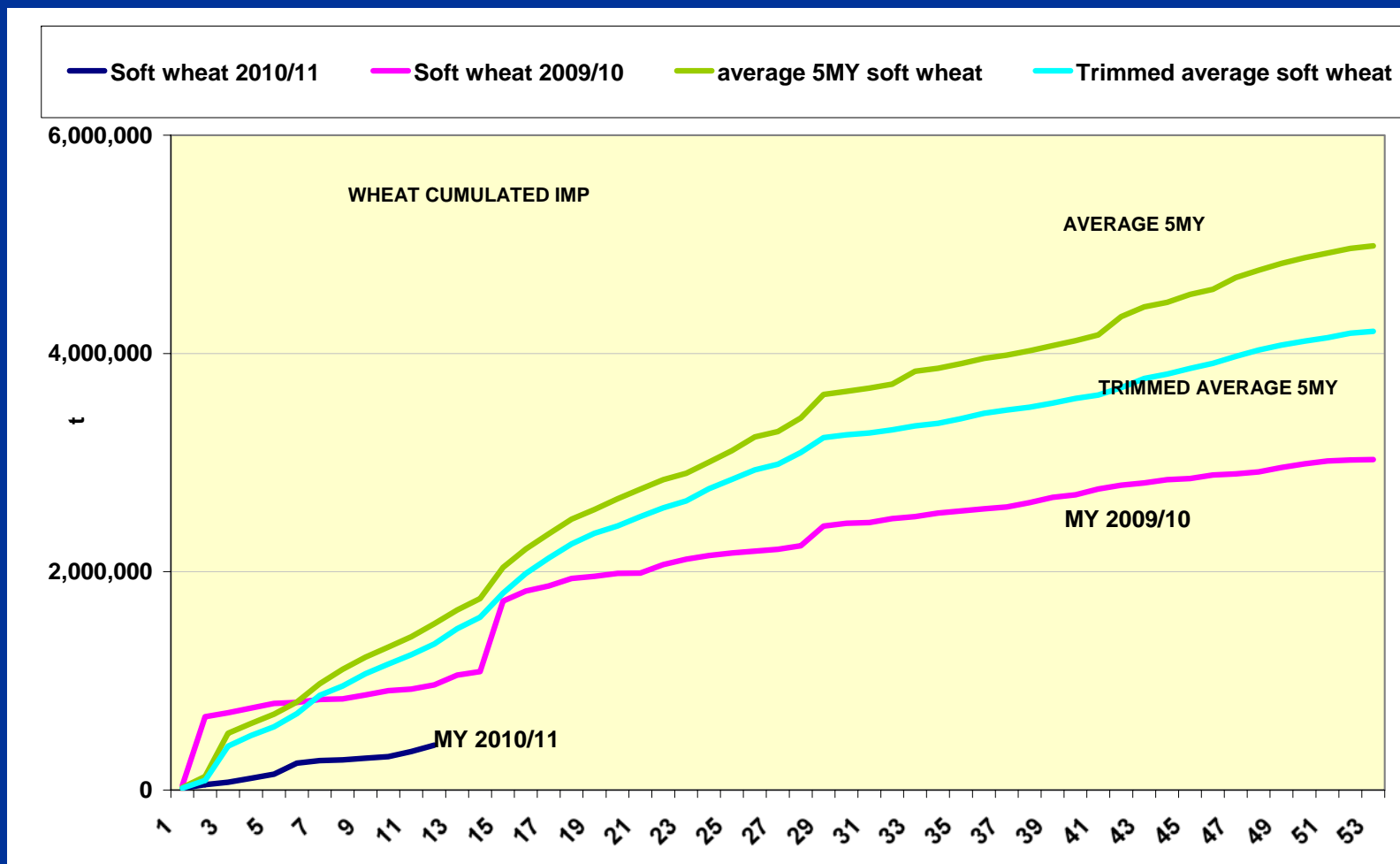
EU wheat exports in recent weeks



EU Wheat cumulated export commitments

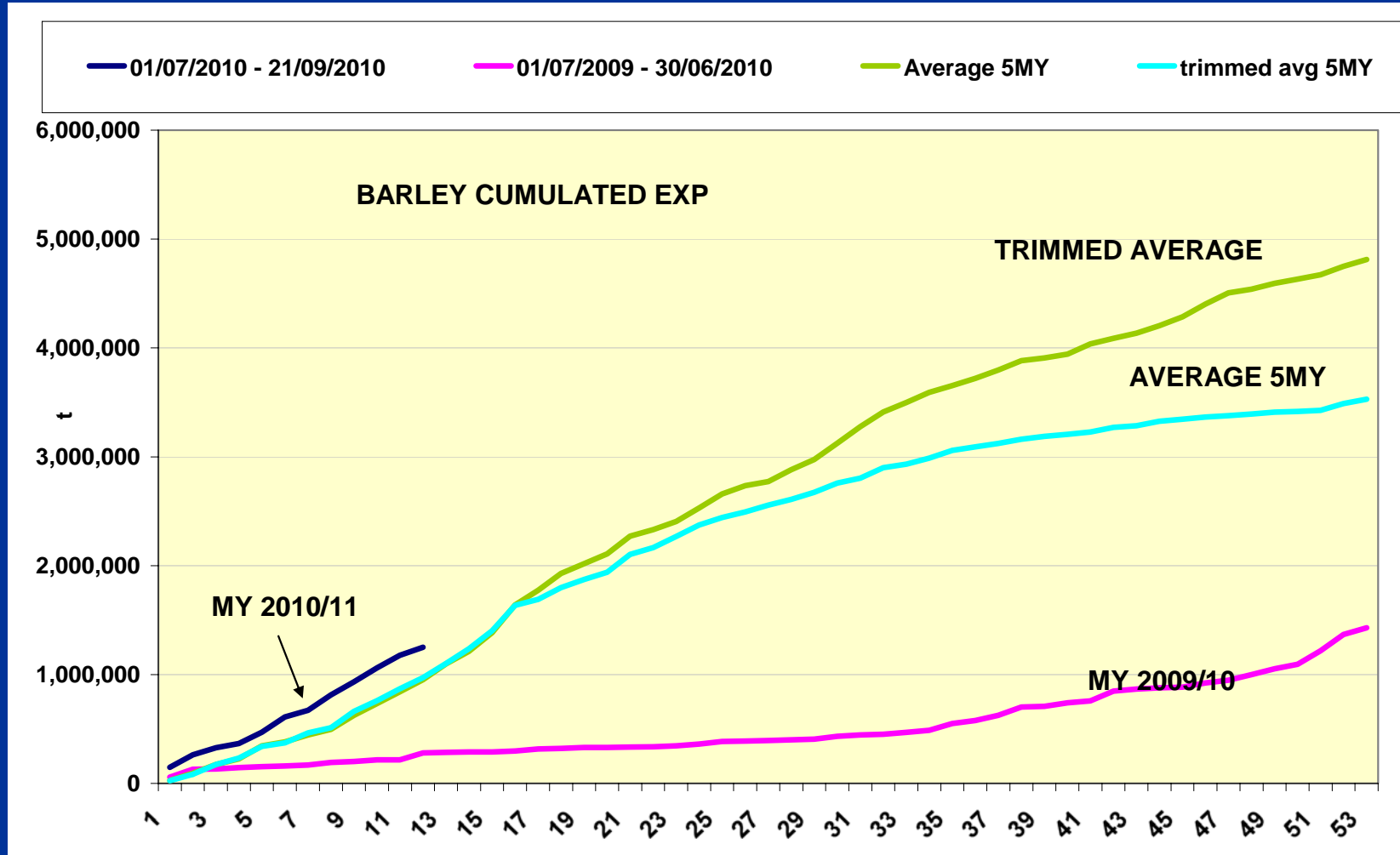


EU Wheat cumulated import commitments

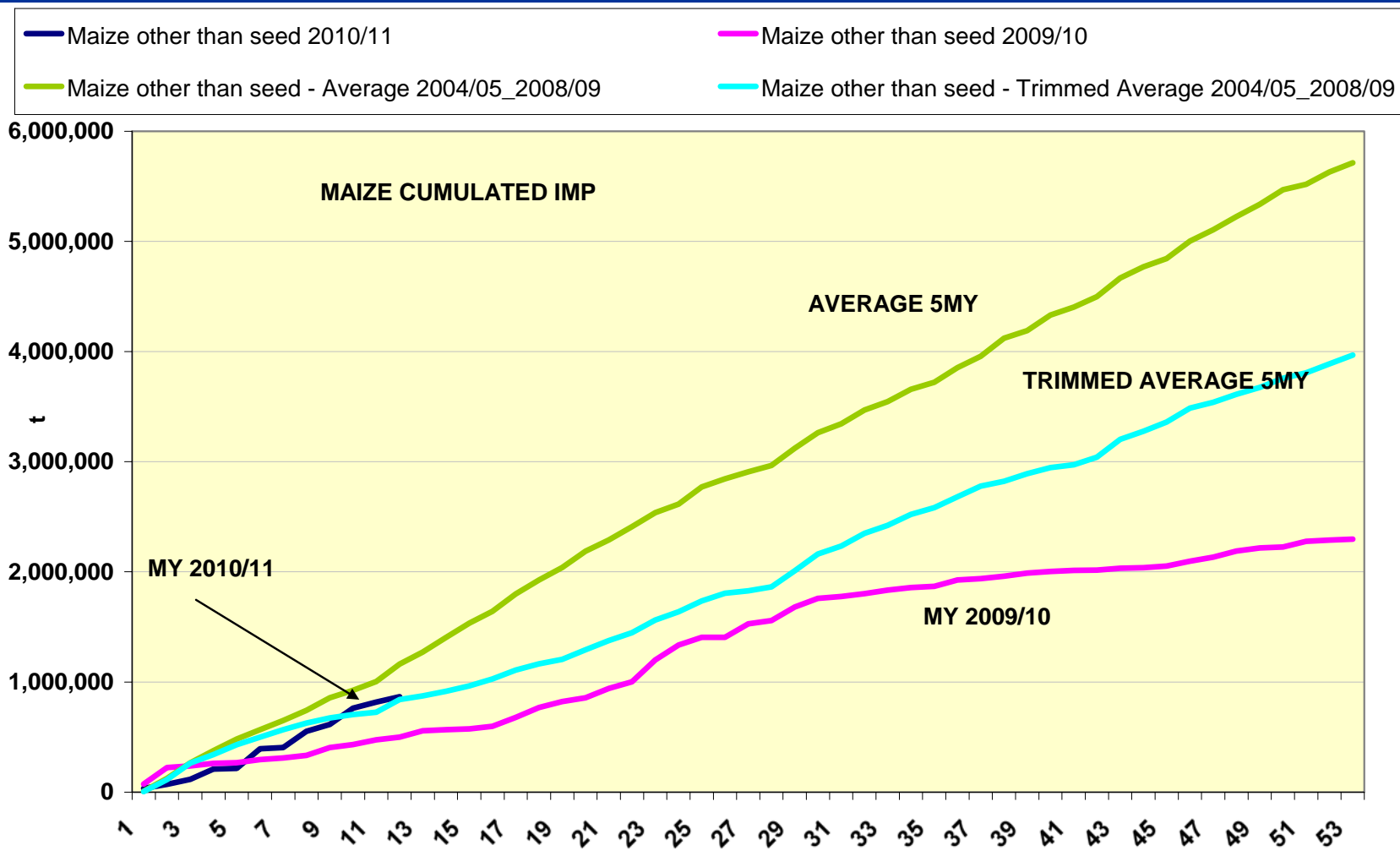


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EU Barley cumulated export commitments



EU Maize cumulated import commitments



EU 27 Balance sheet

| EU-27 | Cereals balance sheet:Marketing year: | | | | | | | | | 2010/2011 | (Mio t) |
|---|---------------------------------------|-------------|-------------|-------------|------------|------------|------------|-------------|------------|--------------|---------|
| <i>Sep-10</i> | 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

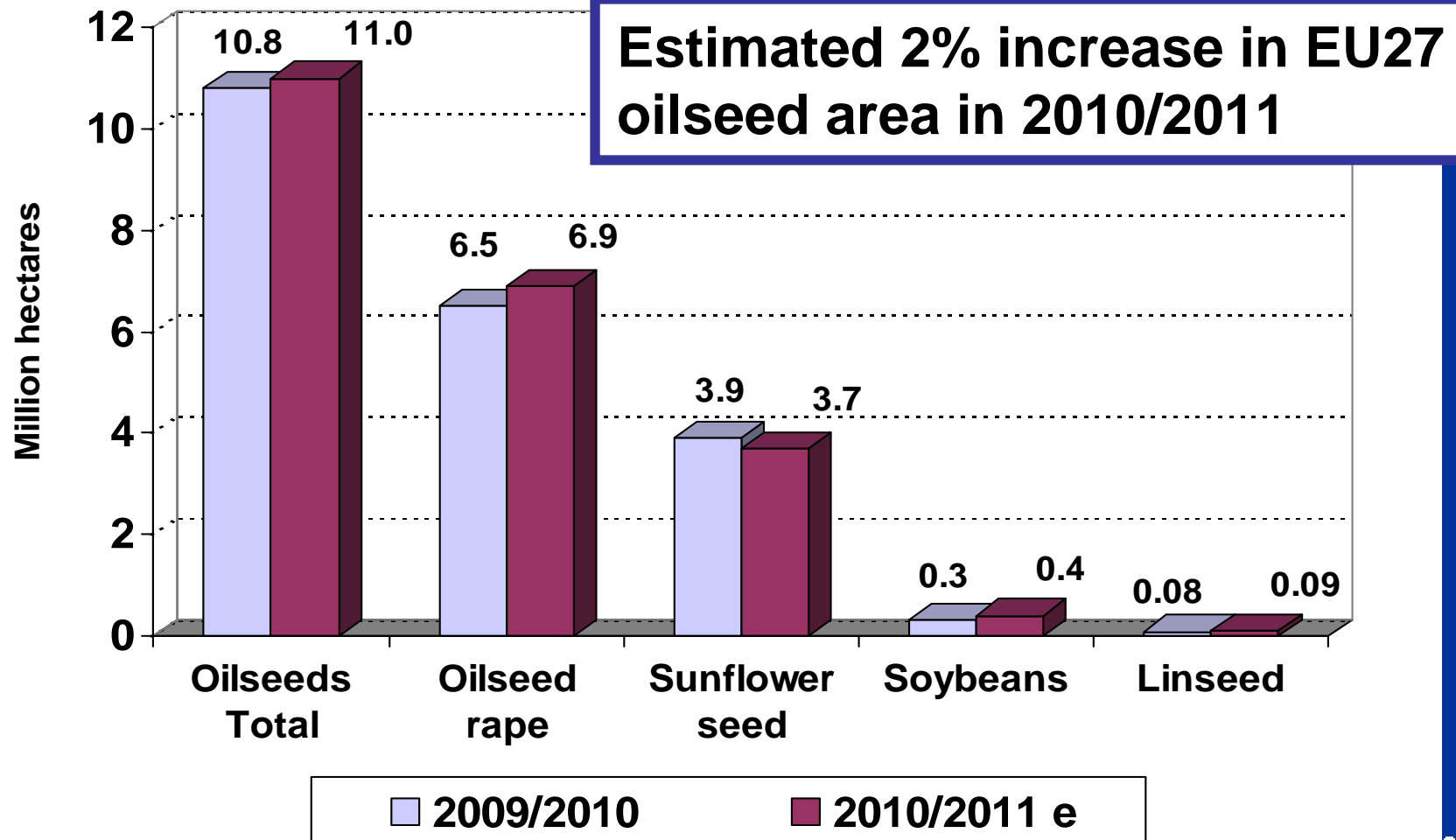


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24 Sept 2010

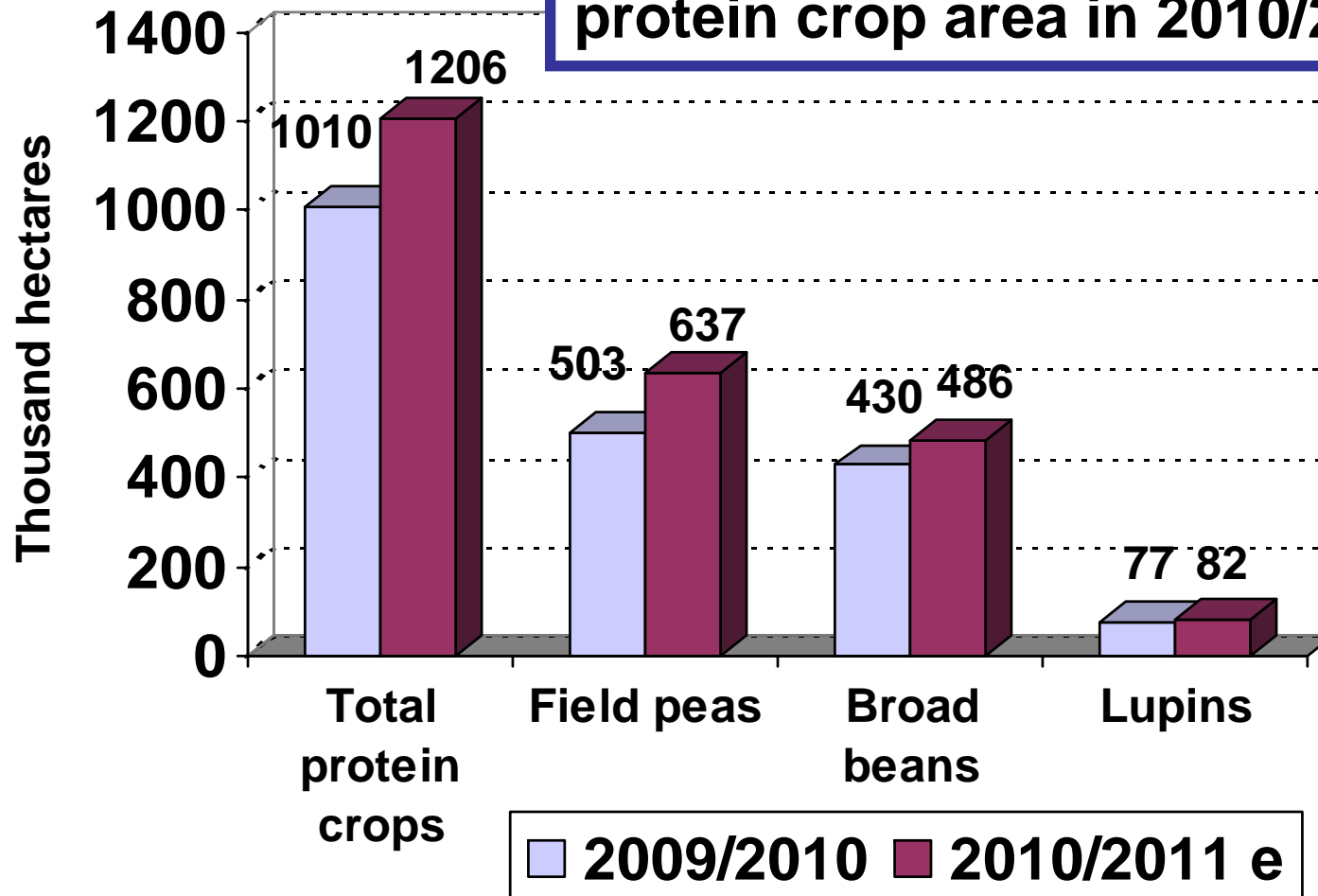


EU27 Oilseed area



EU27 protein crop area

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



EU 27 Oilseed & protein crop production

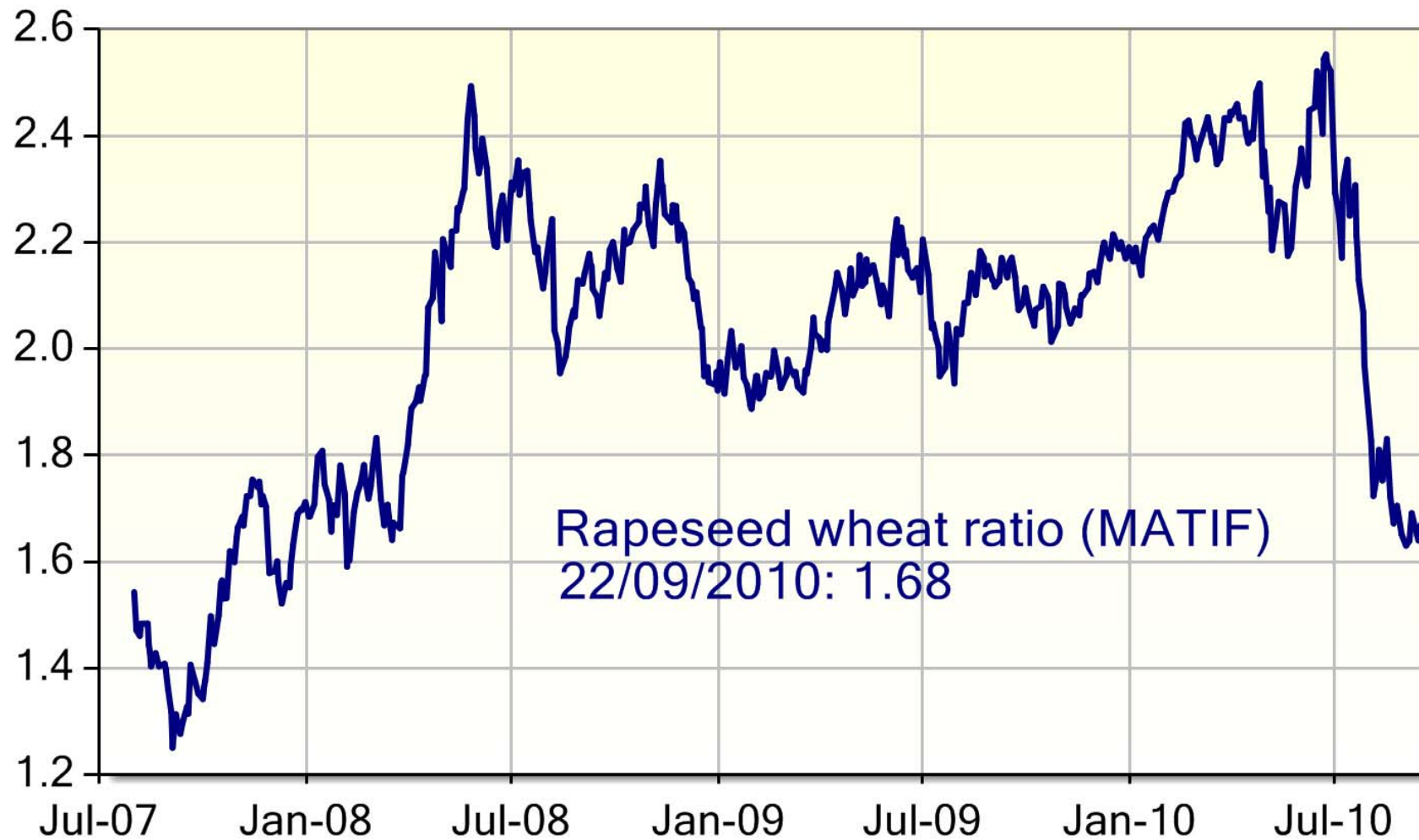
| Mio t | 2009 | 2010 23-Jun | 2010 16-Sep | %change 2010/2009 |
|----------------------------|------|----------------|----------------|----------------------|
| TOTAL OILSEEDS | 29.2 | 29.0 | 28.4 | -2.5 |
| Oilseed rape | 21.5 | 21.2 | 20.6 | -4.1 |
| Sunflower | 6.7 | 6.8 | 6.8 | 0.7 |
| Soybeans | 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

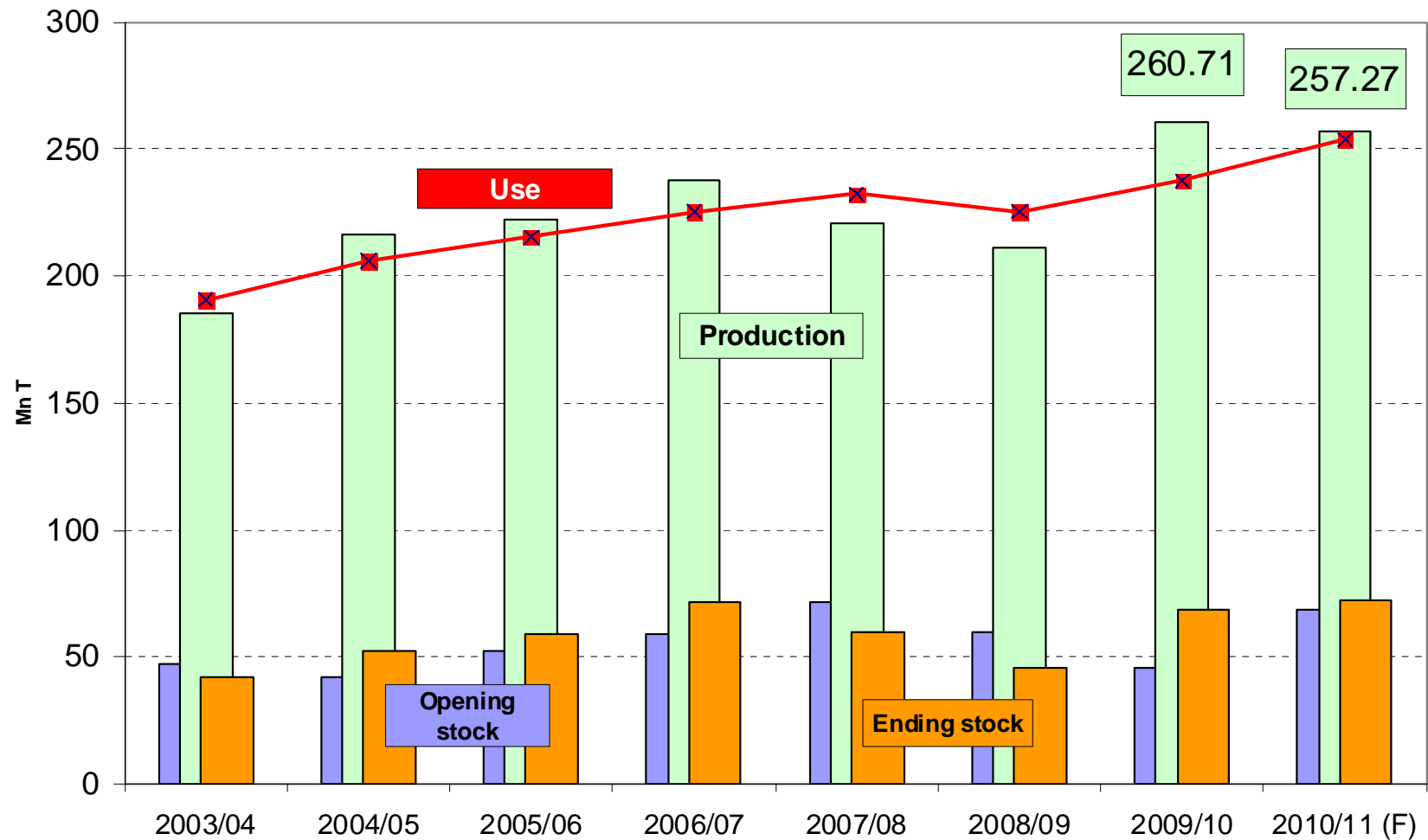


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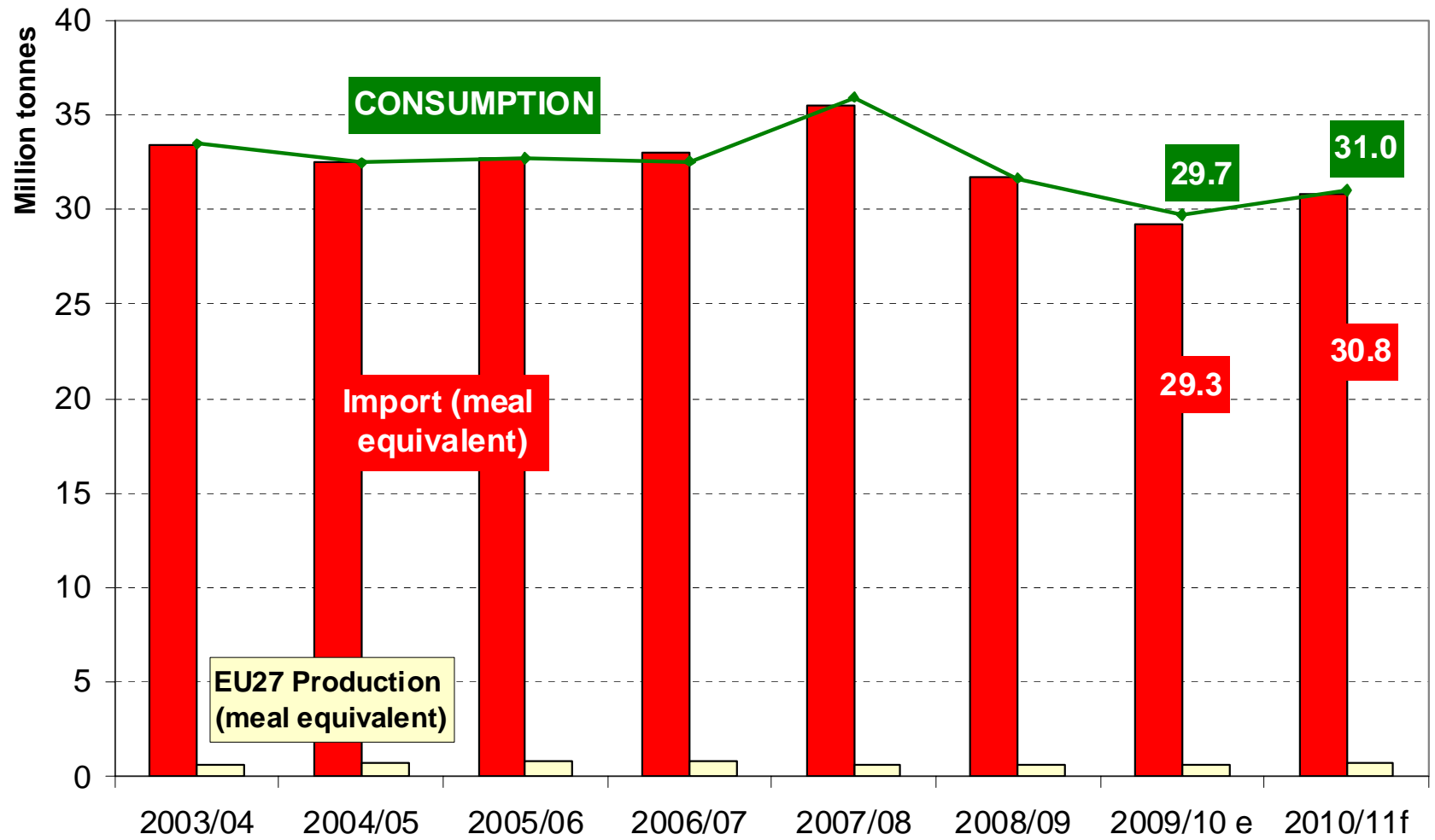
Oilseed rape / Wheat ratio



World soybean balance



EU27 soya balance





Thank you



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