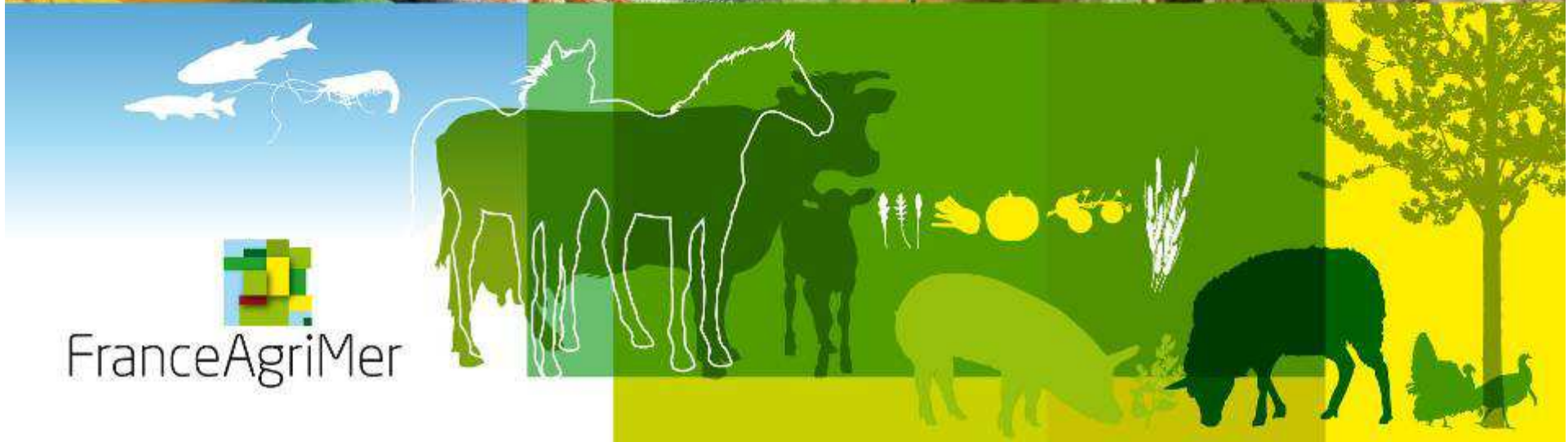


CÉRÉALES /
FRUITS ET LÉGUMES /
HORTICULTURE /
LAIT /
OLÉO-PROTÉAGINEUX /
PÊCHE ET AQUACULTURE /
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /
SUCRE /
VIANDES BLANCHES /
VIANDES ROUGES /
VINS /

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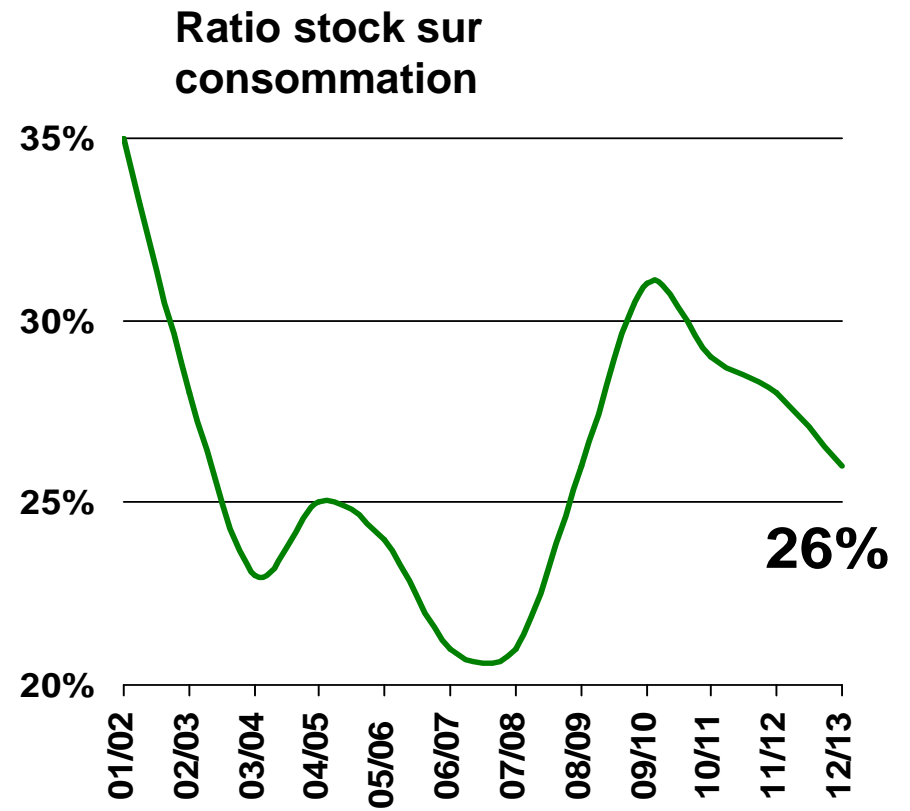
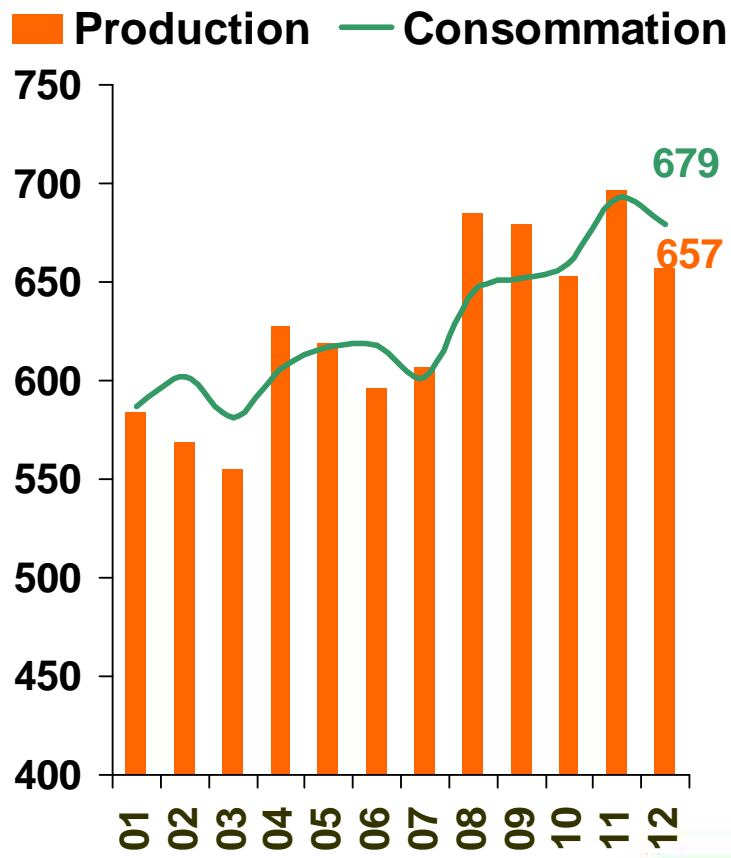
FranceAgriMer

Marché mondial

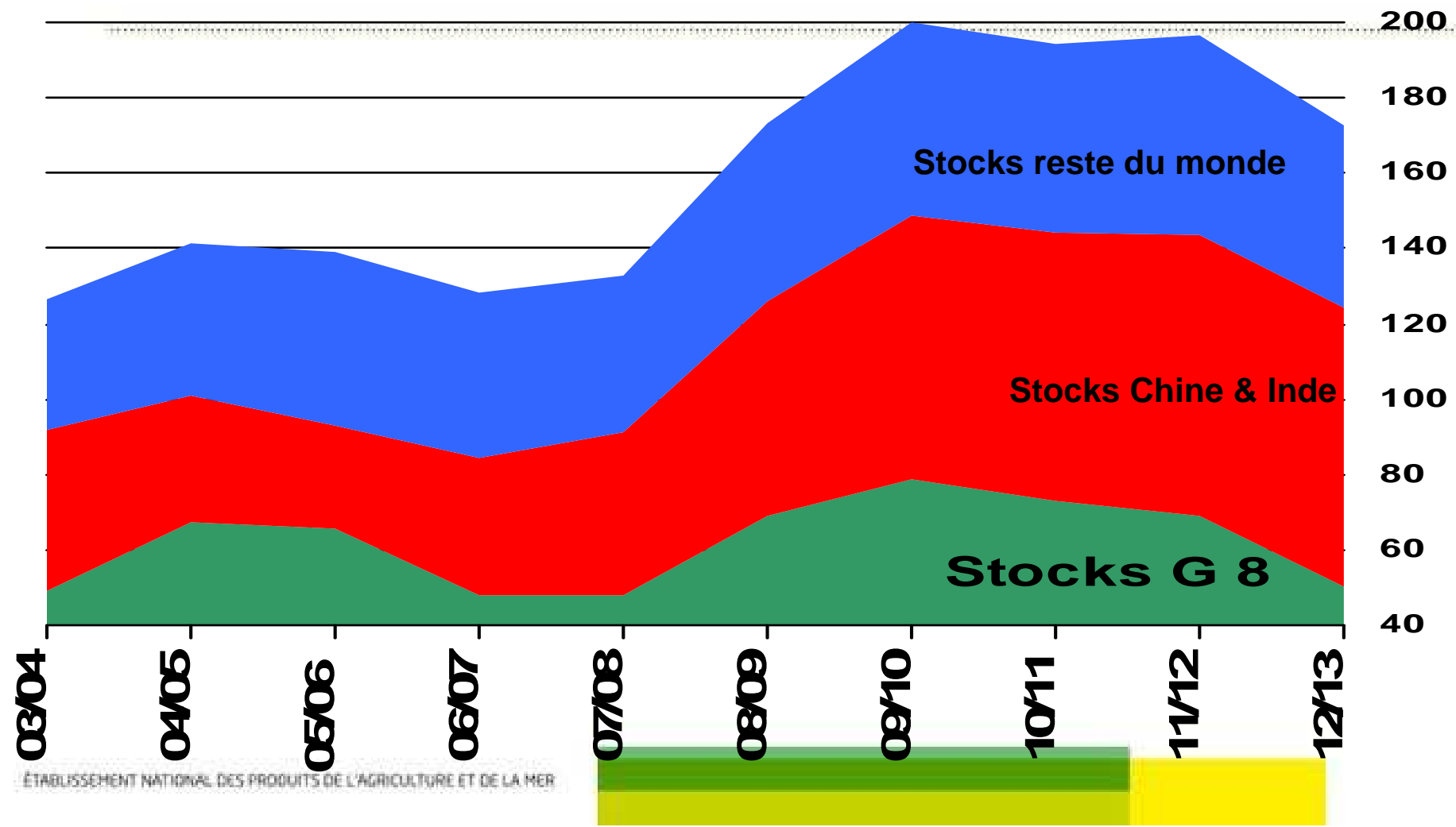
Points clefs

- Semis de maïs perturbés par la pluie en Argentine
- Conditions d'implantation non optimales aux Etats-Unis
- Récolte de maïs UE fortement pénalisées par la canicule en Europe centrale
- Récolte de maïs en retard en France
- Semis d'hiver pénalisés par les pluies

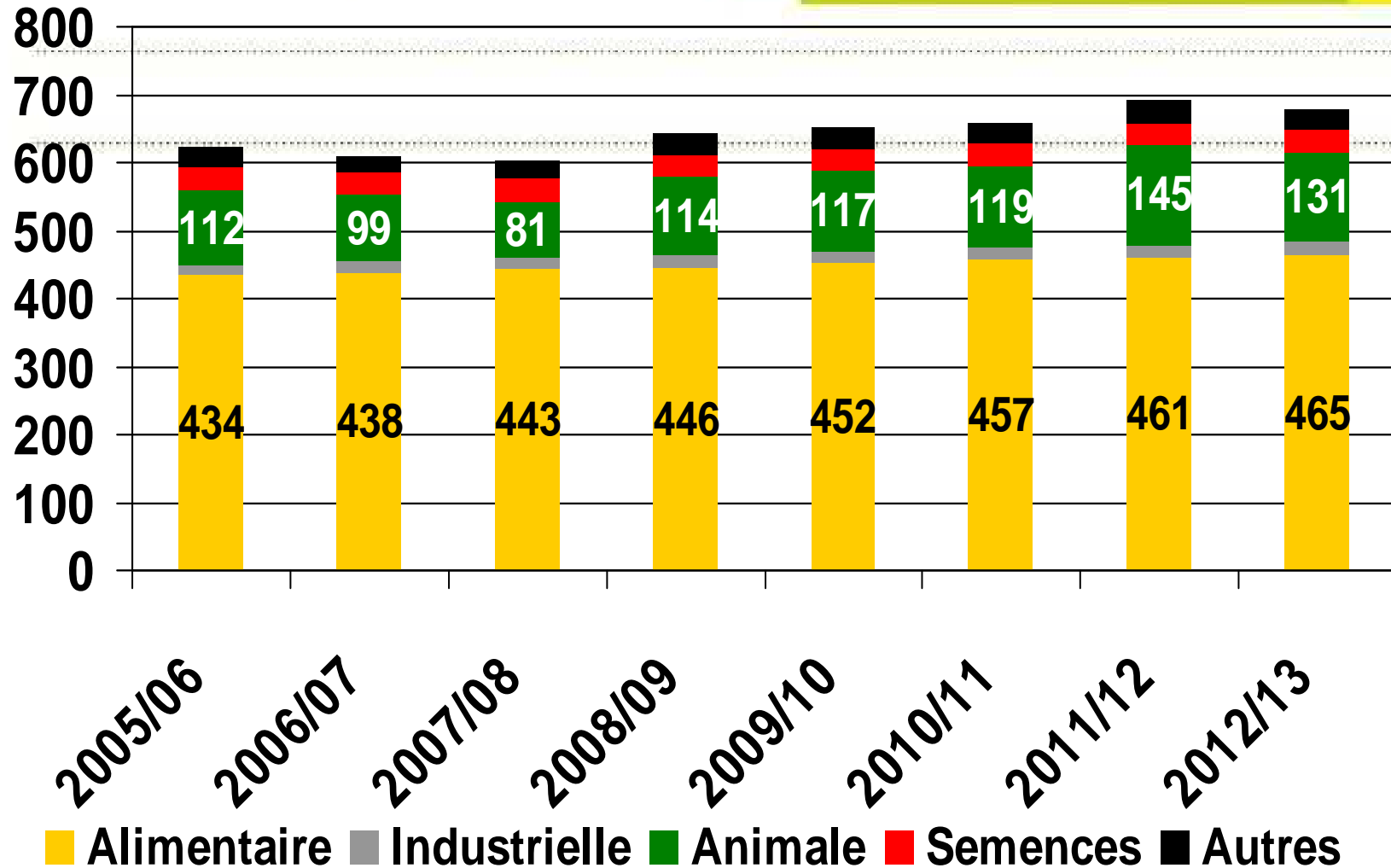
Bilan mondial blé 2012/13 : production, consommation et stocks



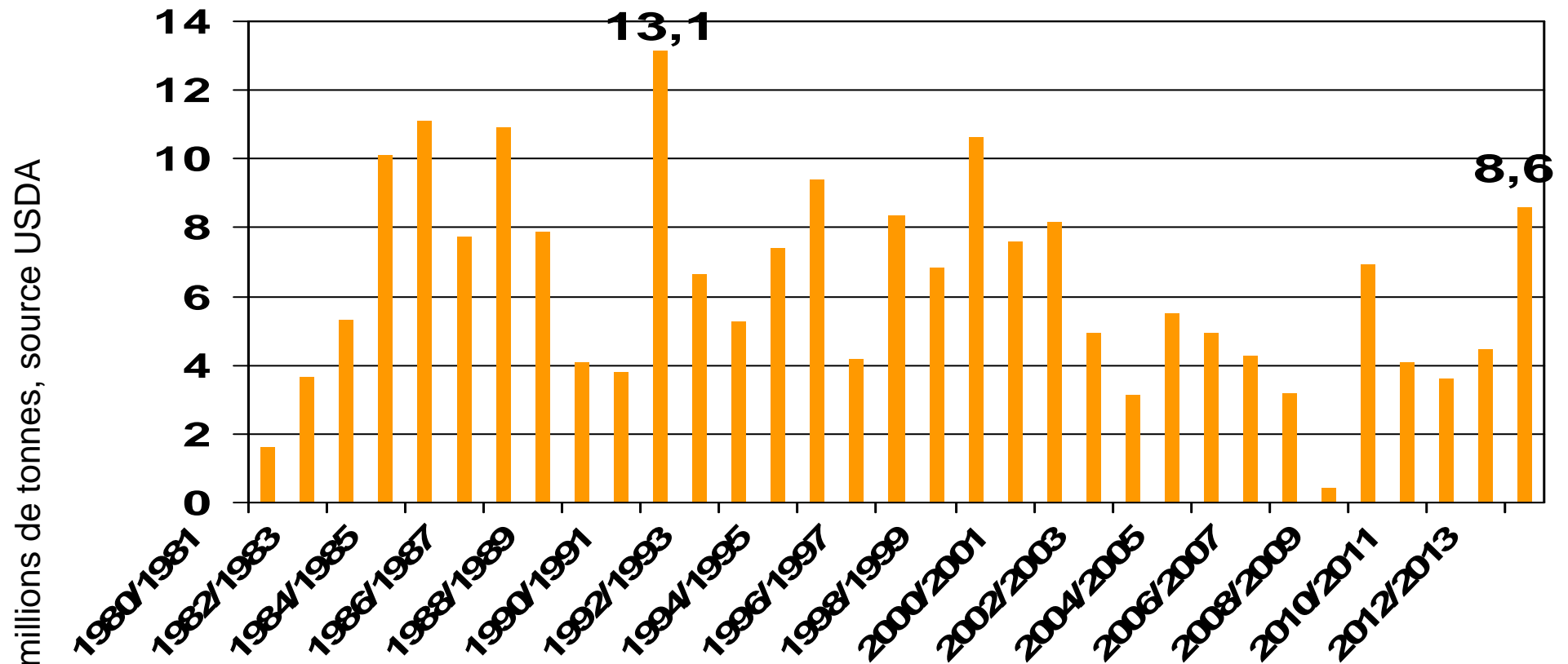
Répartition des stocks mondiaux de blé en 2012/13



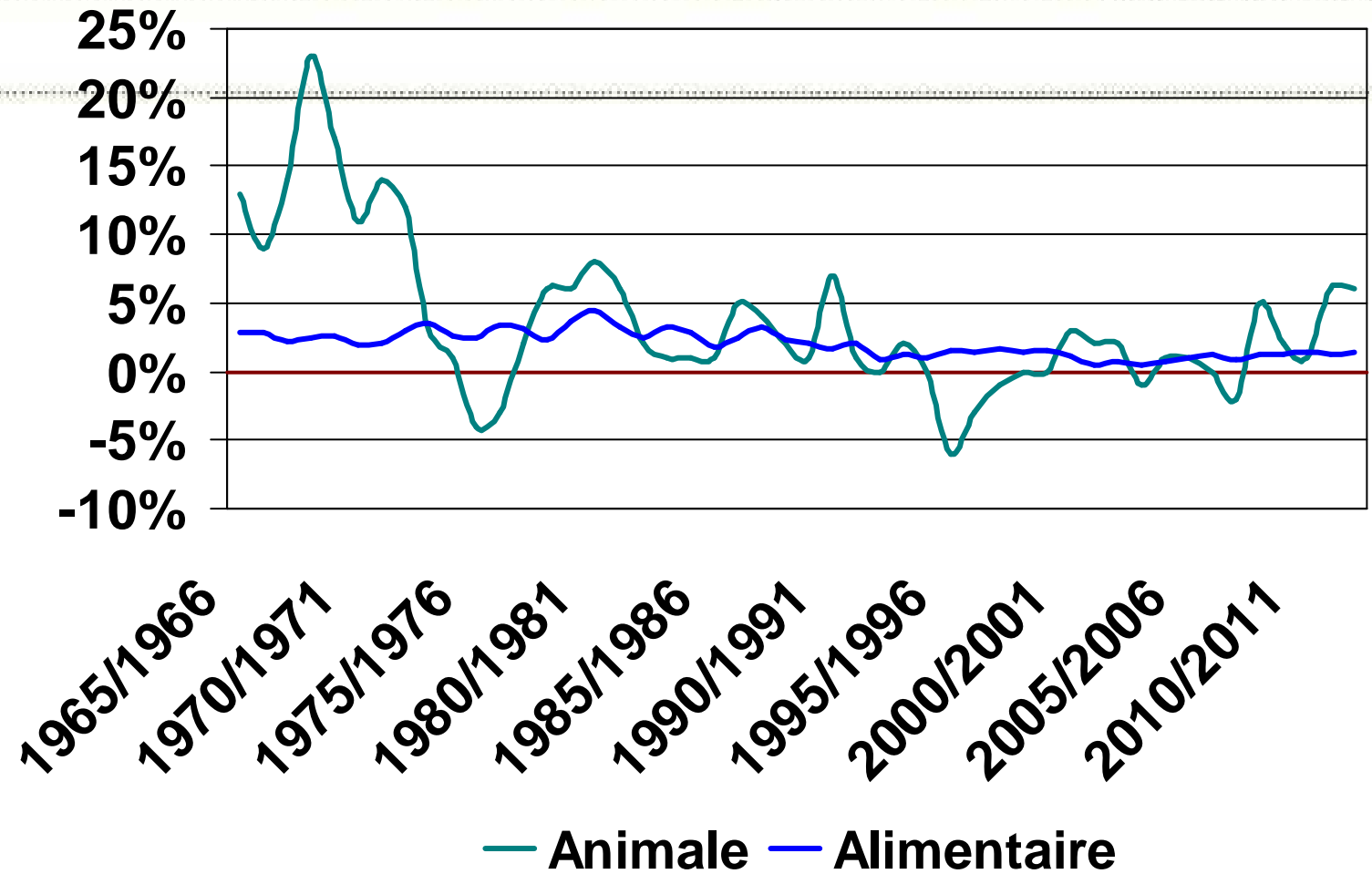
Consommation mondiale de blé



Blé américain : consommation animale



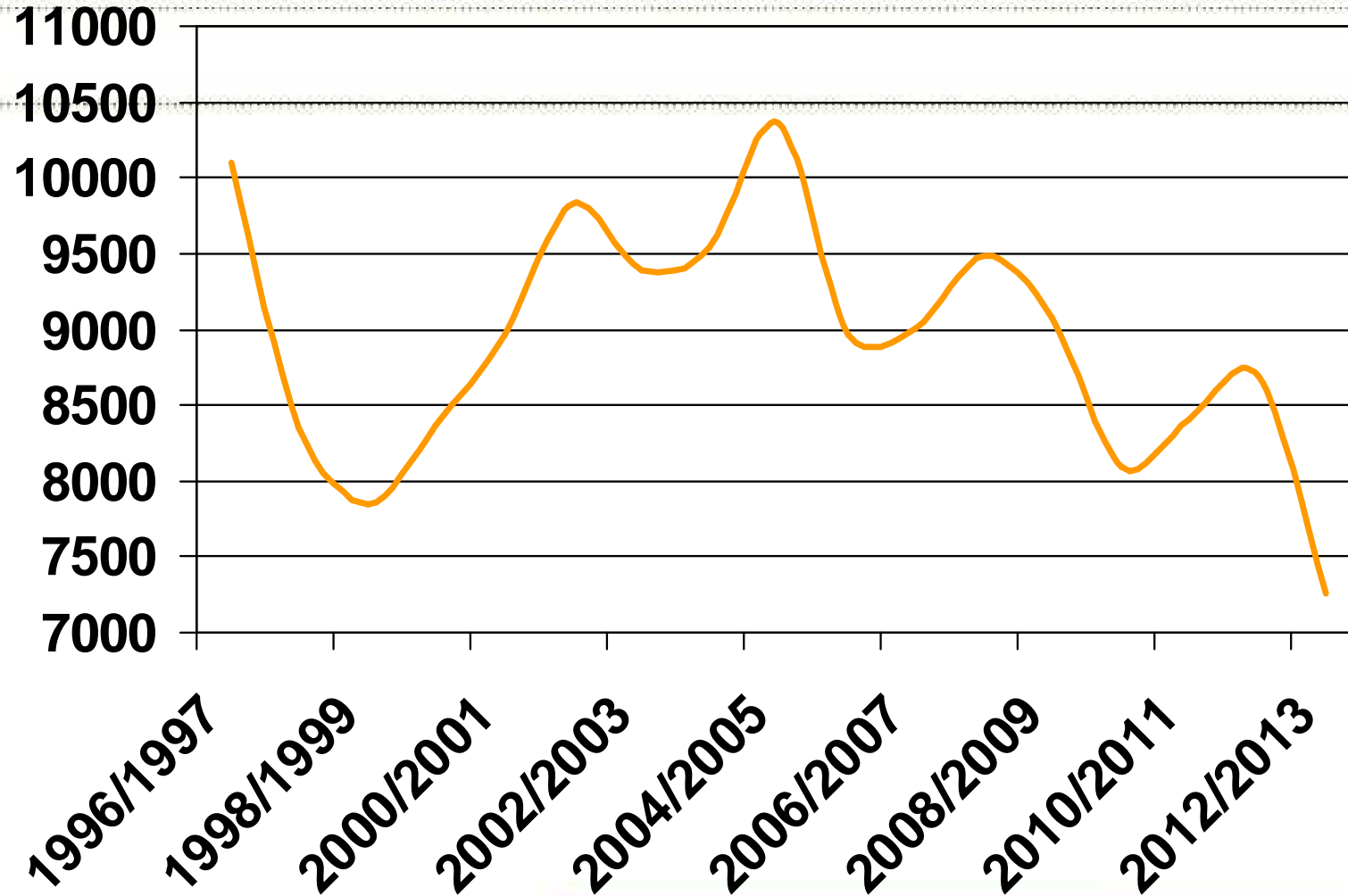
Taux de croissance de la consommation mondiale de blé



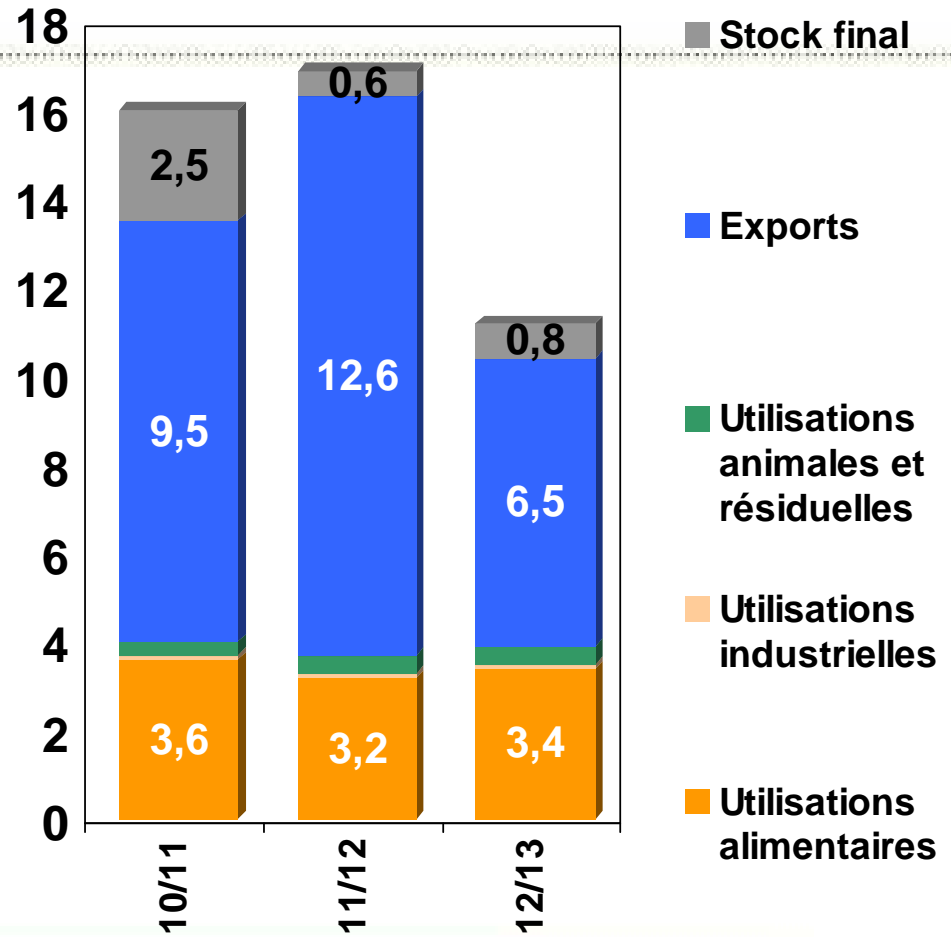
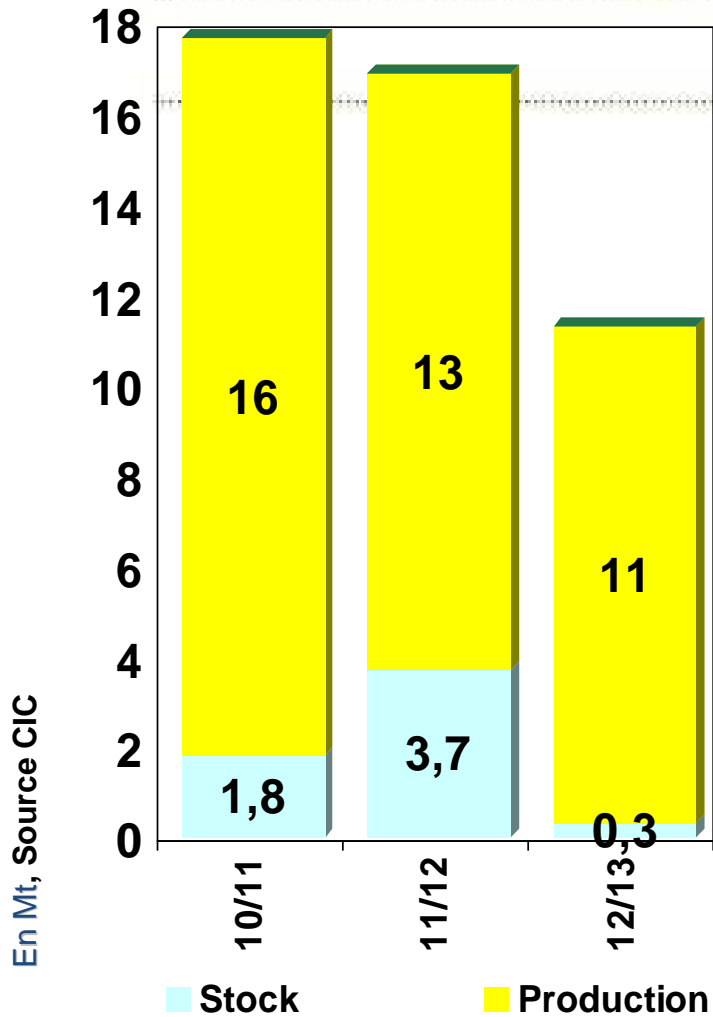


Surfaces dédiées au blé Mercosur

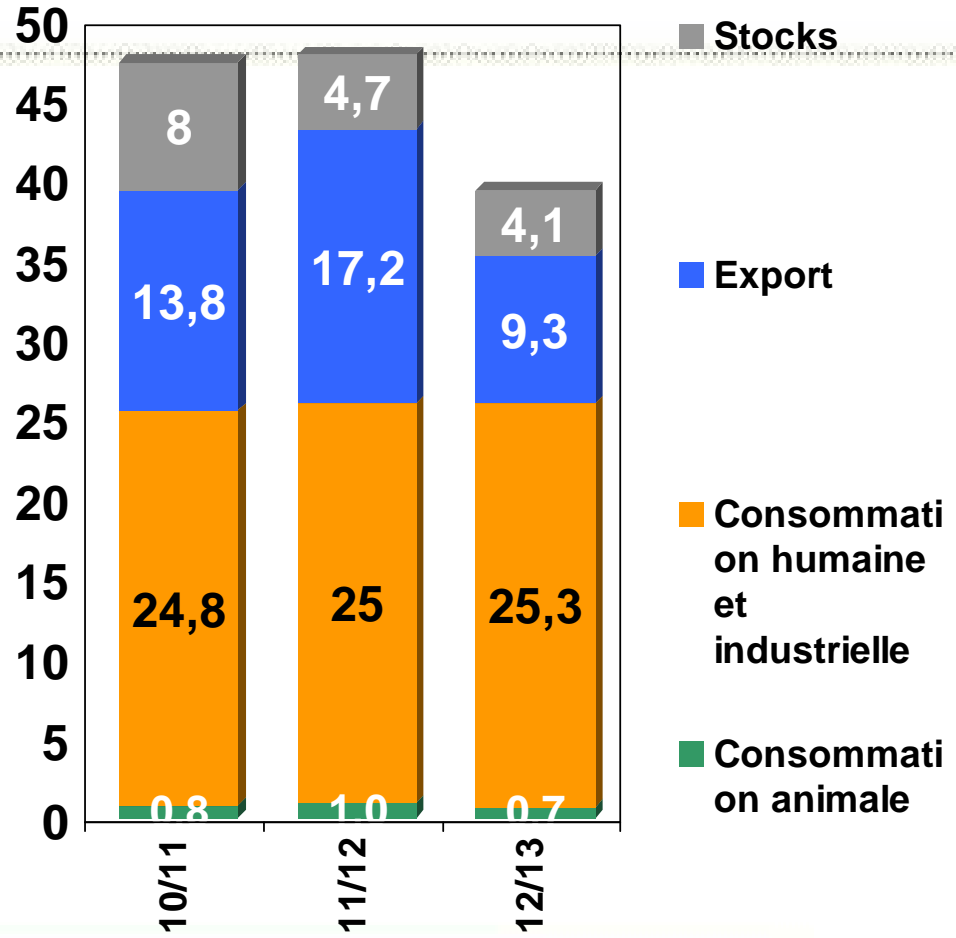
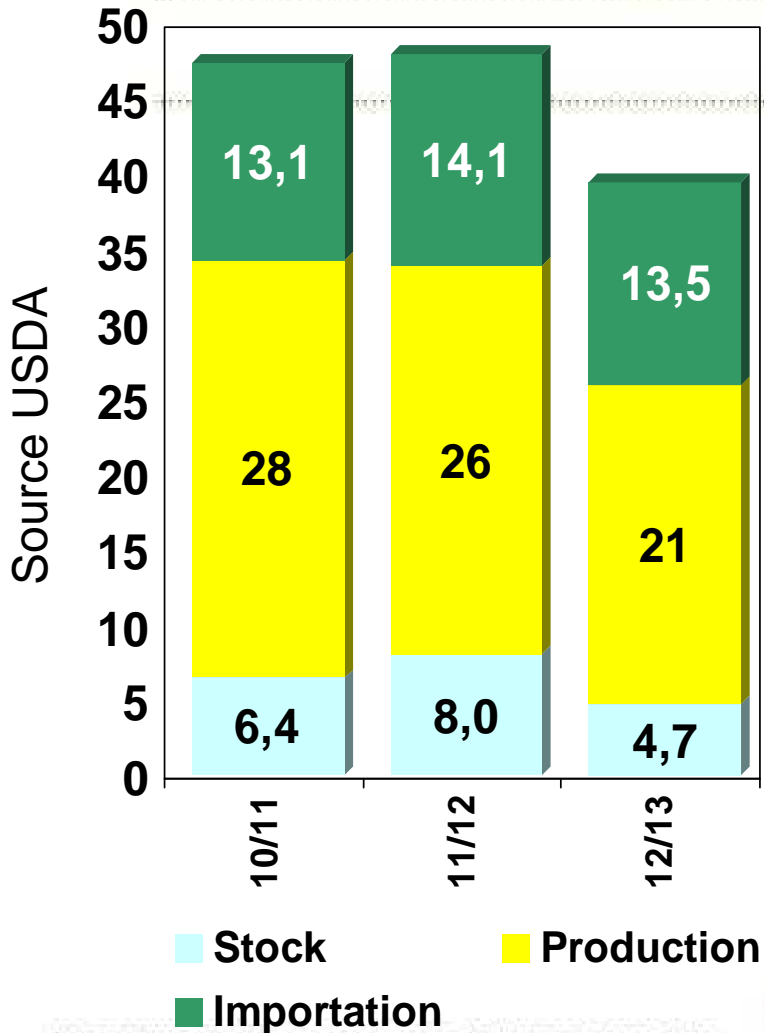
En 1 000 ha, source : USDA



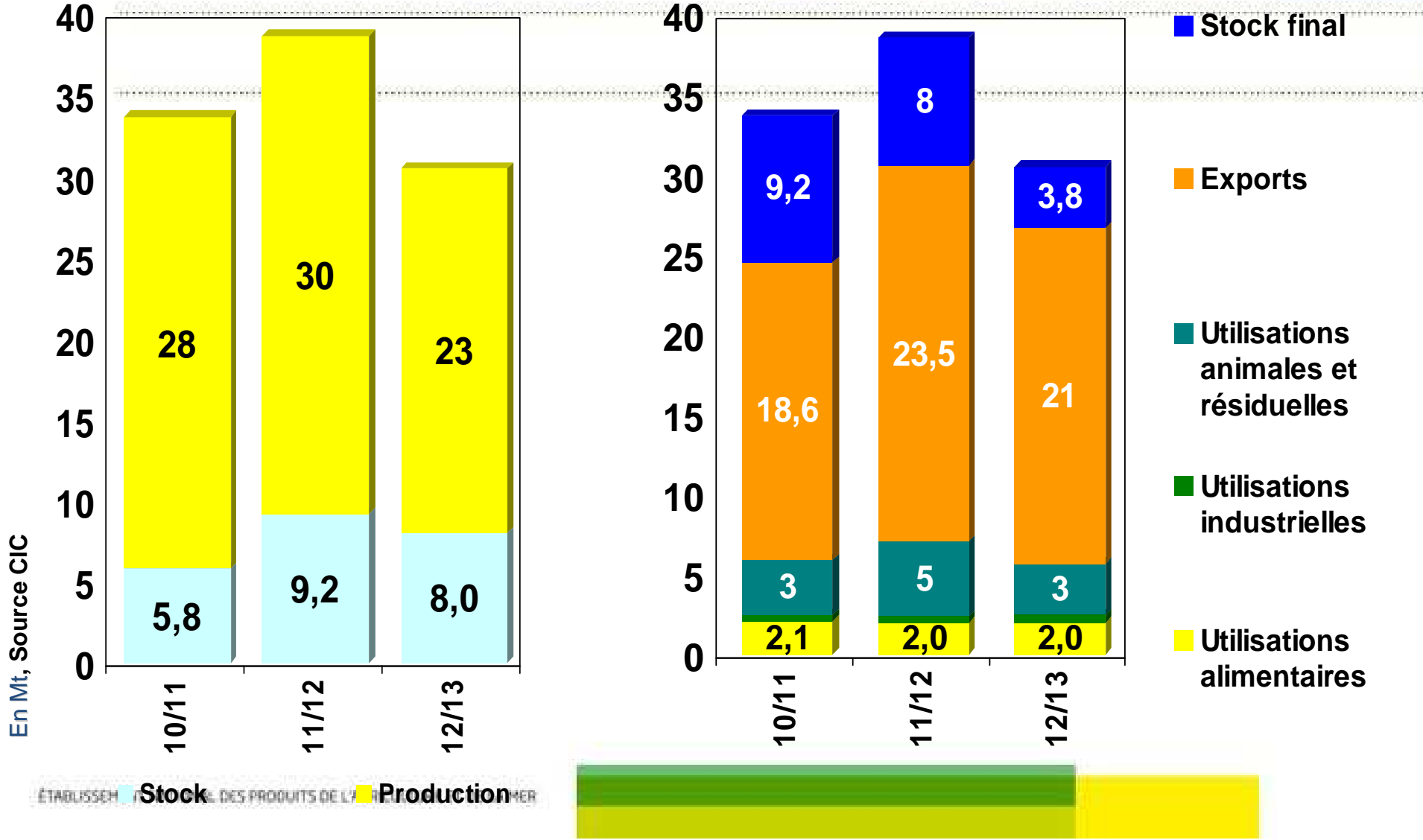
Argentine : bilan blé



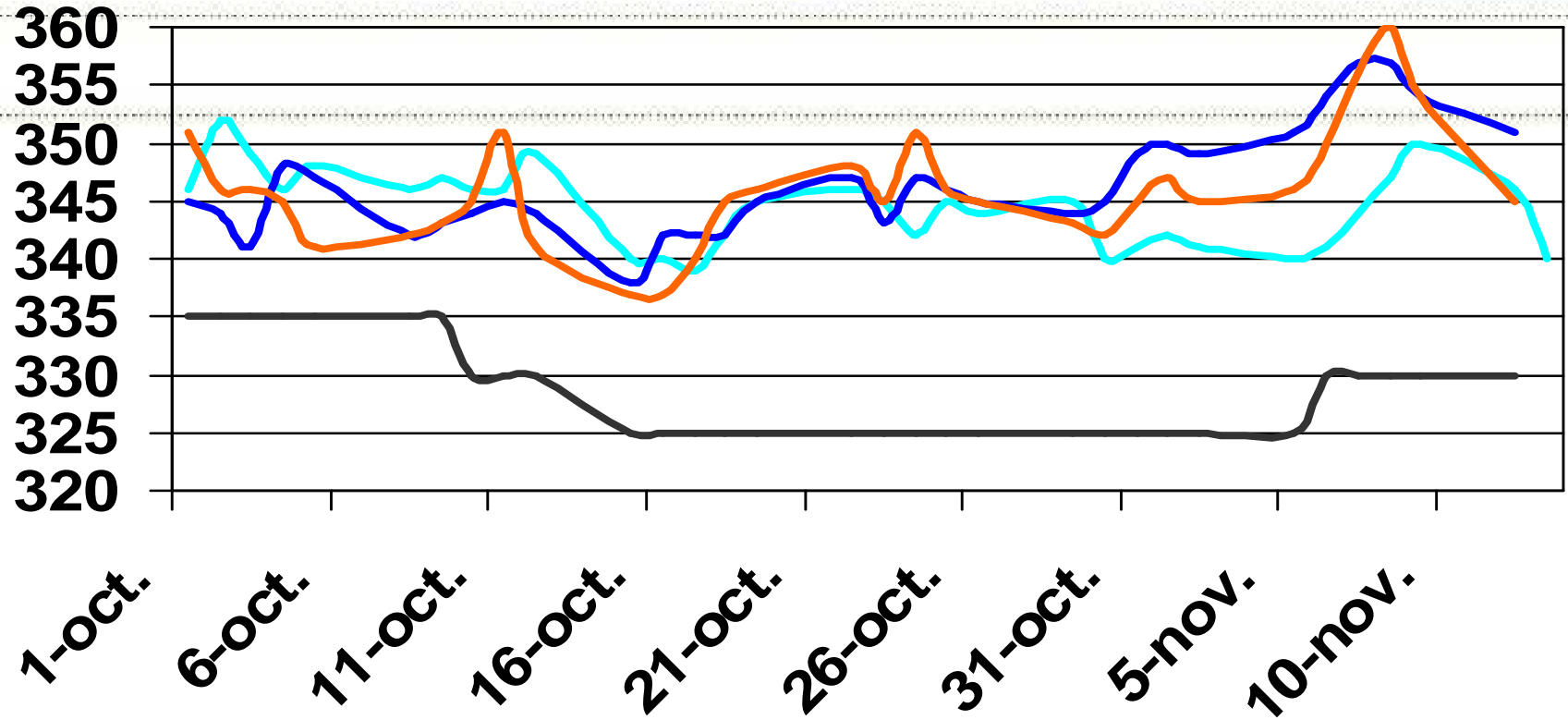
Bilan blé Amérique du Sud



Australie : bilan blé



Cours du blé

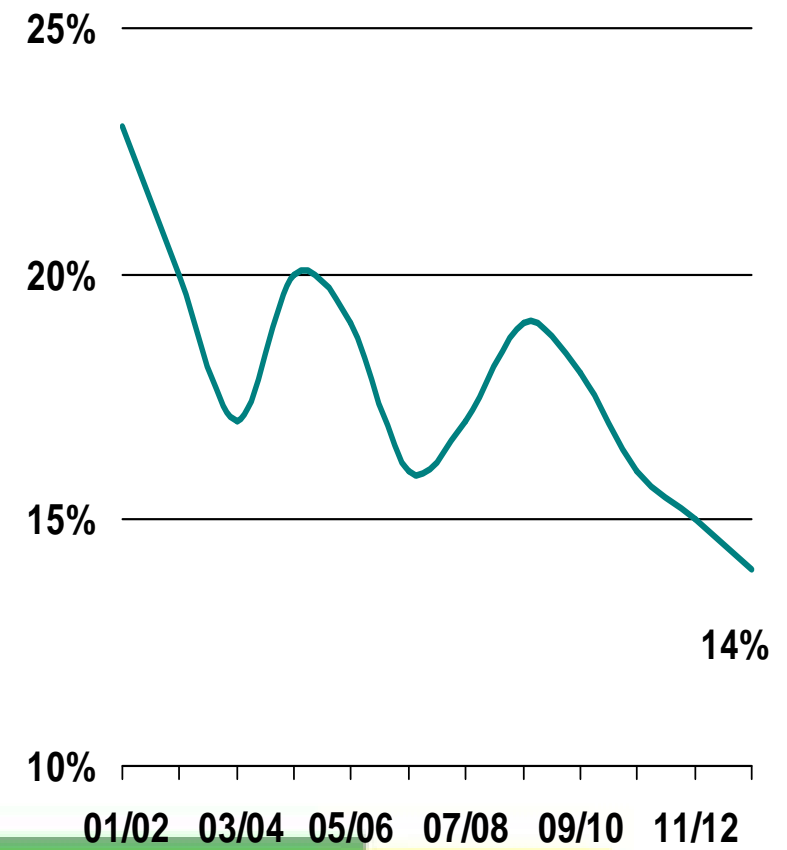
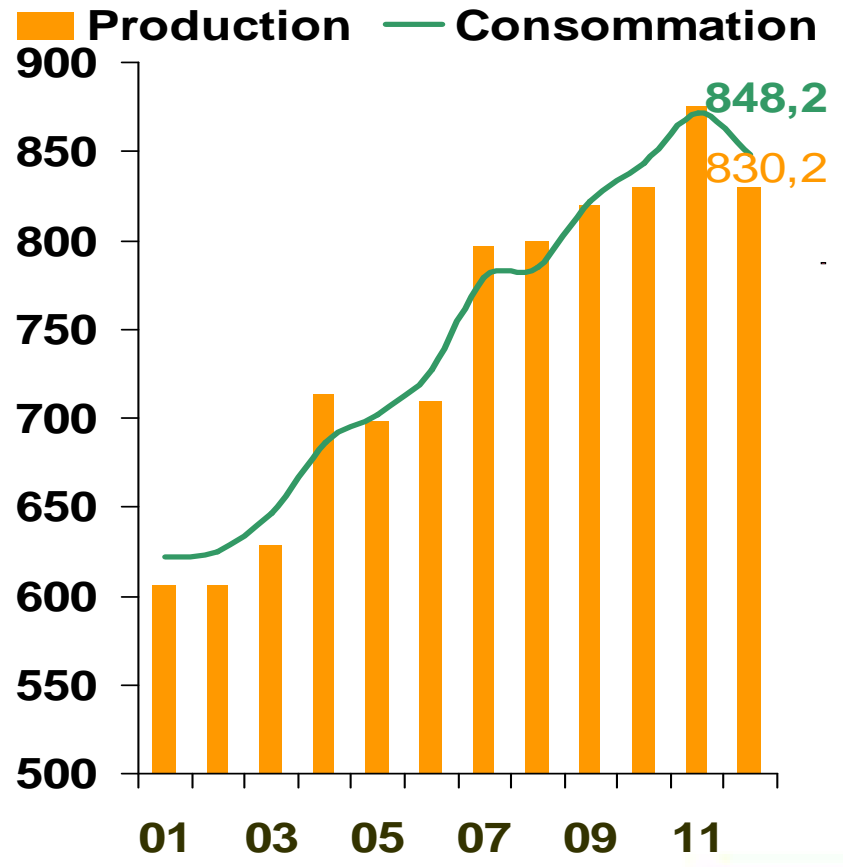


- Blé blanc Australie orientale
- Fob Rouen
- Fourrager mer Noire
- SRW fob



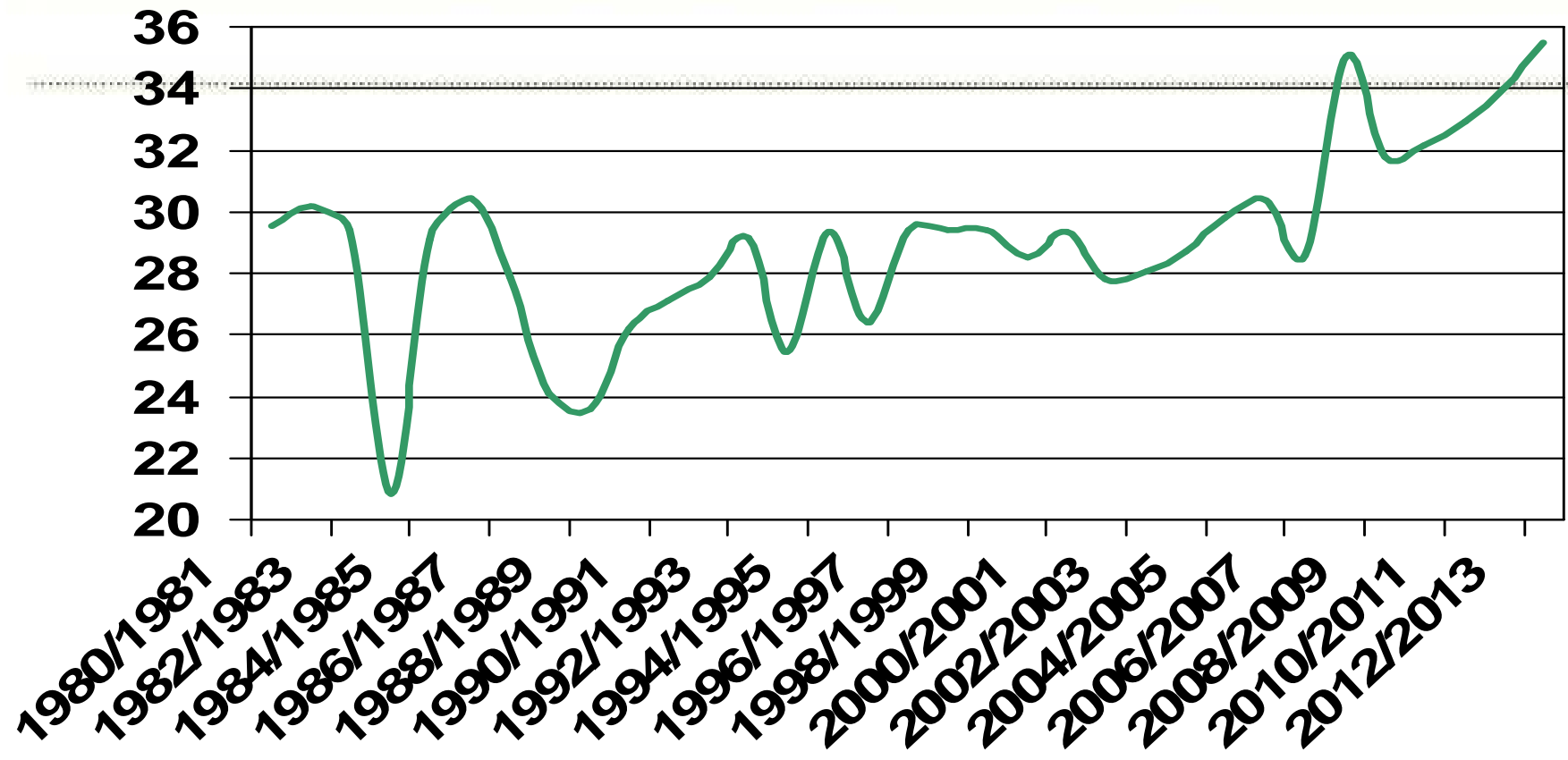
Bilan mondial maïs 2012/13

Ratio stock sur consommation

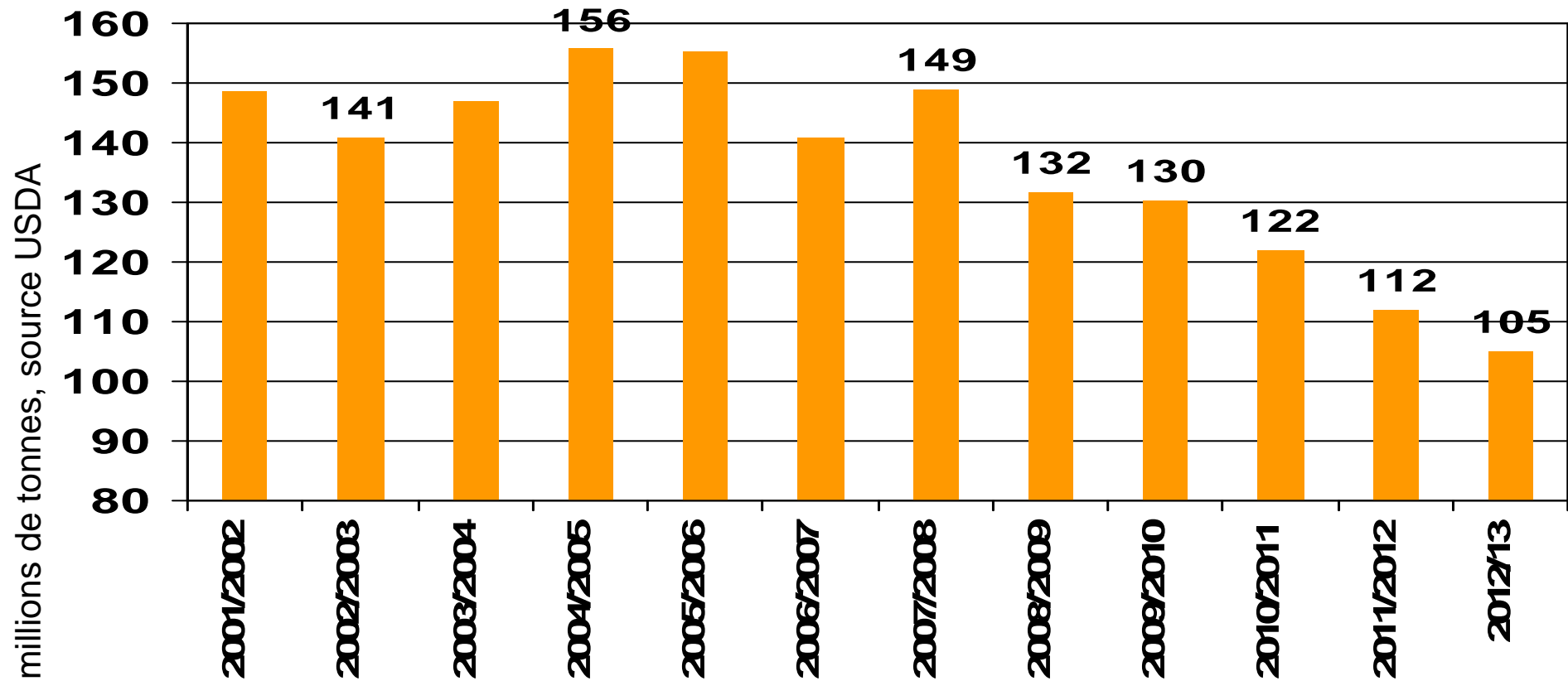


Surfaces de maïs récoltées aux Etats Unis

En Mha, source USDA

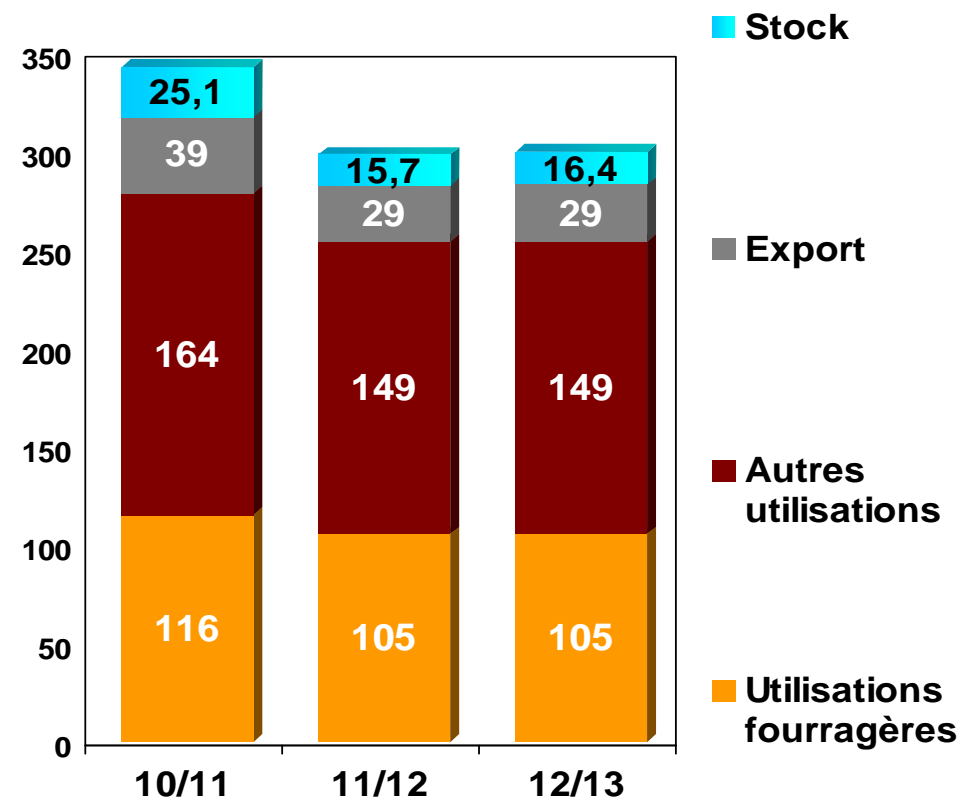
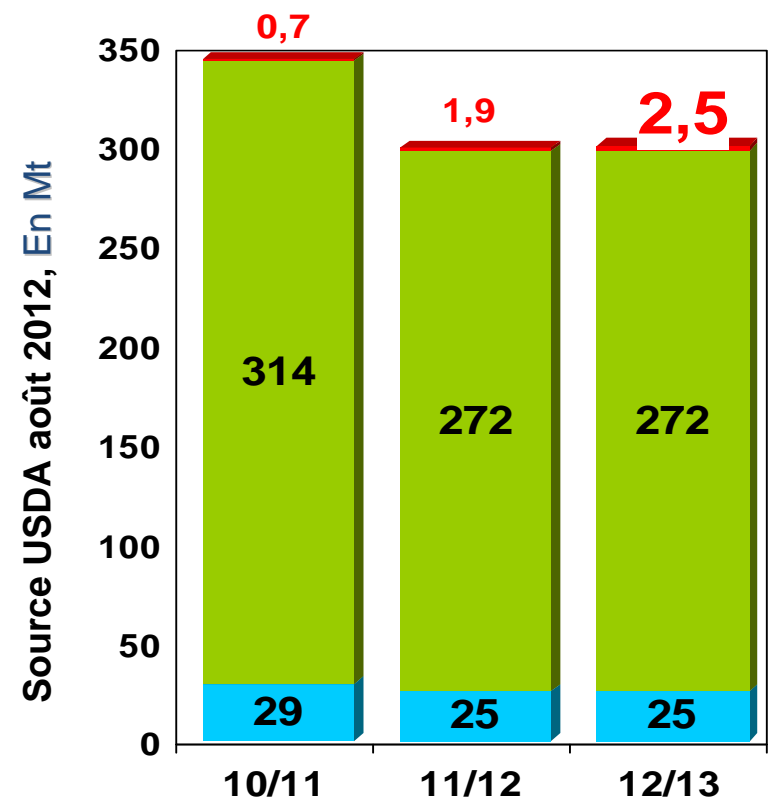


Mais américain : consommation animale



Etats-Unis, bilan maïs 2012/13 : un stock attendu de l'ordre de 16 Mt

■ Stock initial ■ Production ■ Import



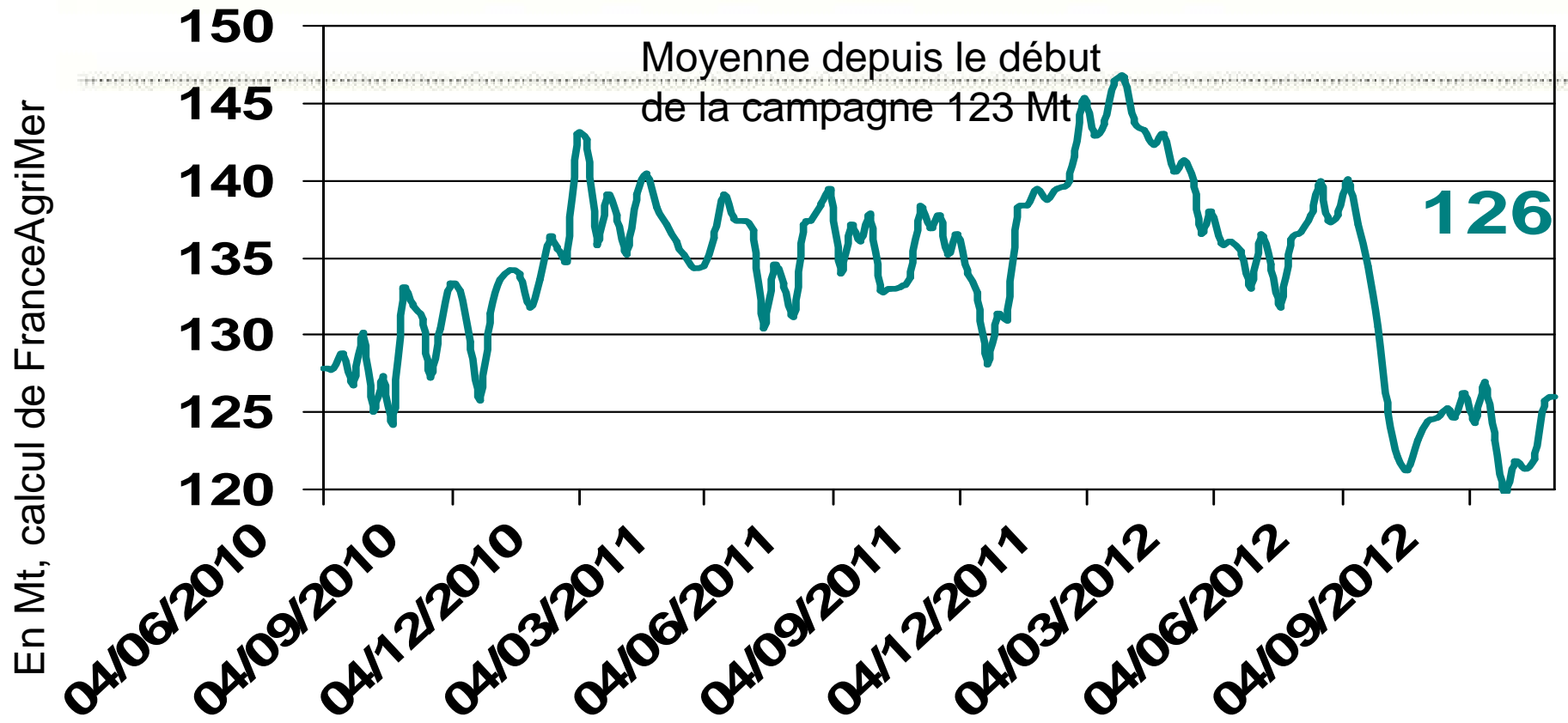
Production d'éthanol et consommation de maïs

- Volume d'éthanol produit et tonnage de maïs utilisé
- **1 boisseau de maïs => 2,8 gallons d'éthanol**
- Sachant que : 1 boisseau US de maïs vaut 0,02540 tonne (25,4 kg)
- 1 gallon = 3,78541178 litres donc 2,8 gallons = 10,599 litres
- On a l'équivalence : 25,4 kg de maïs => 10,599 litres d'éthanol
-
- **2,40 kg de maïs => 1 litre d'éthanol**
- 240 000 tonnes de maïs => 1 Mhl d'éthanol ou encore **0,24 Mt maïs = 1Mhl éthanol**



FranceAgriMer

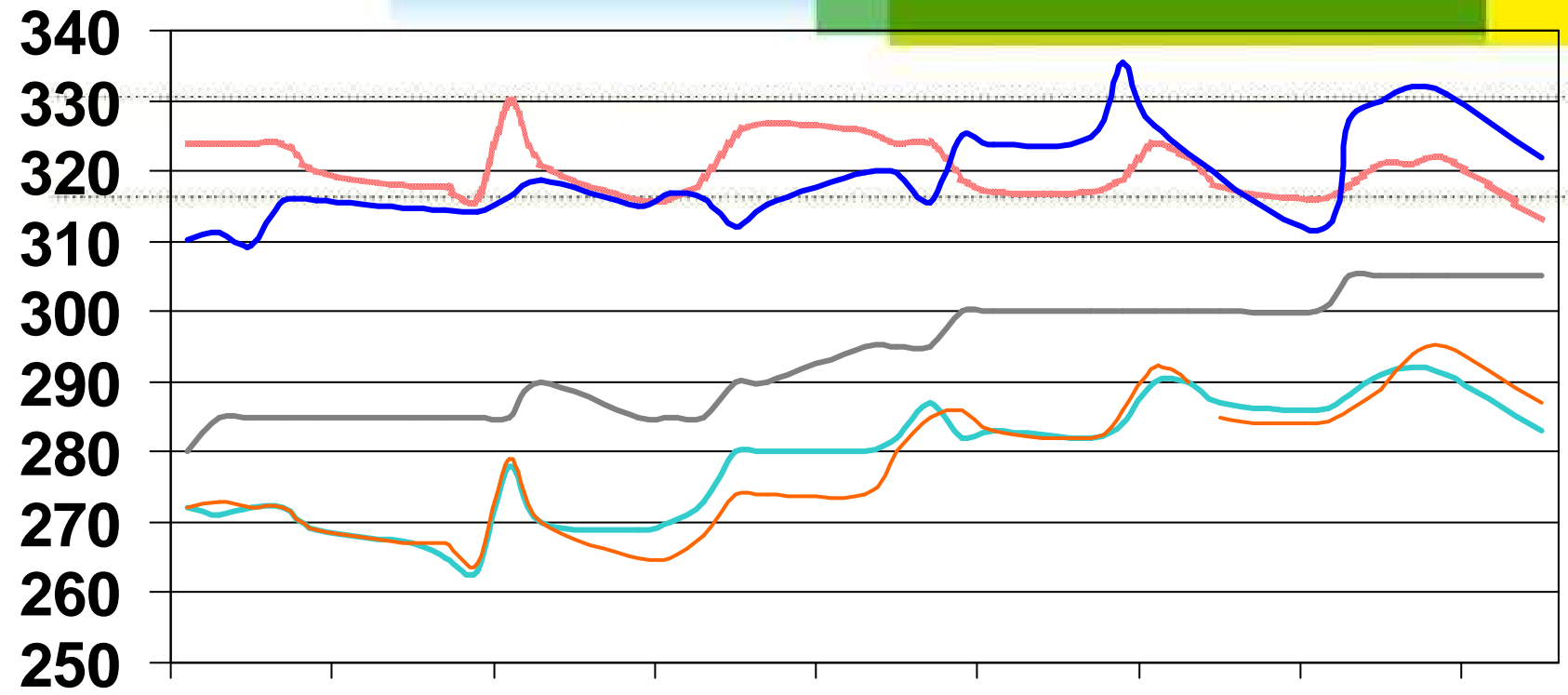
Equivalent tonnage annuel de maïs de la production hebdomadaire d'éthanol aux Etats-Unis



Cône Sud : situation des semis

- Précipitations abondantes fin octobre avec environ 7 MHa sous les eaux et des conséquences sur les semis :
- Maïs : Début nov. 40% des surfaces semées contre 57% l'an dernier. Si les retards persistent la surface de maïs pourrait baisser à 3 Mha soit une production de 21-22MT (selon la Bolsa de Buenos Aires)
- Soja : Début nov. 4% des surfaces semées contre 13% l'an dernier

Cours du maïs

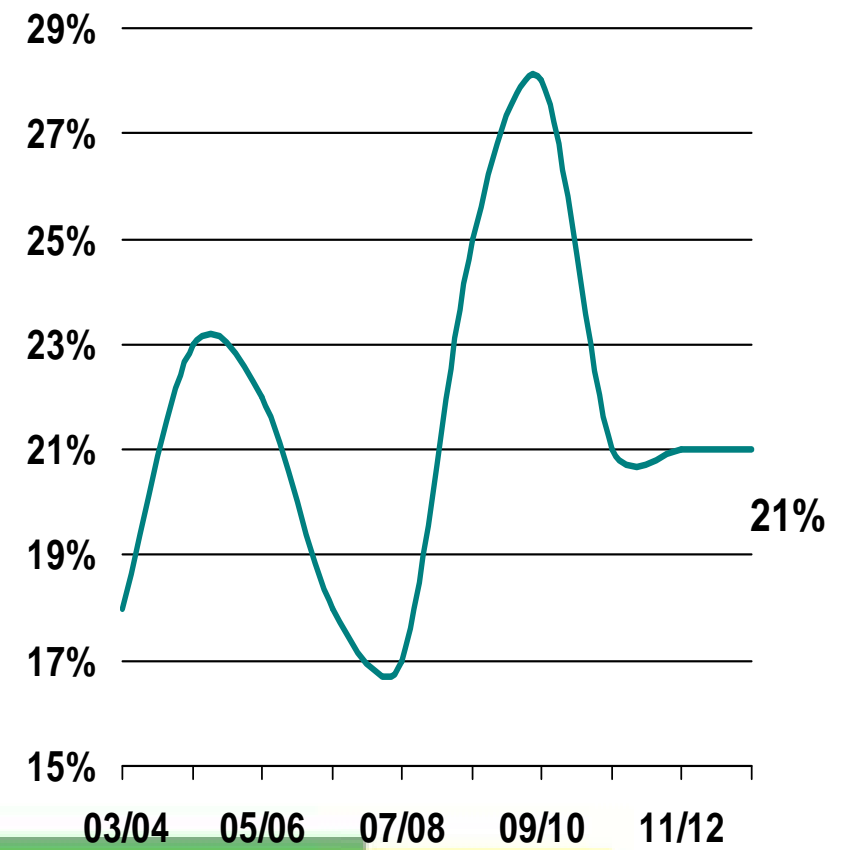
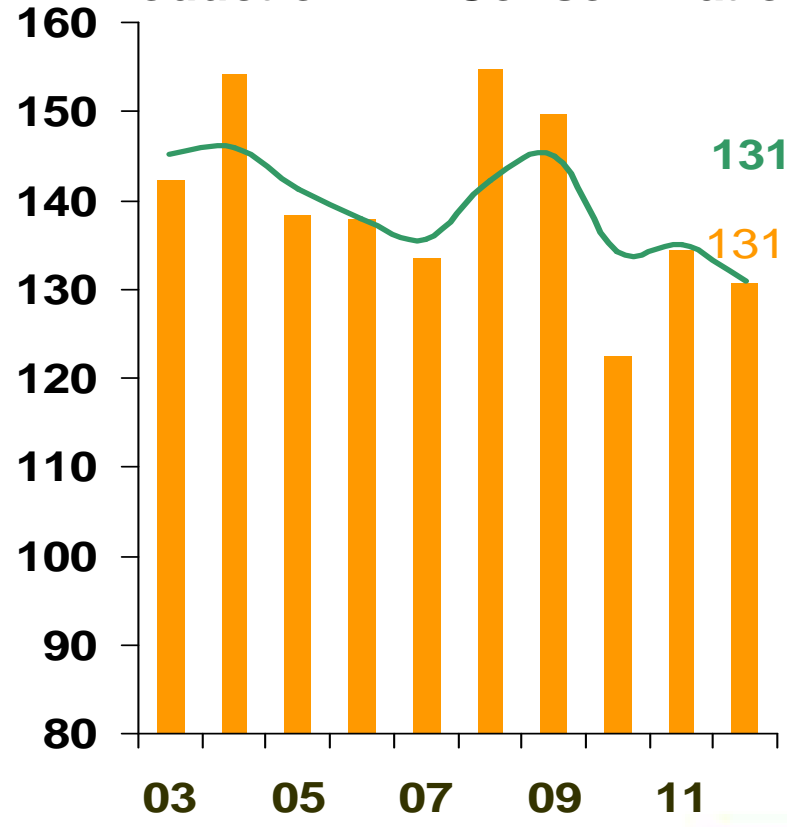


- Argentina Feed Up River — Black Sea Feed — Brazil feed Paranaguá
- US 3YC Gulf — Fob Bordeaux

Bilan mondial orge 2012/13

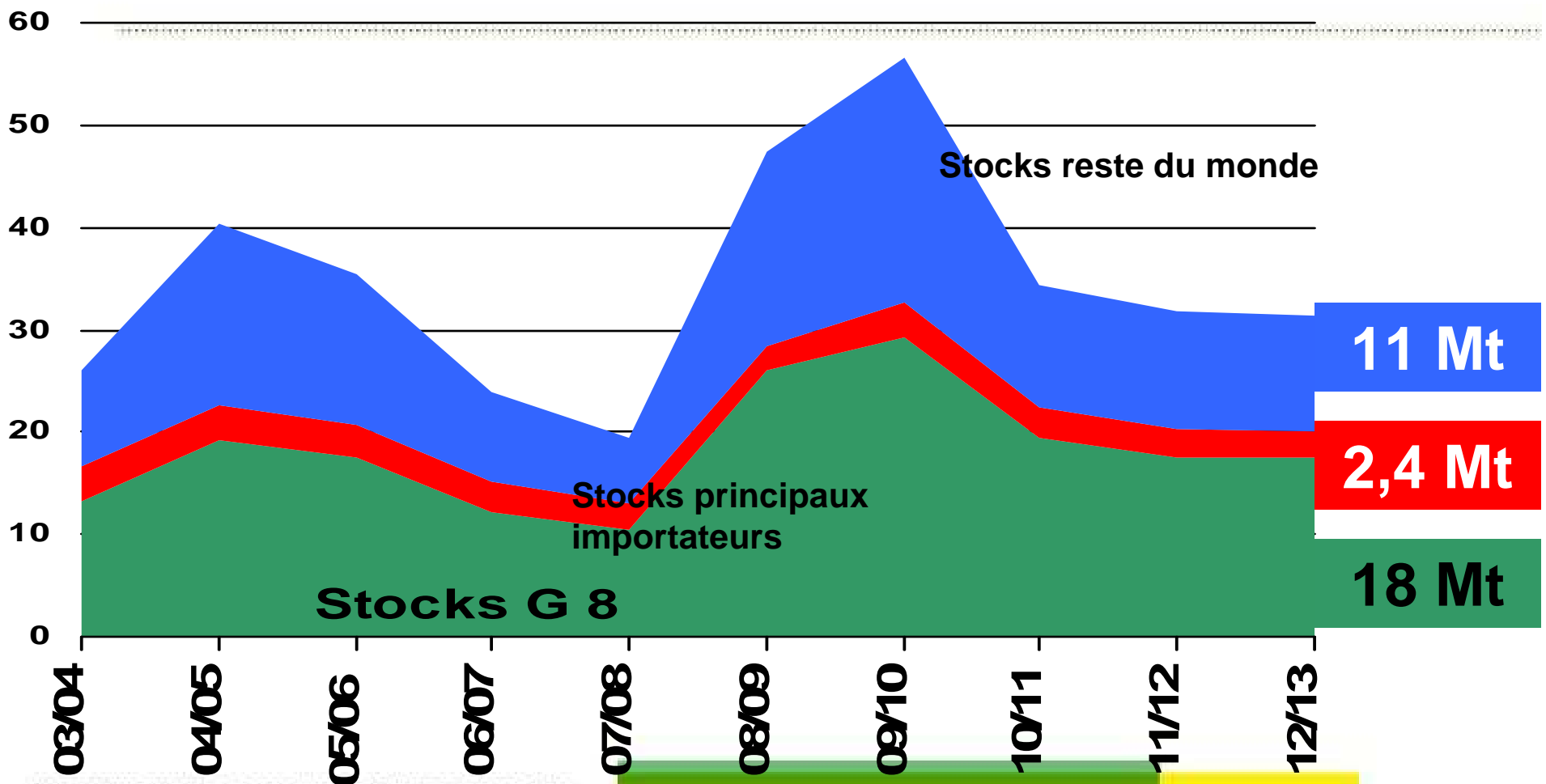
Ratio stock sur consommation

Production — **Consommation**

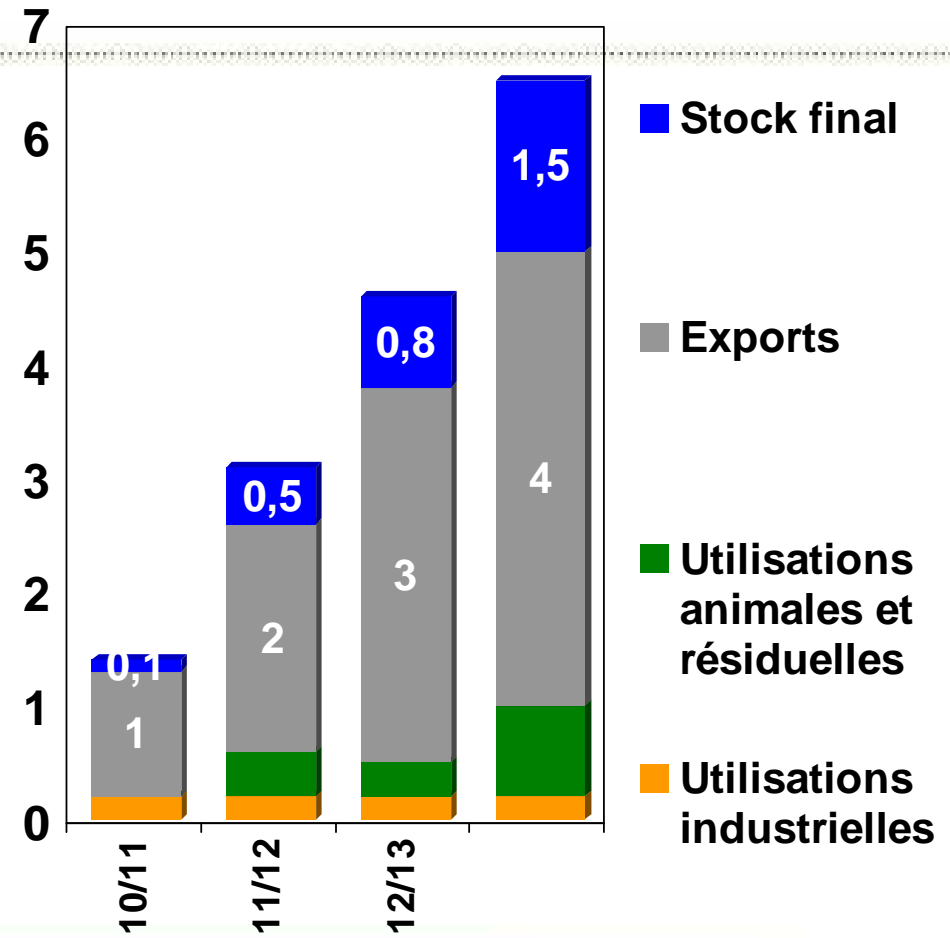
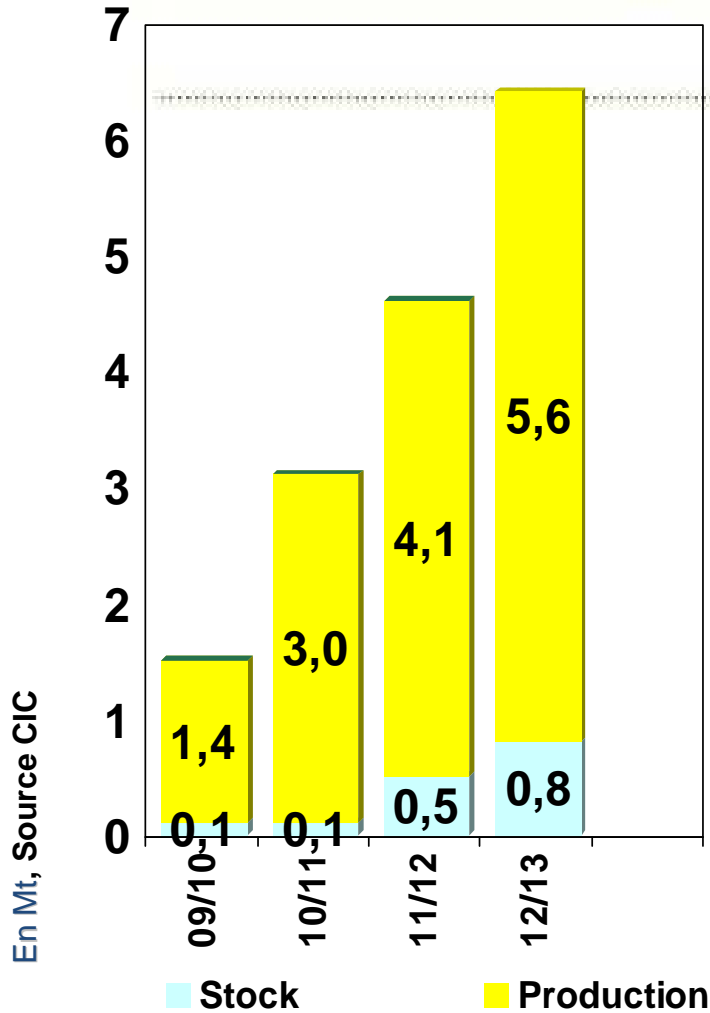


Répartition des stocks mondiaux d'orge en 2012/13

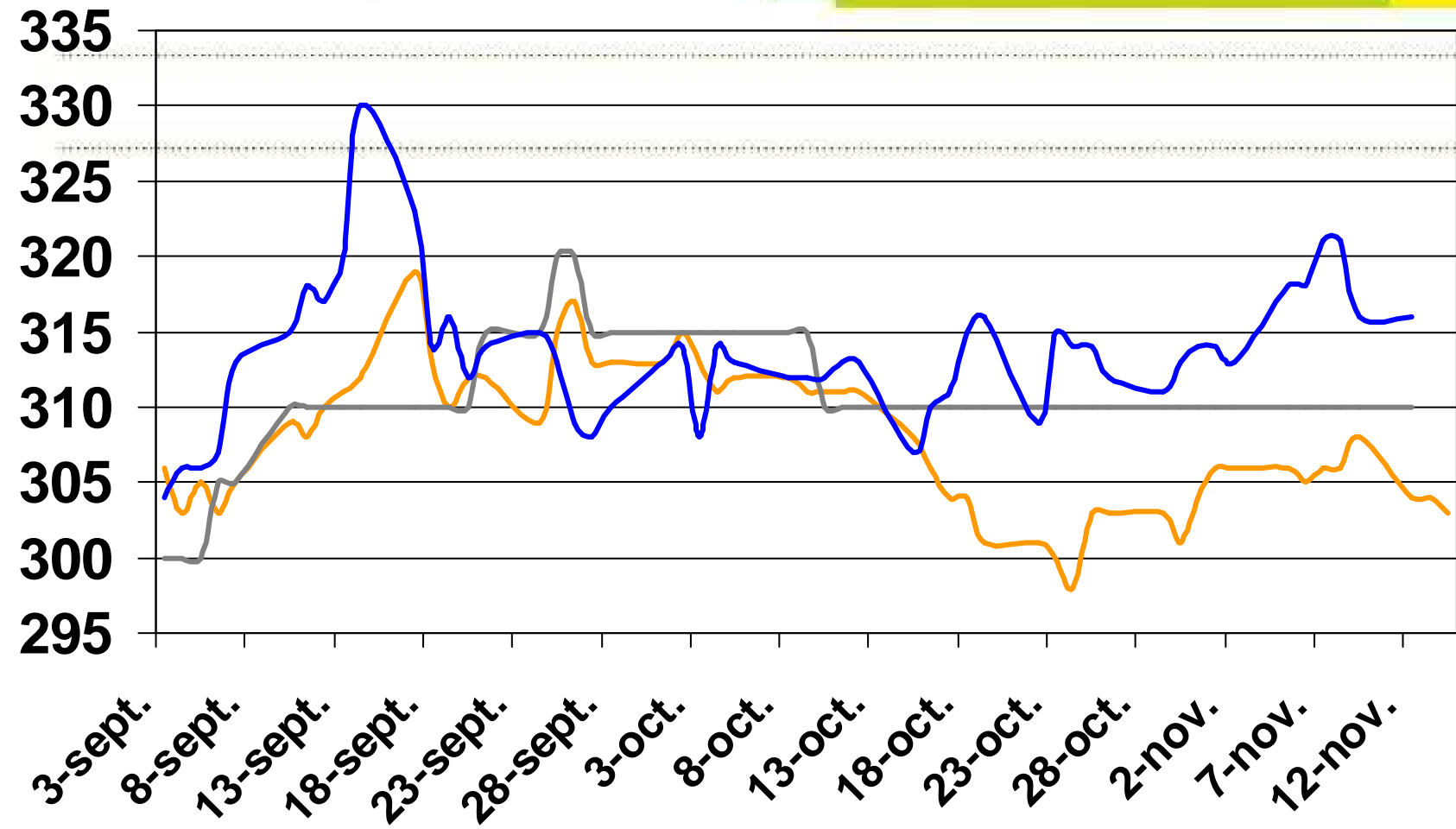
En Mt, Source CIC



Argentine : bilan orge



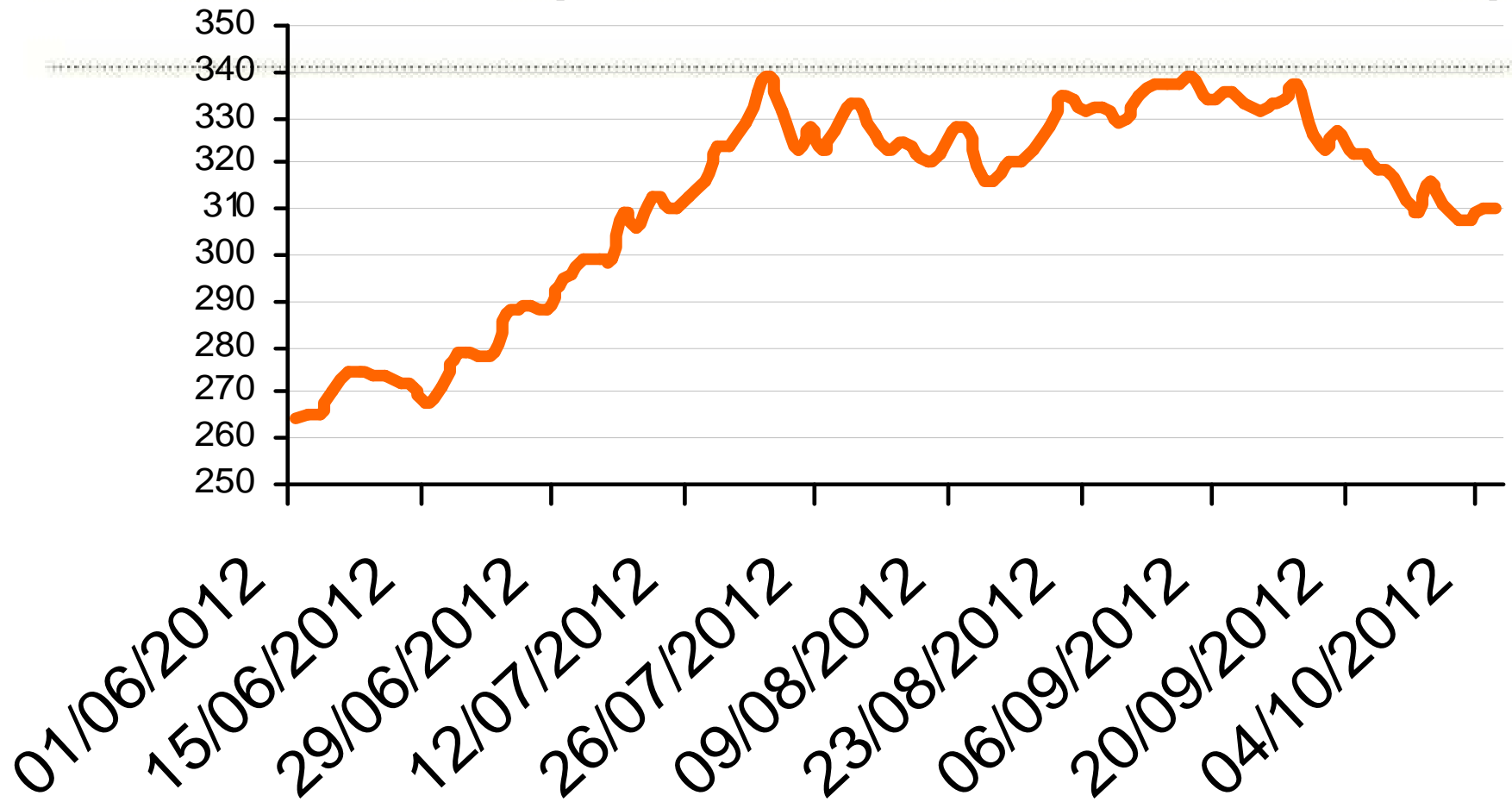
Cours de l'orge



— Australia Feed Eastern States — Black Sea Feed — France Feed Rouen

Indice CIC - GOI (Grains and Oilseeds Index)

Source : CIC-indice 100 janvier 2000



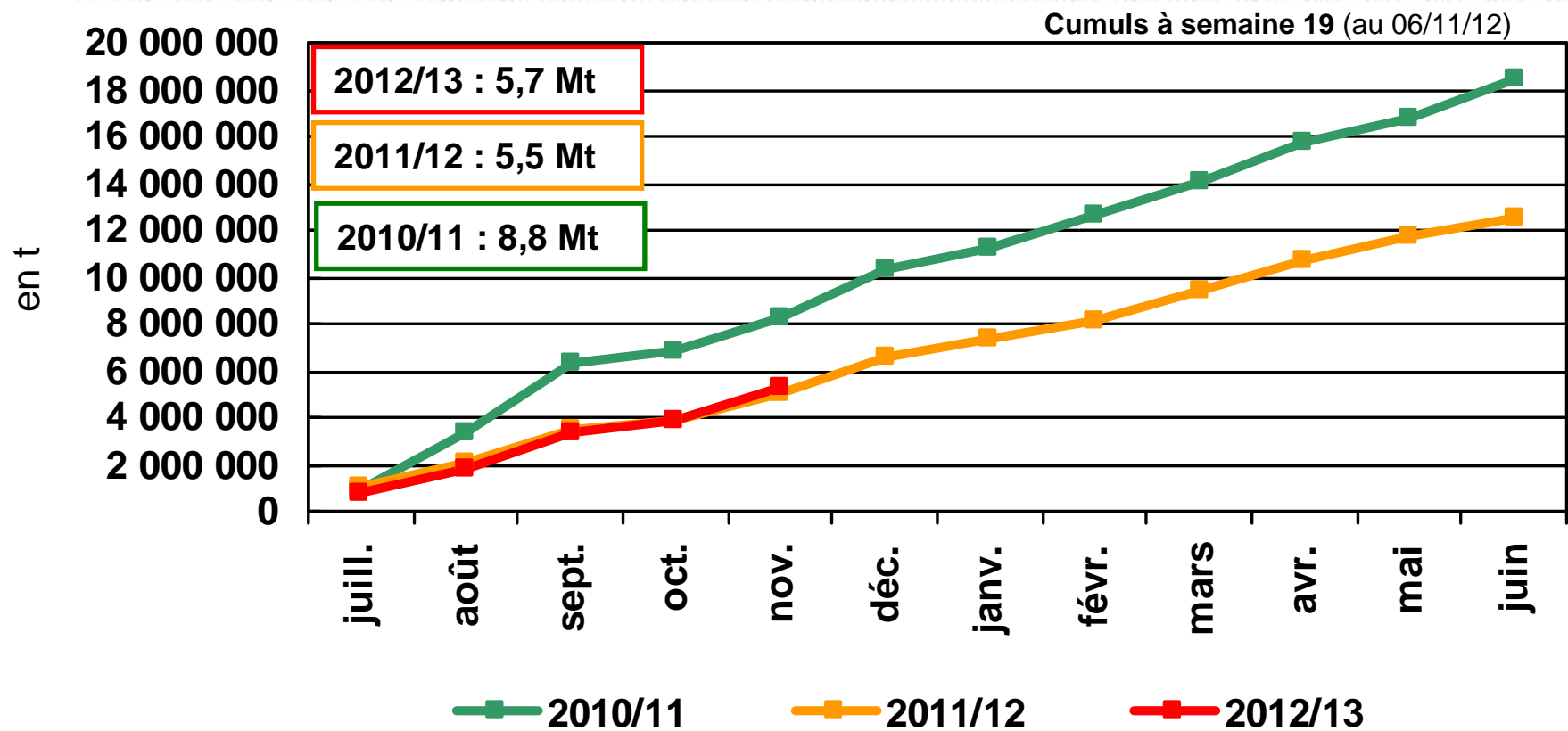


FranceAgriMer



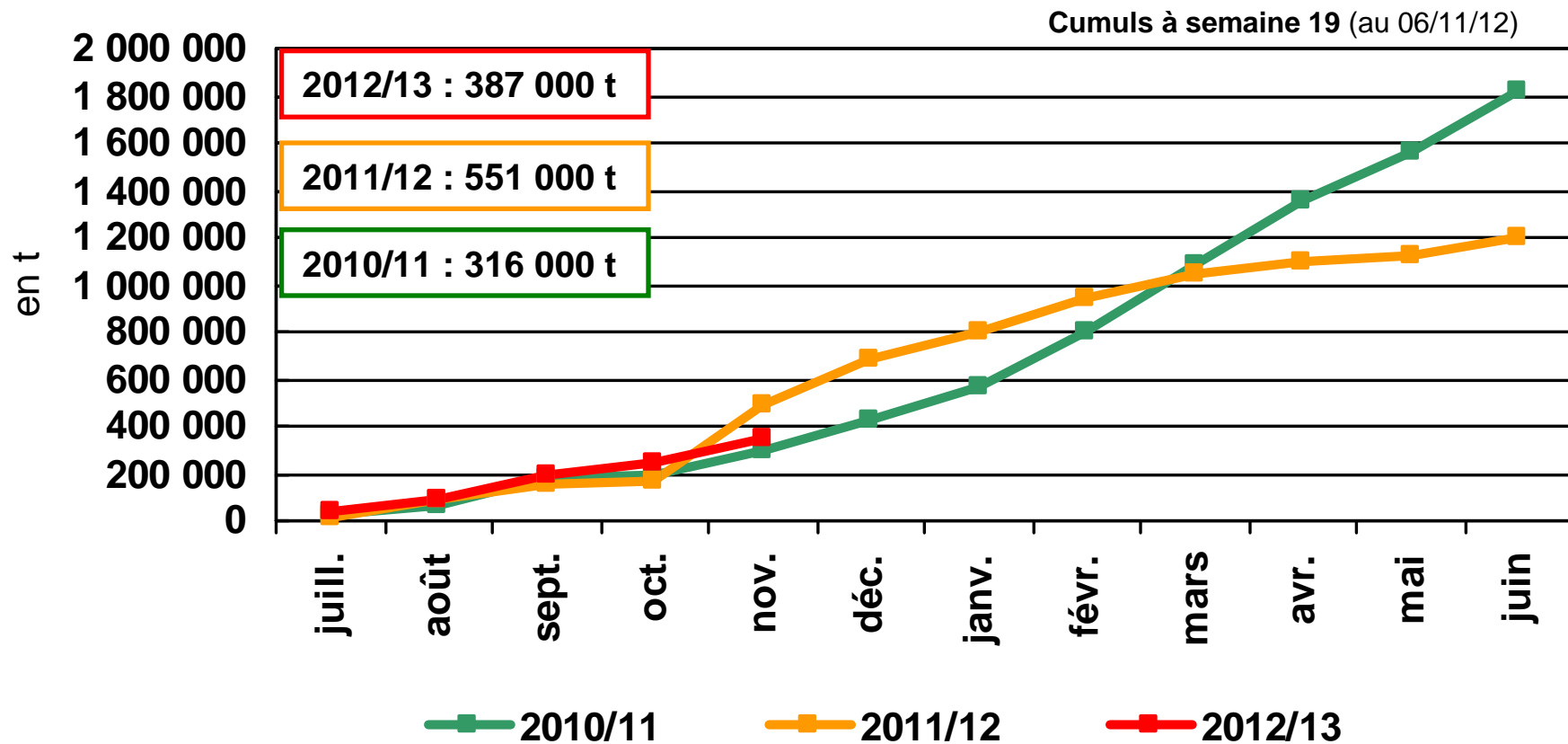
Marché européen

Blé tendre : certificats à l'exportation délivrés dans l'UE



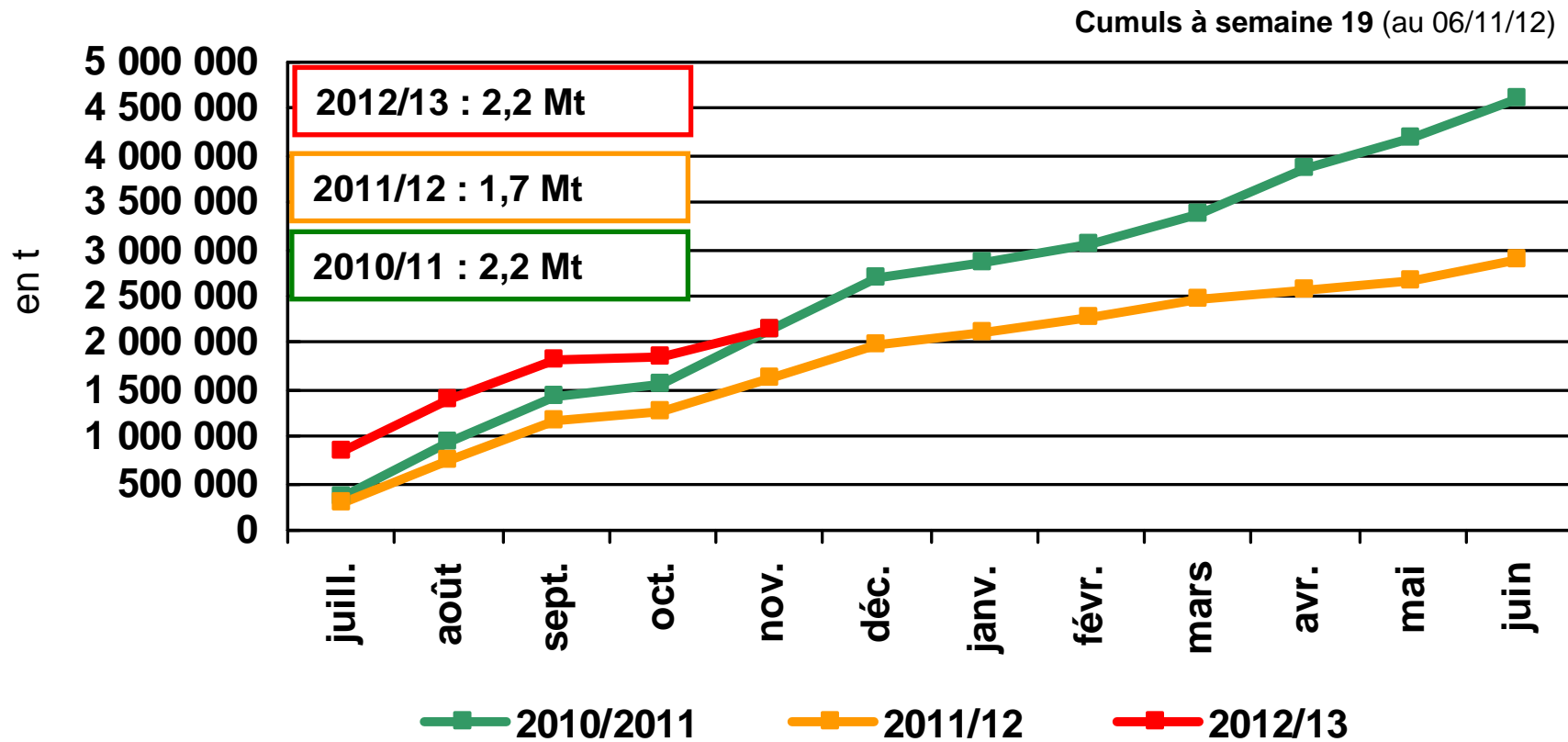
Source : Commission européenne

Blé dur : certificats à l'exportation délivrés dans l'UE



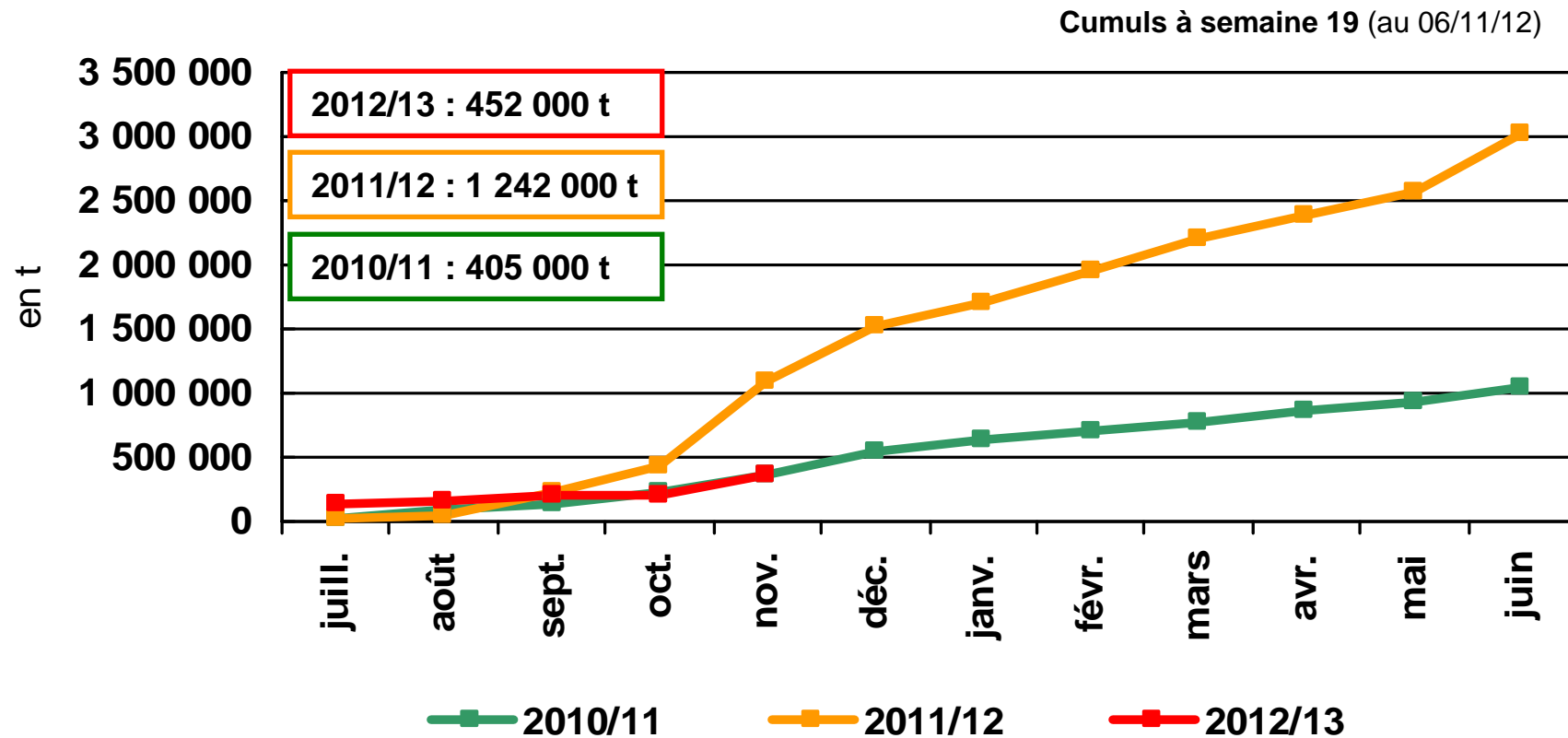
Source : Commission européenne

Orge : certificats à l'exportation délivrés dans l'UE



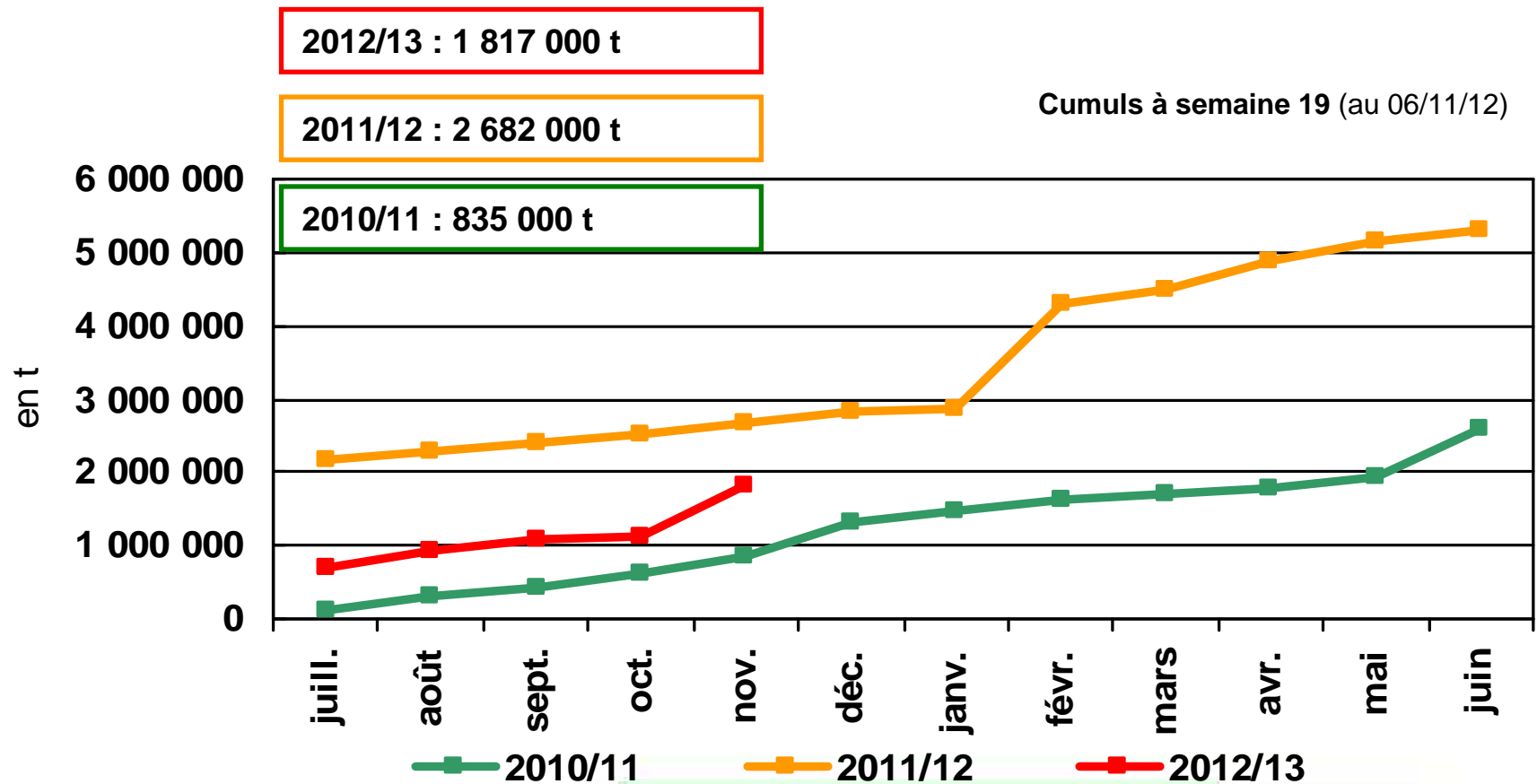
Source : Commission européenne

Maïs : certificats à l'exportation délivrés dans l'UE

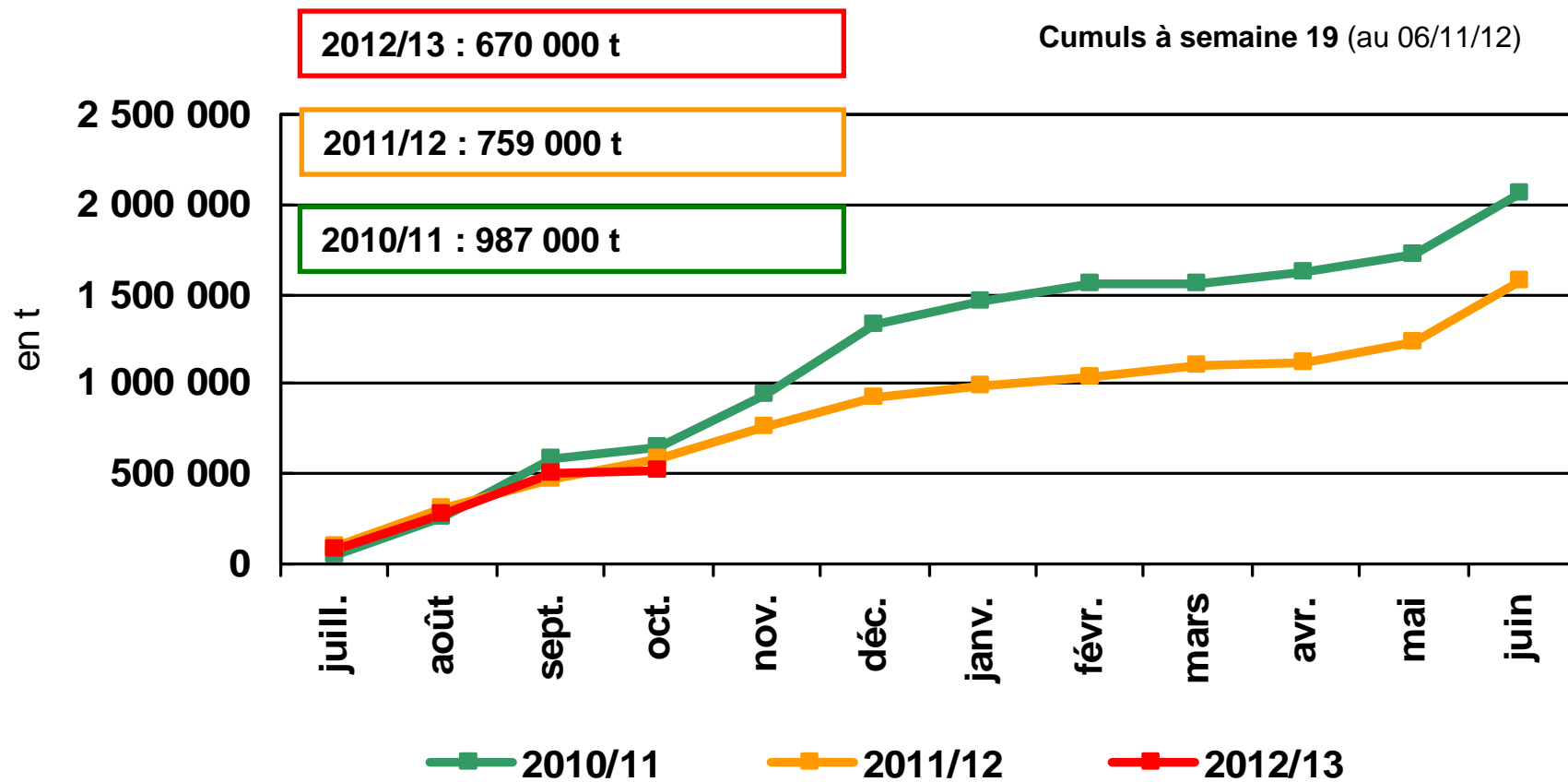


Source : Commission européenne

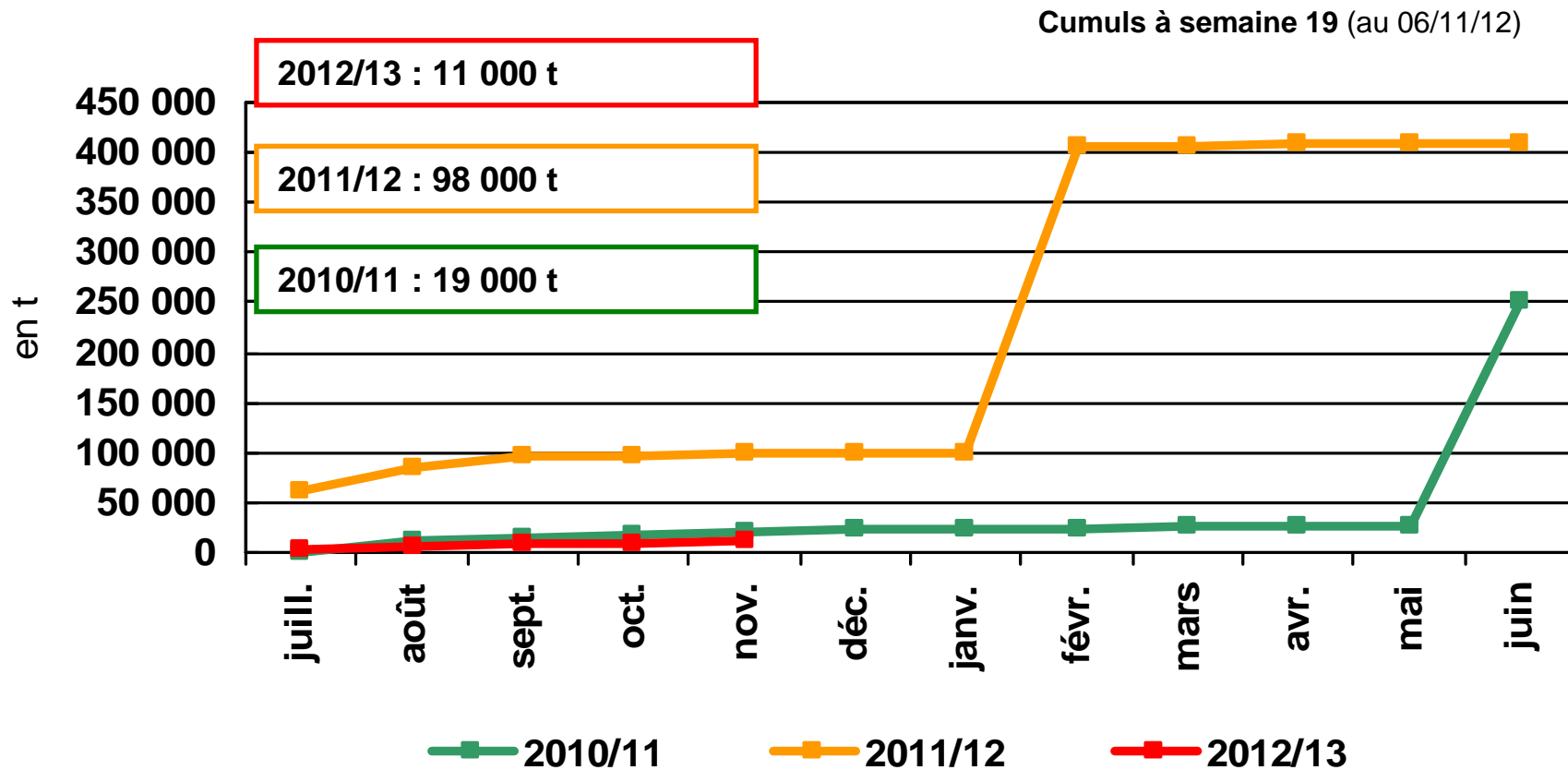
Blé tendre : certificats à l'importation délivrés dans l'UE



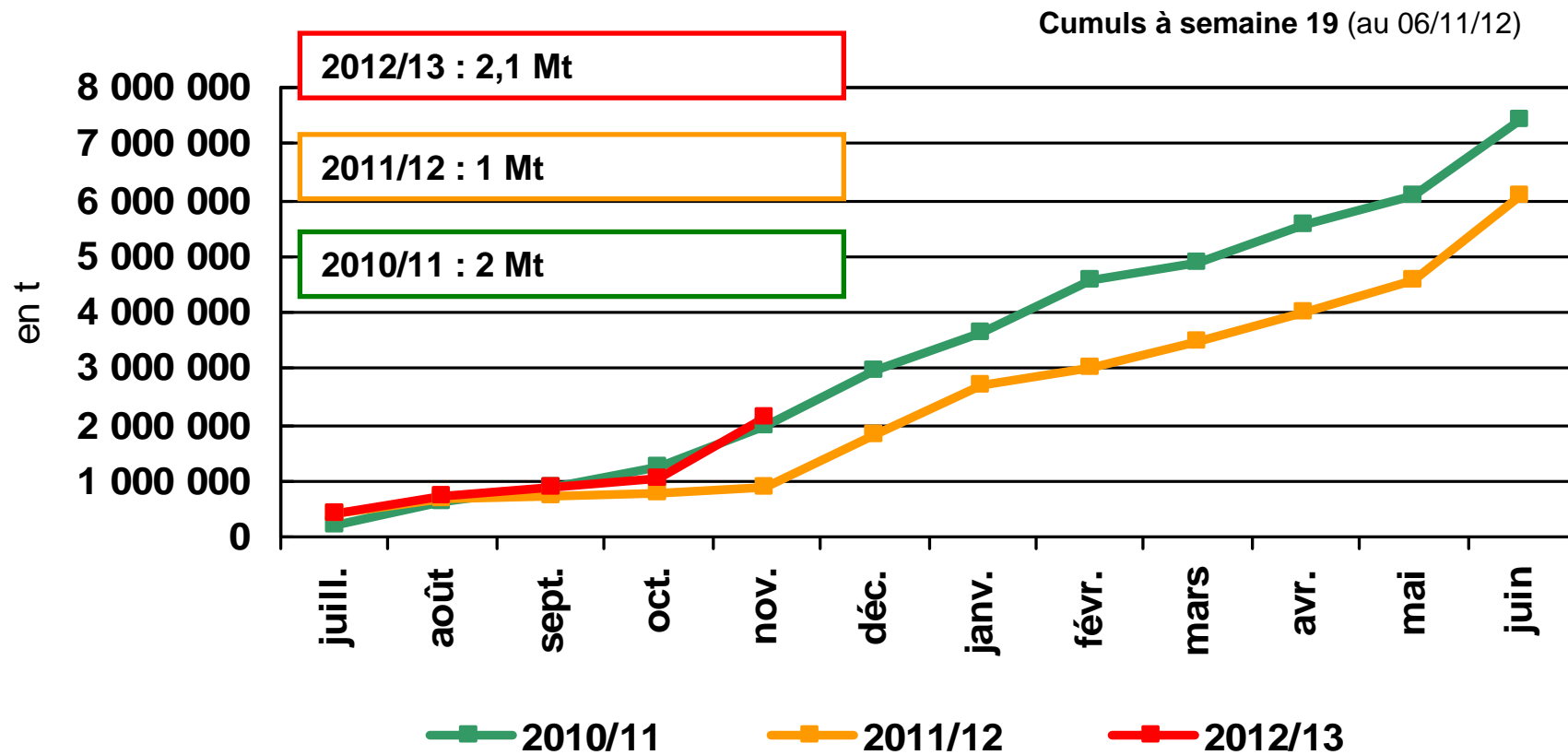
Blé dur : certificats à l'importation délivrés dans l'UE



Orge : certificats à l'importation délivrés dans l'UE

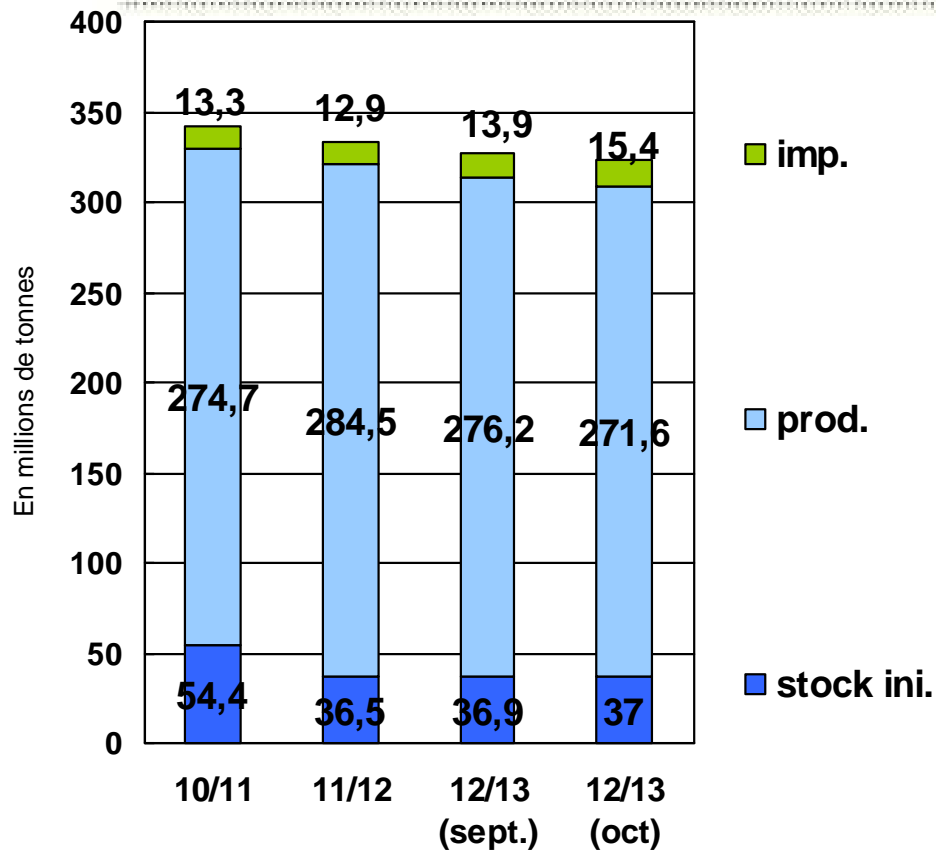


Maïs : certificats à l'importation délivrés dans l'UE

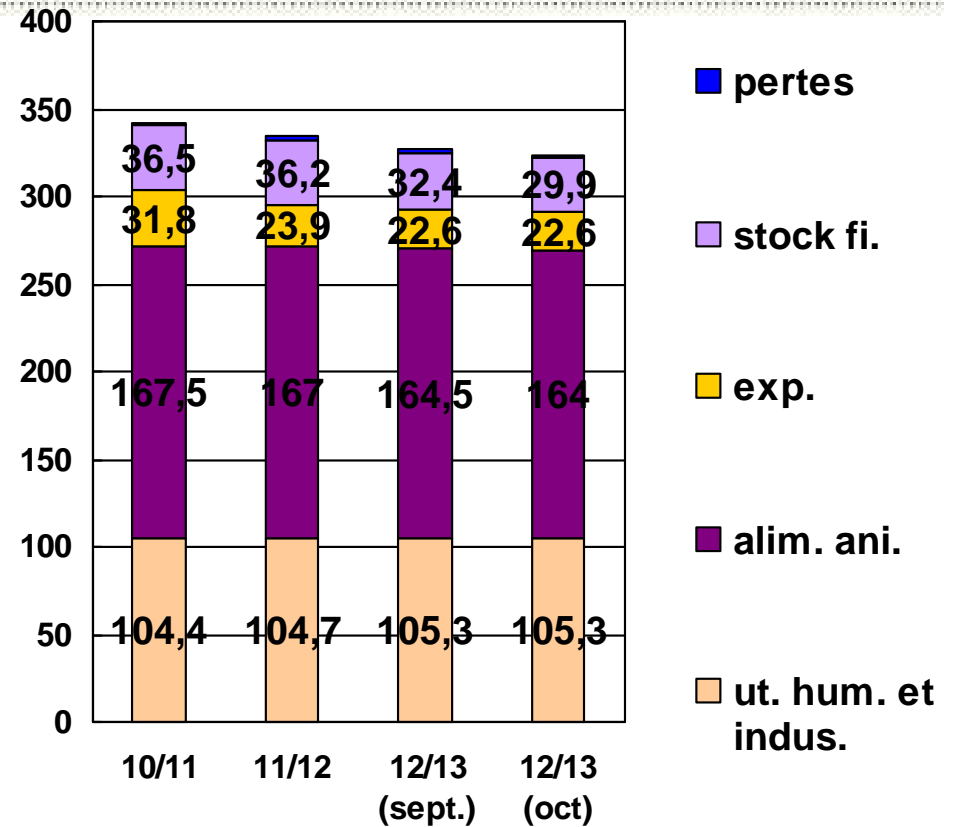


UE - bilan toutes céréales

Total dispo 2012/13 : 324 Mt

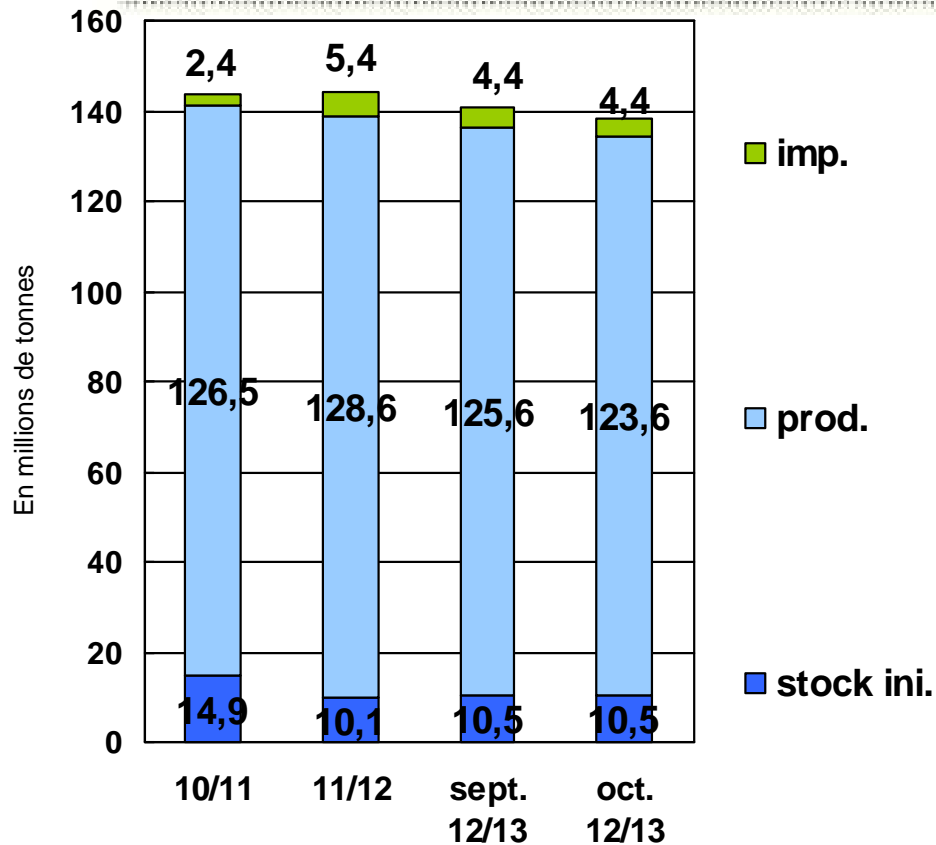


Total utilisation 2012/13 : 324 Mt

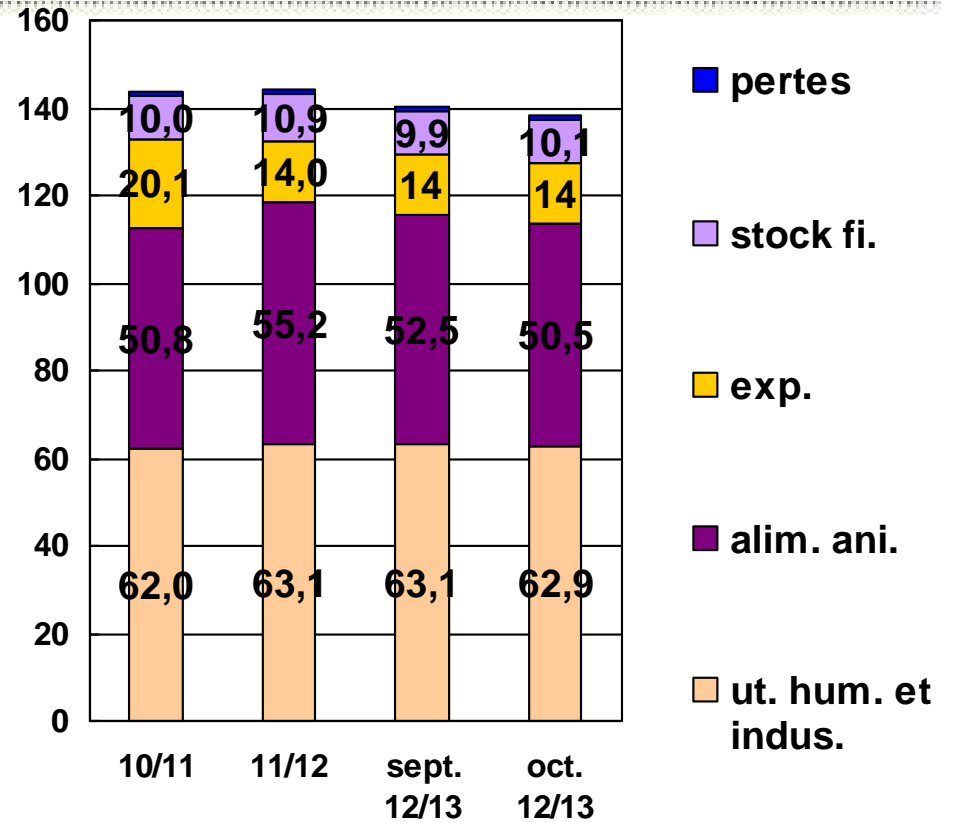


UE - bilan blé tendre

Total dispo 2012/13 : 138,5 Mt

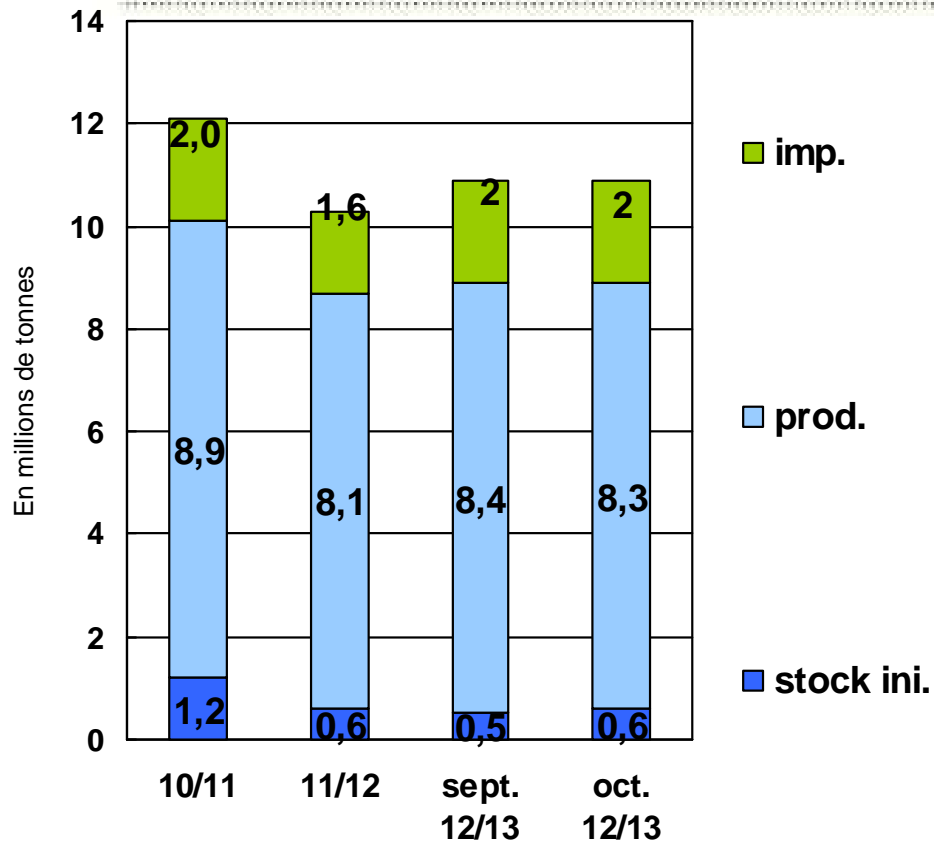


Total utilisation 2012/13 : 138,5 Mt

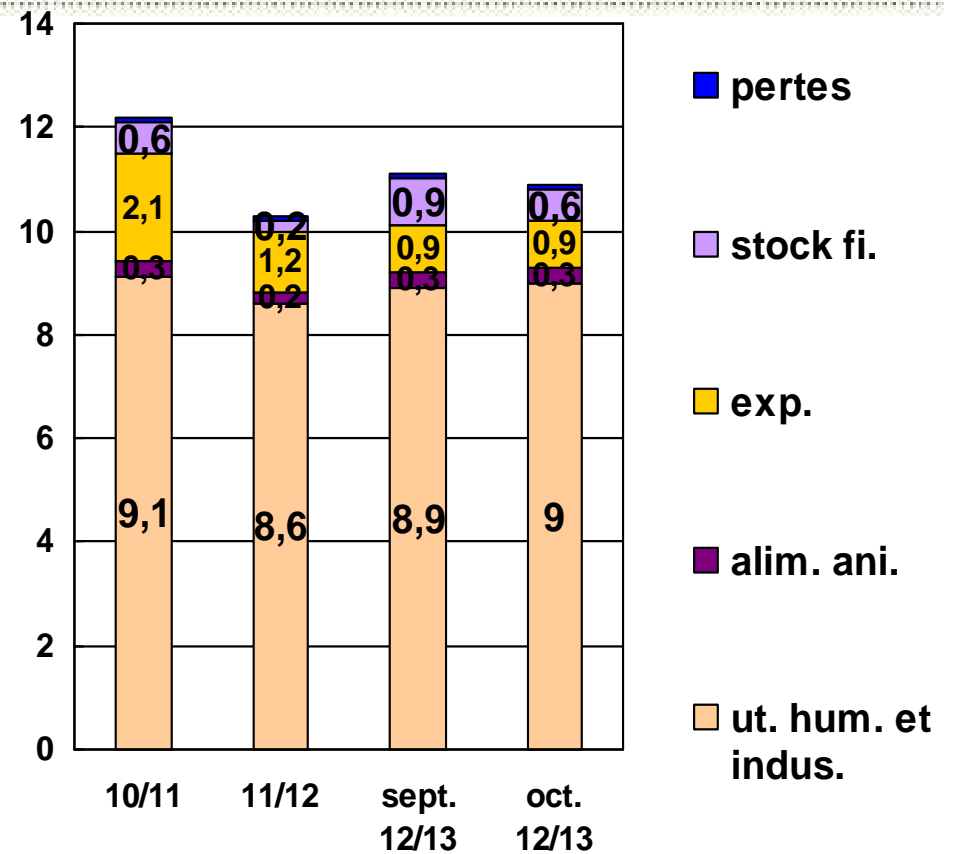


UE - bilan blé dur

Total dispo 2012/13 : 10,9 Mt

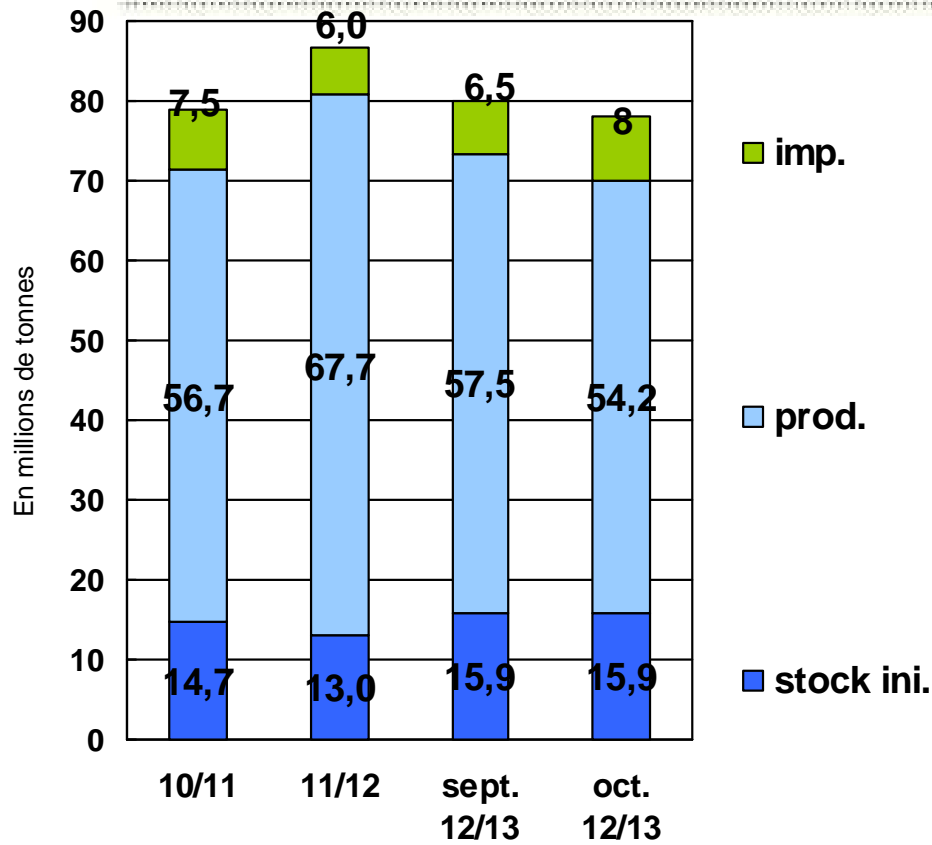


Total utilisation 2012/13 : 10,9 Mt

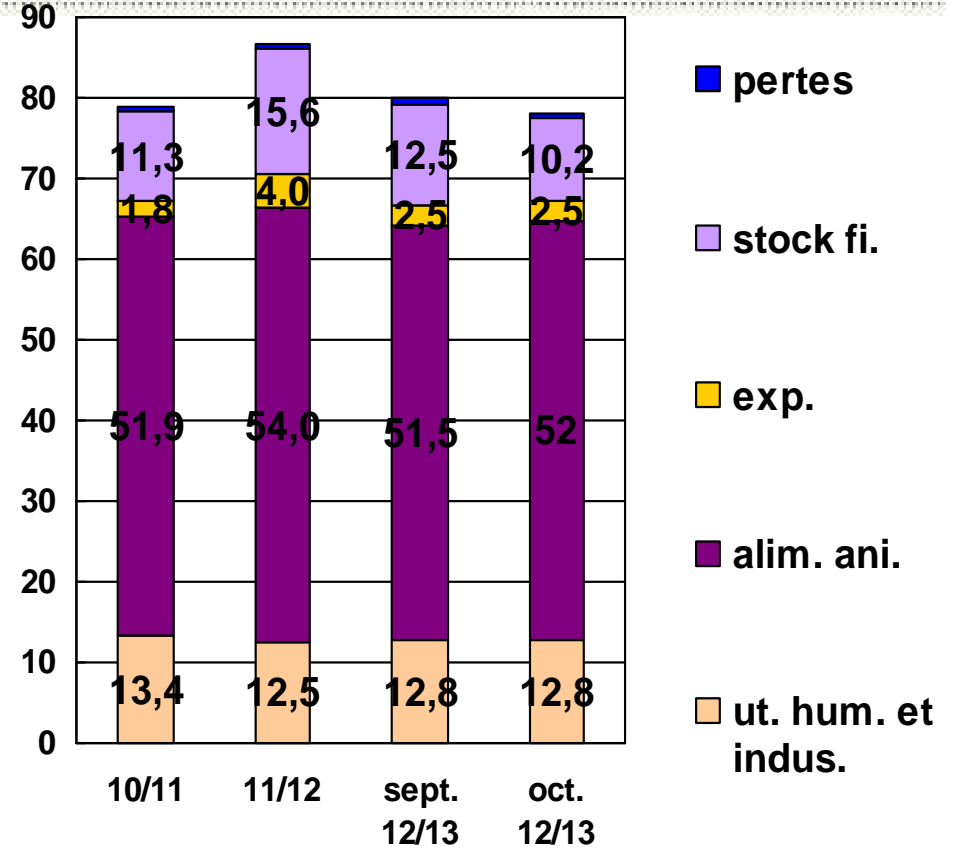


UE - bilan maïs

Total dispo 2012/13 : 78,1 Mt

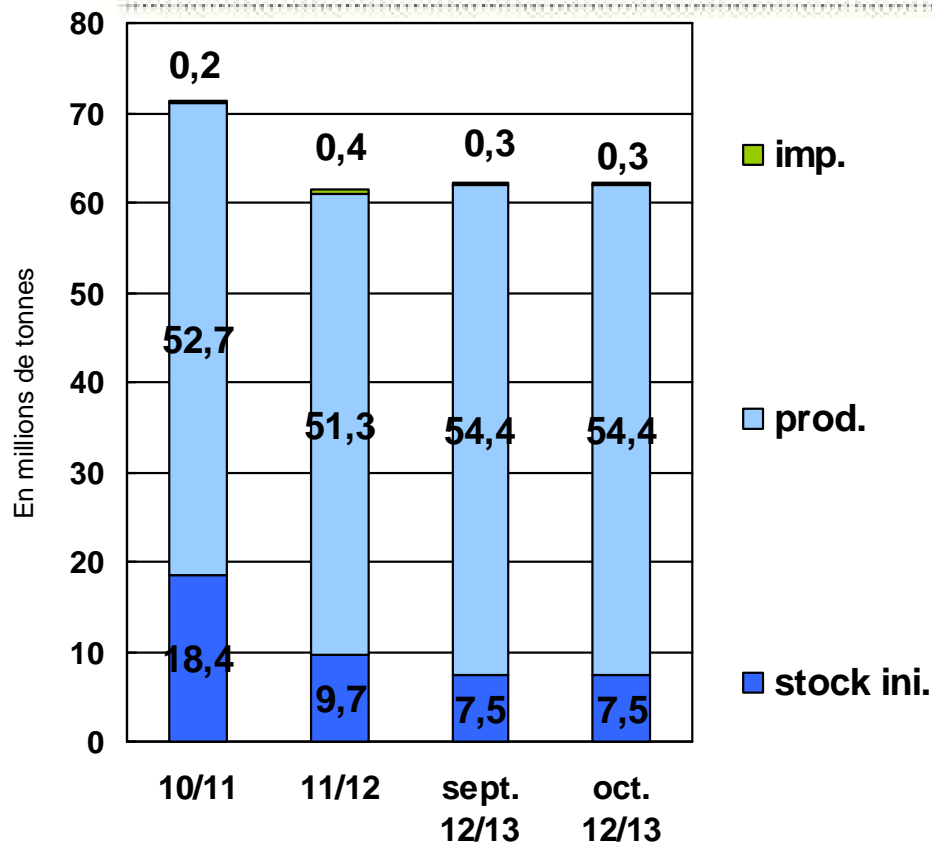


Total utilisation 2012/13 : 78,1 Mt

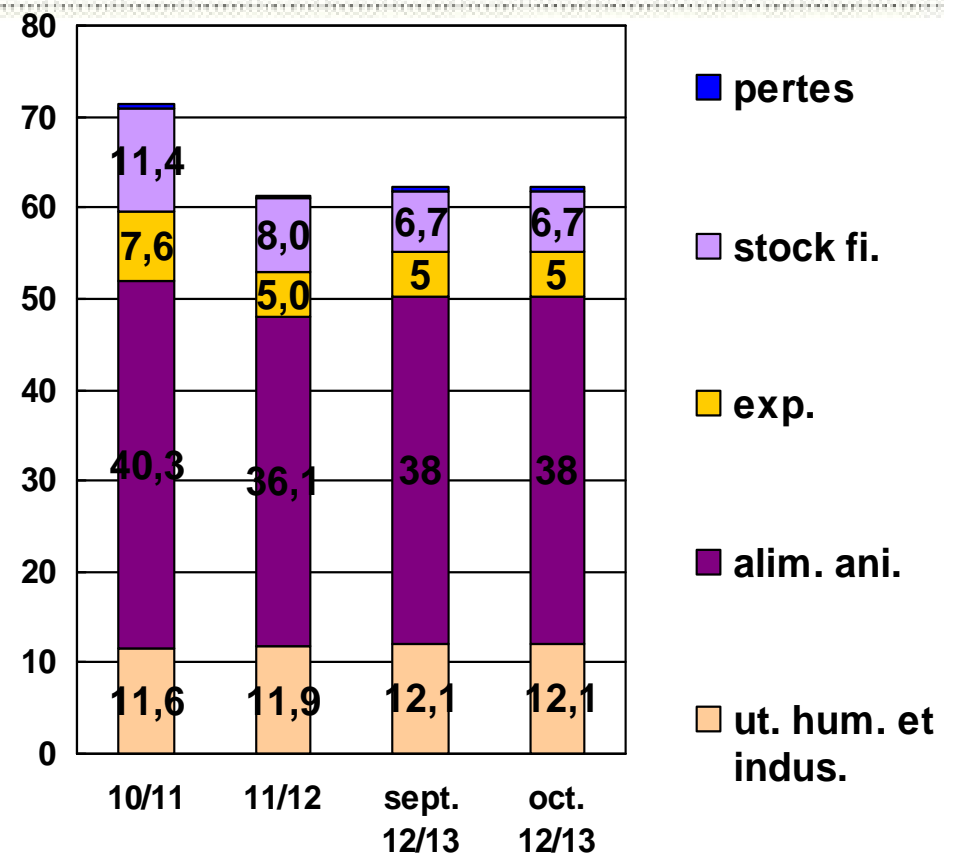


UE - bilan orge

Total dispo 2012/13 : 62,1 Mt

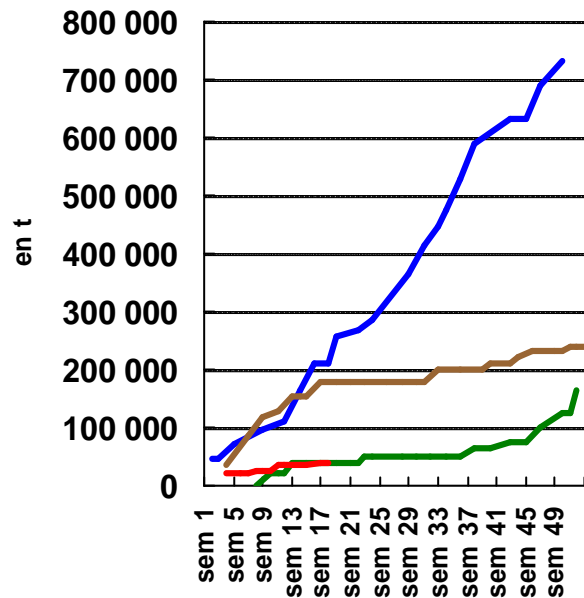


Total utilisation 2012/13 : 62,1 Mt

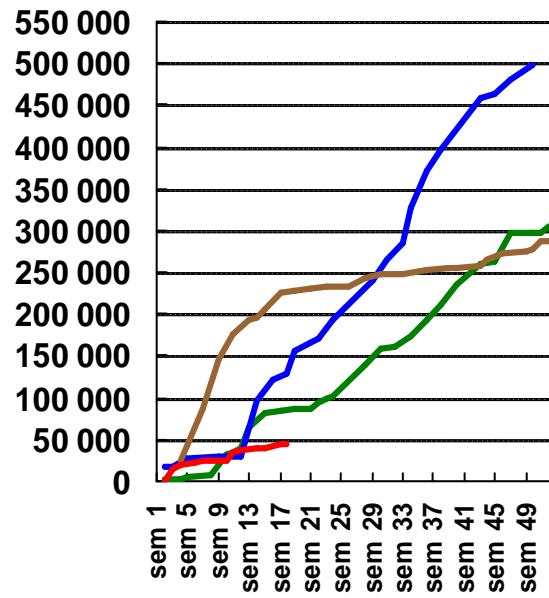


IMPORTATIONS DE "PRODUITS DE SUBSTITUTION DES CEREALES" (PSC) Certificats délivrés, en cumul depuis le début de campagne

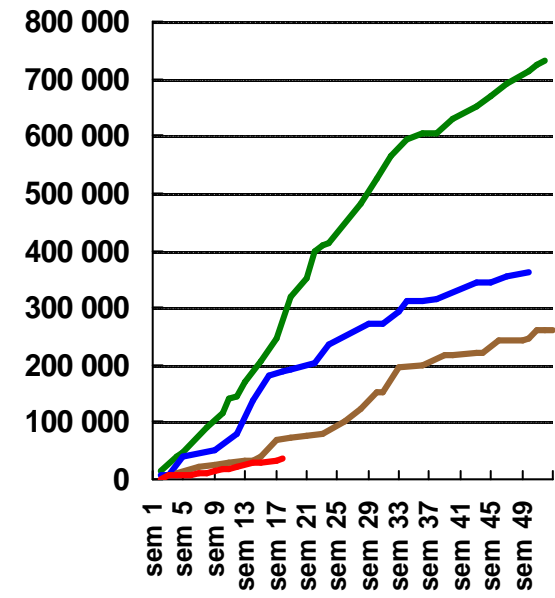
Corn gluten feed



Drèches de brasserie

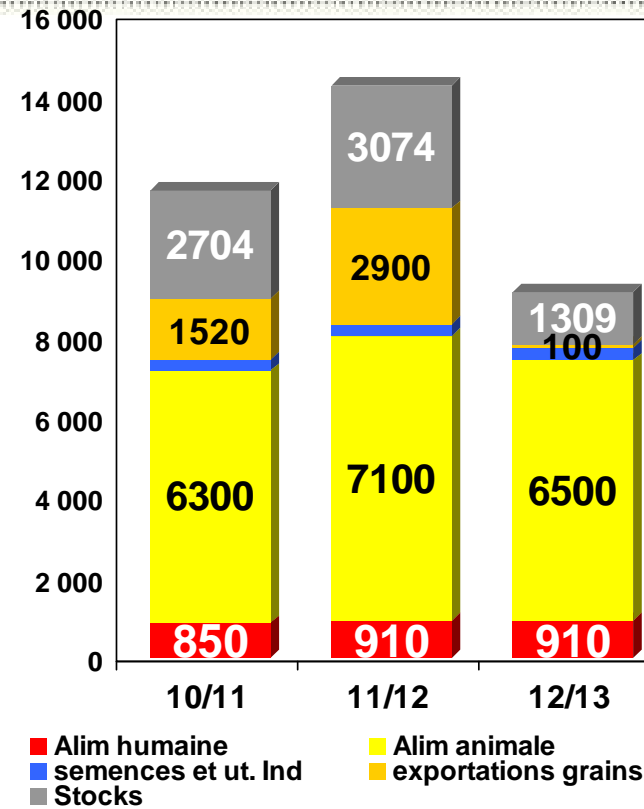
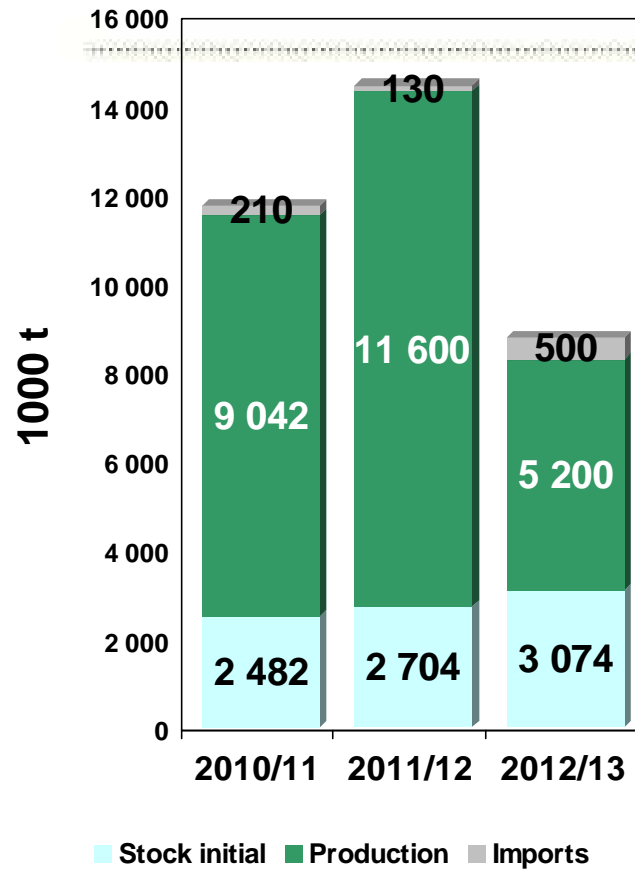


Pulpes d'agrumes

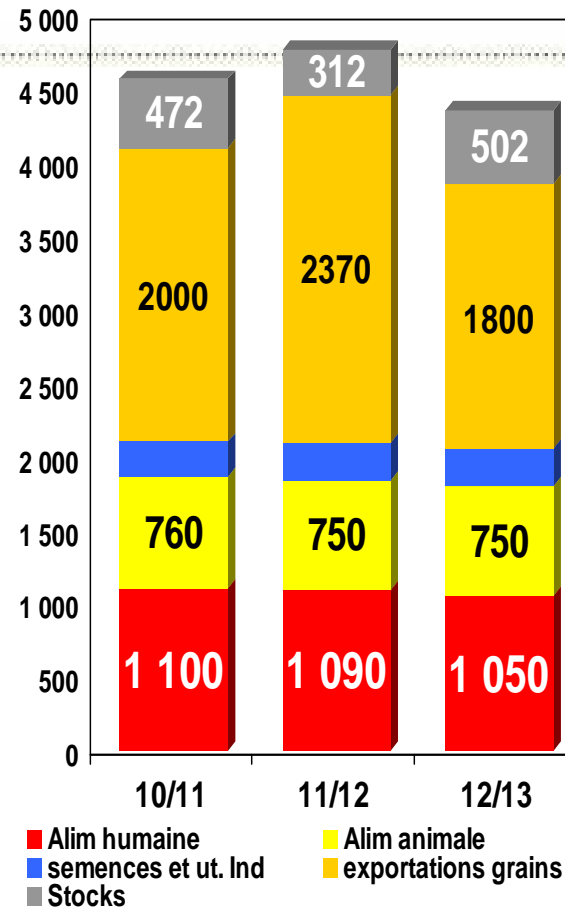
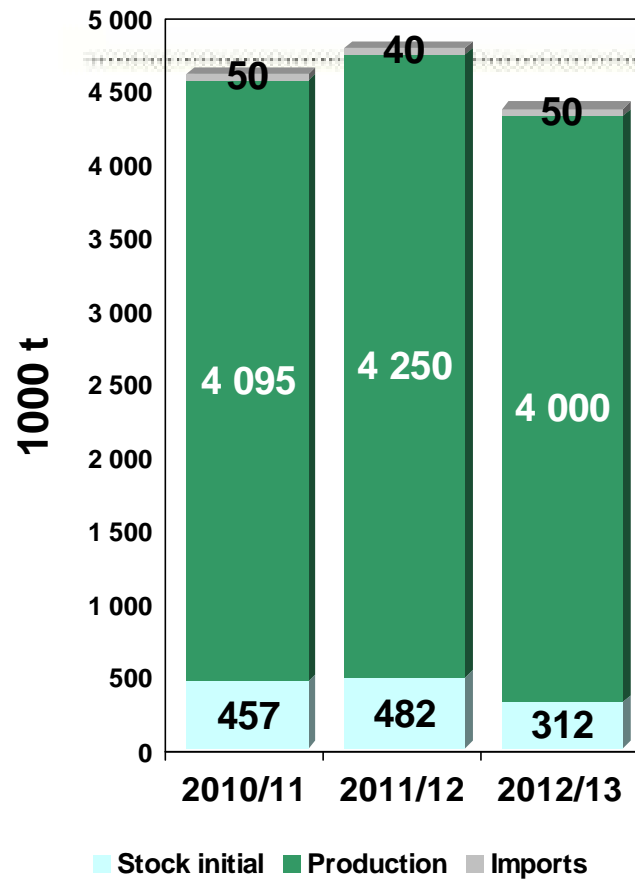


— 2009/10 — 2010/11
— 2011/12 — 2012/13

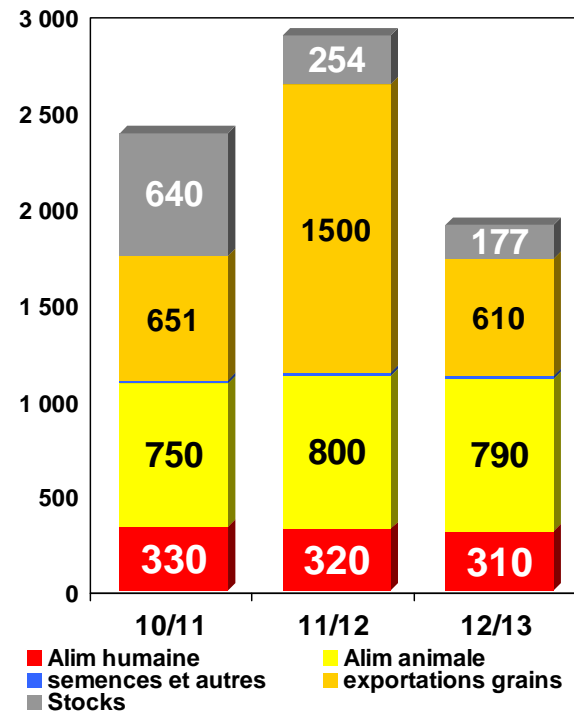
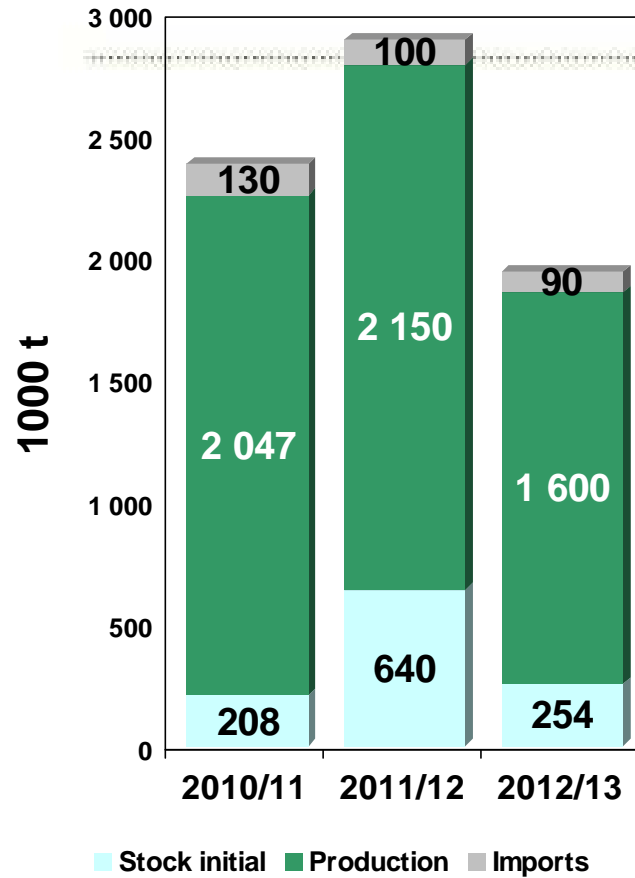
ROUMANIE : Bilan maïs



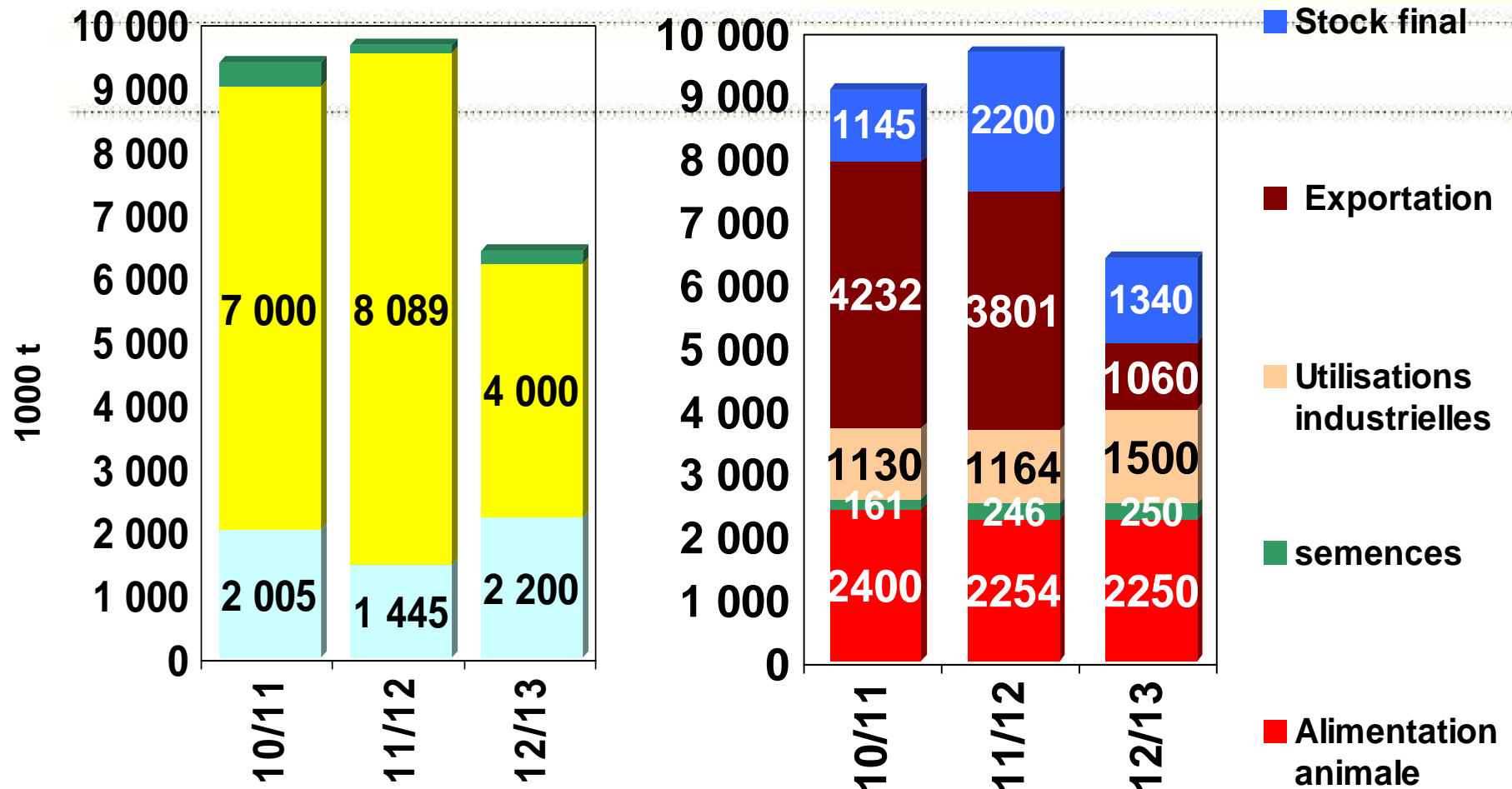
BULGARIE : bilan blé tendre



BULGARIE : bilan maïs

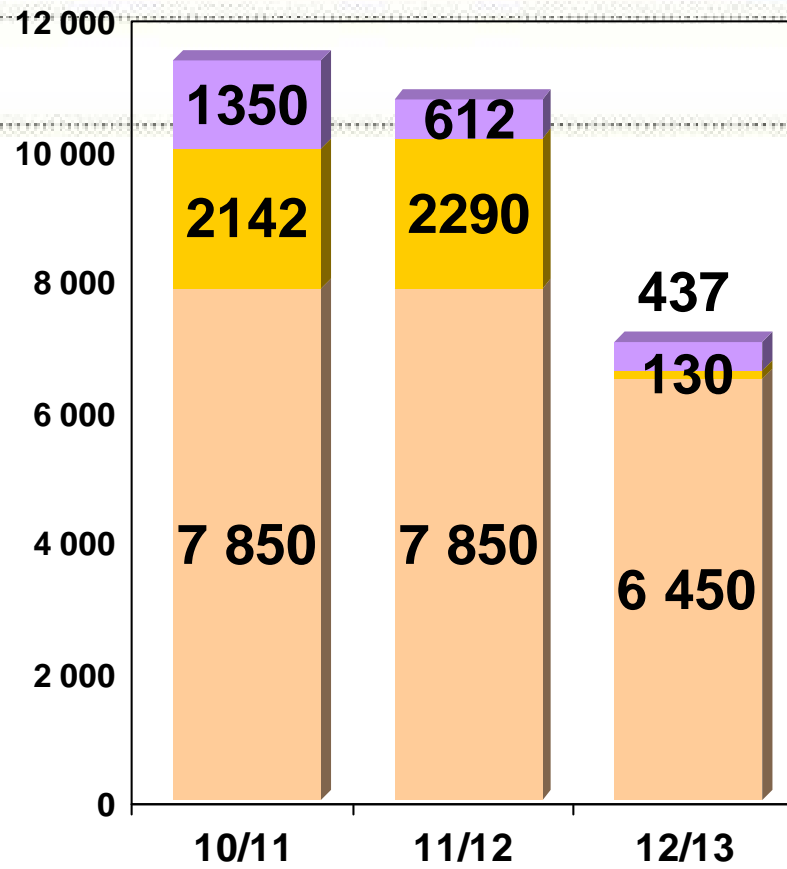
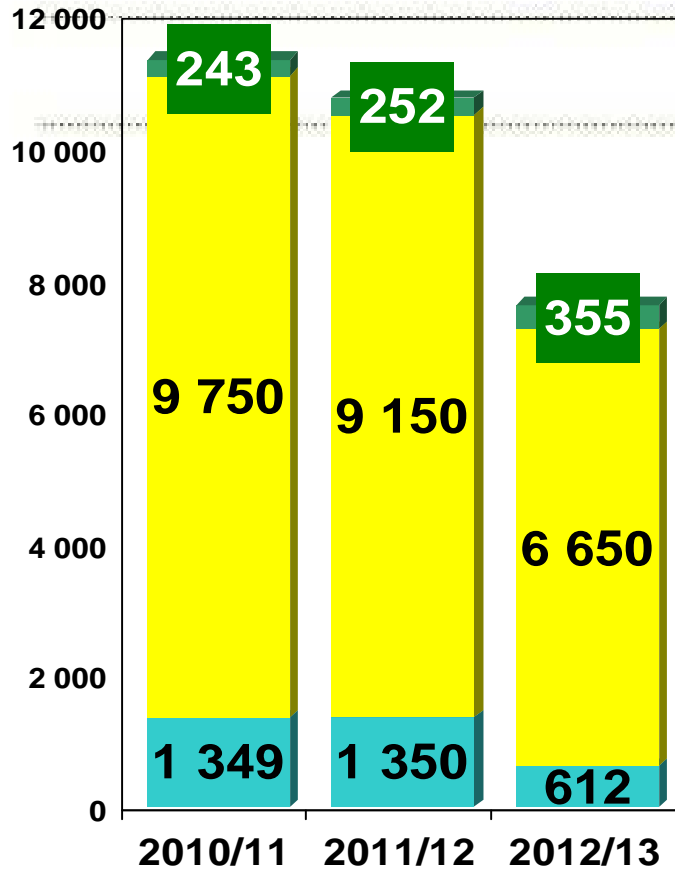


Hongrie, bilan maïs



Stock Production

Bilan Maïs Balkans occidentaux



■ Stock initial ■ Production ■ Imports

■ Conso intérieure ■ exportations grains ■ Stocks

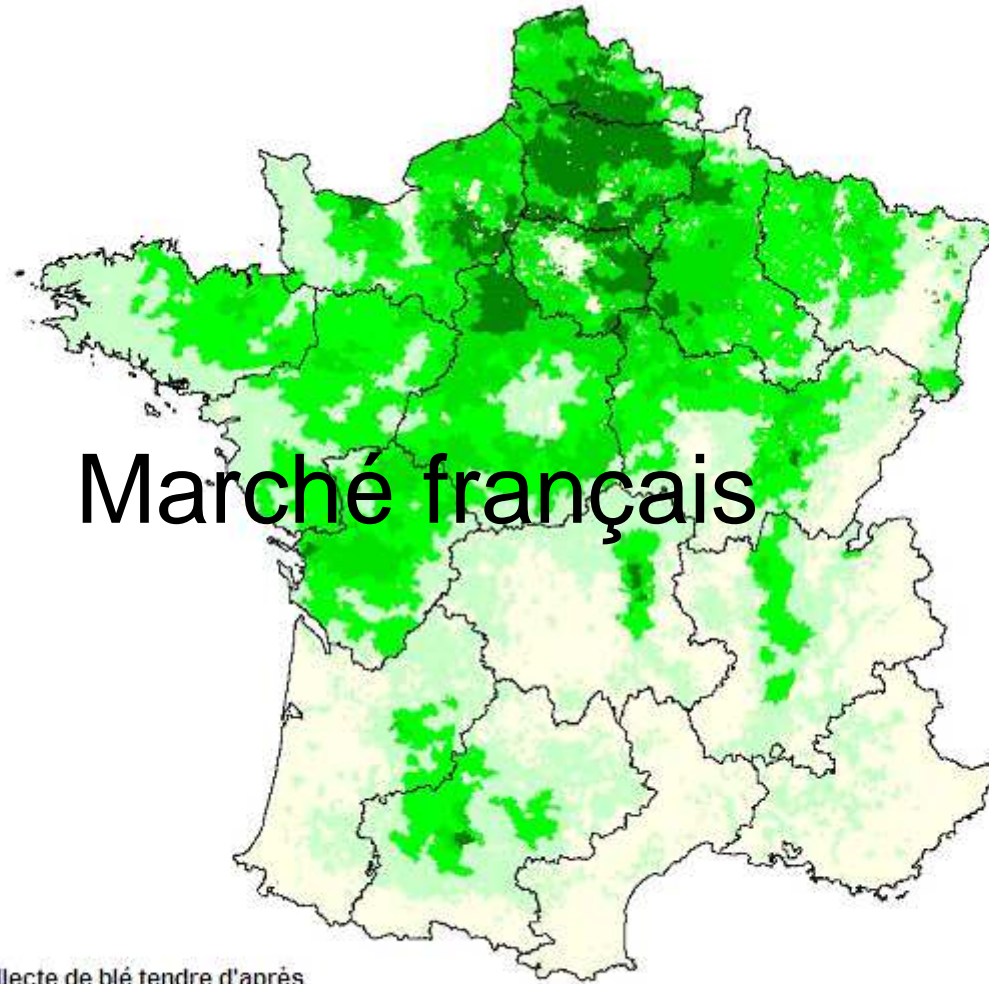


Production de maïs de l'Europe danubienne

Roumanie	9 042	11 600	5 200	-55%
Bulgarie	2 047	2 150	1 600	-26%
Hongrie	7 000	8 089	4 000	-51%
Balkans occidentaux	9 750	9 150	6 650	-27%
Total	27 839	30 989	17 450	-44%



FranceAgriMer

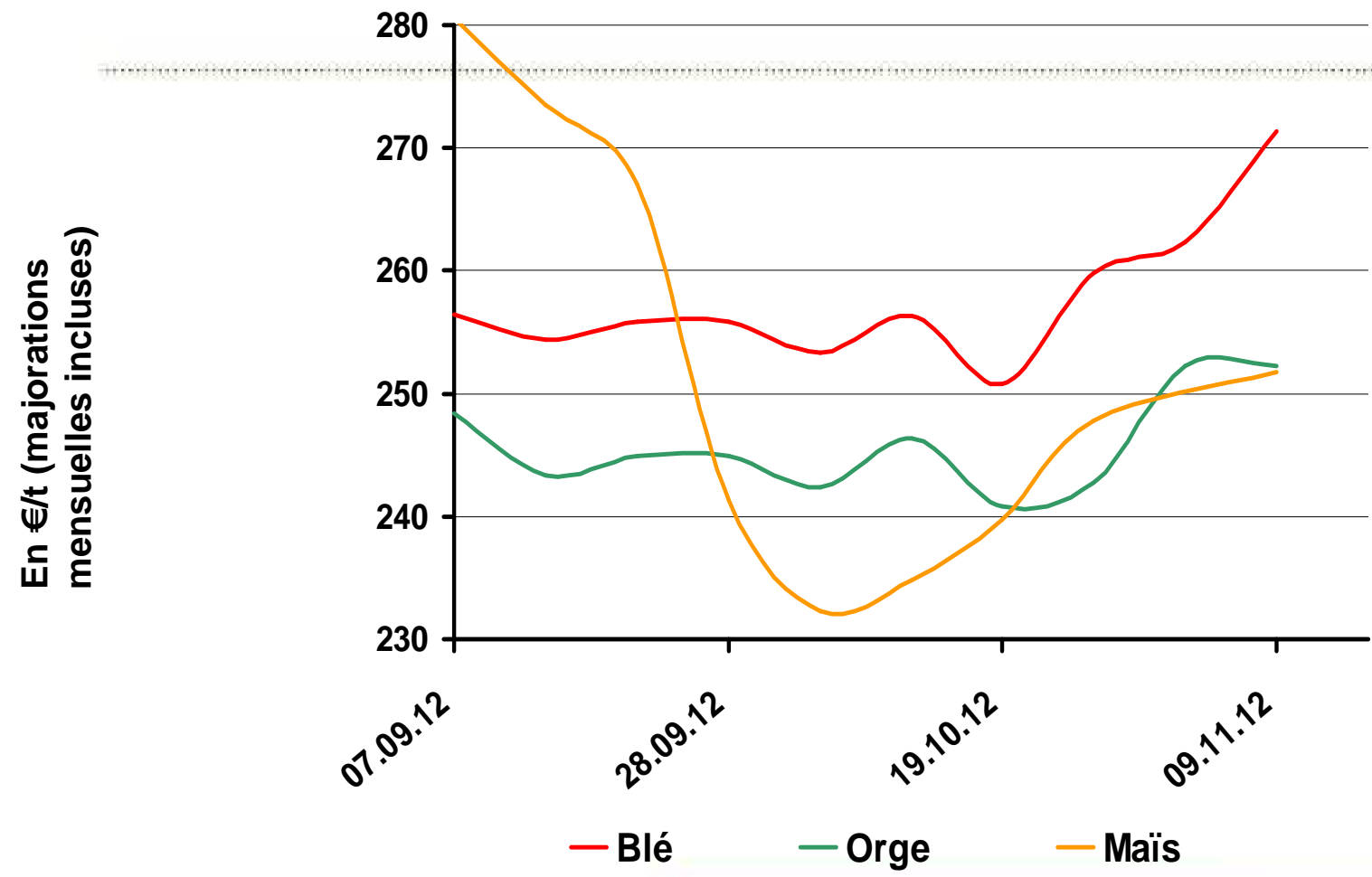


Marché français

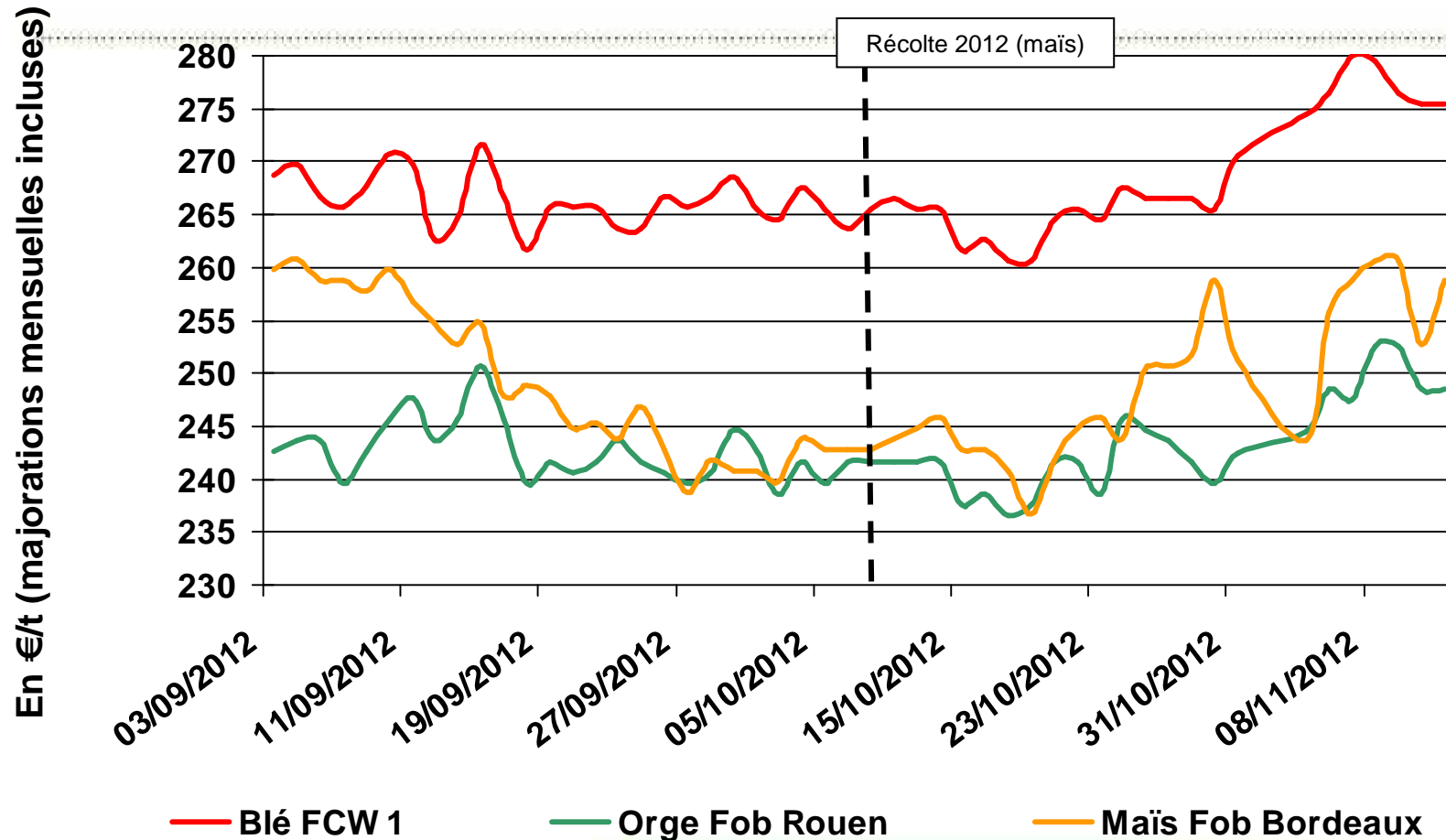
densité de collecte de blé tendre d'après les états 1 FranceAgriMer



Prix du blé tendre, de l'orge et du maïs en rendu Pontivy

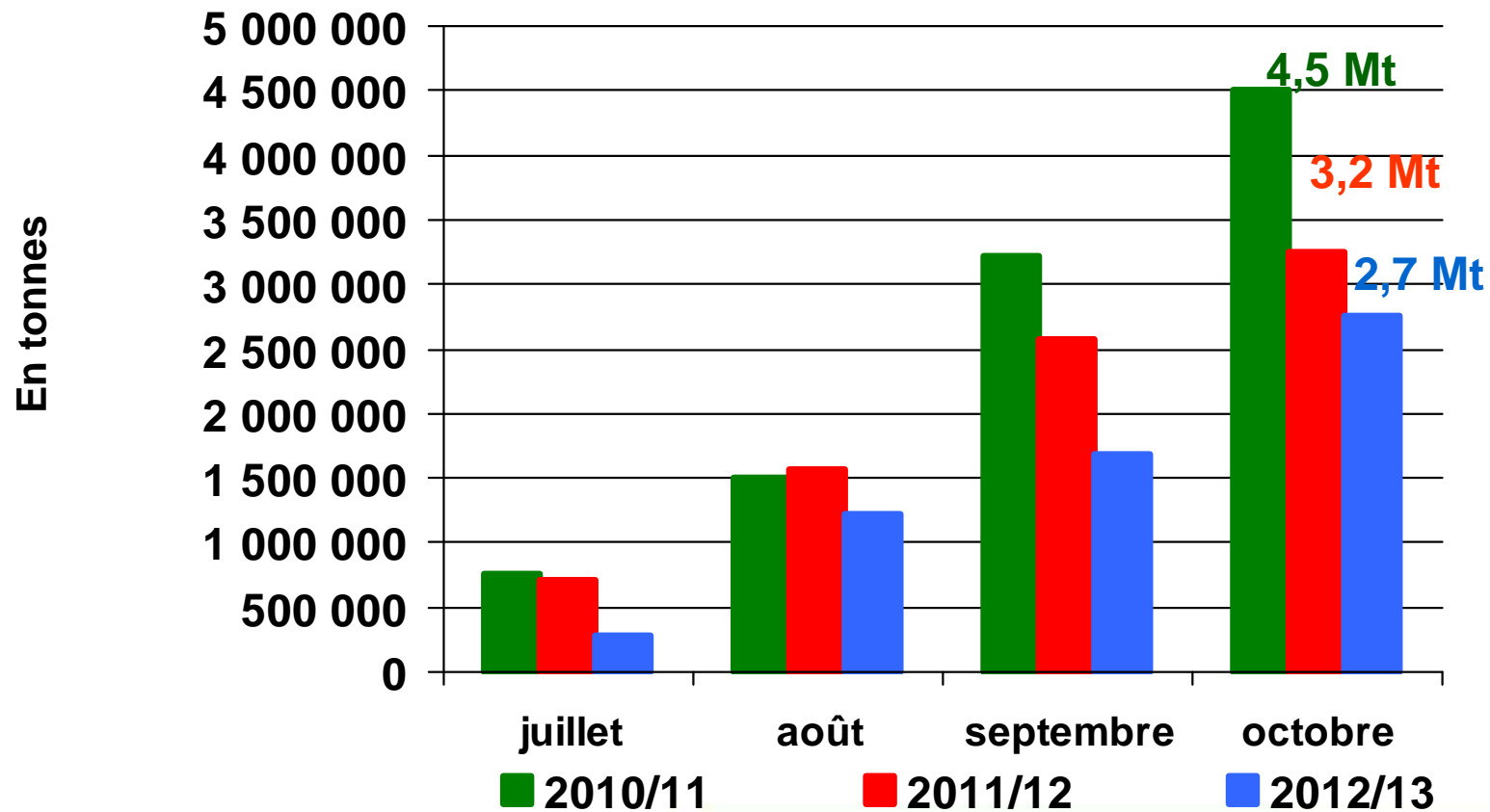


Céréales françaises : cotations à l'exportation



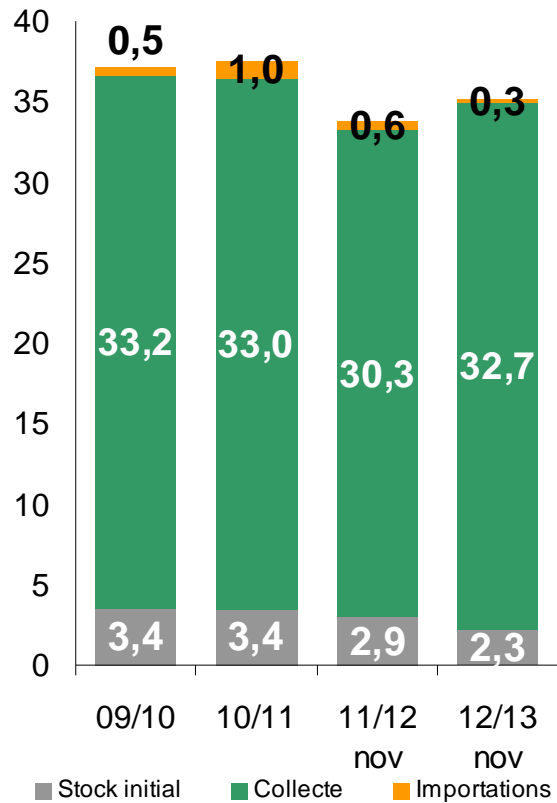


Blé tendre : cumul des embarquements vers les pays tiers depuis les ports français

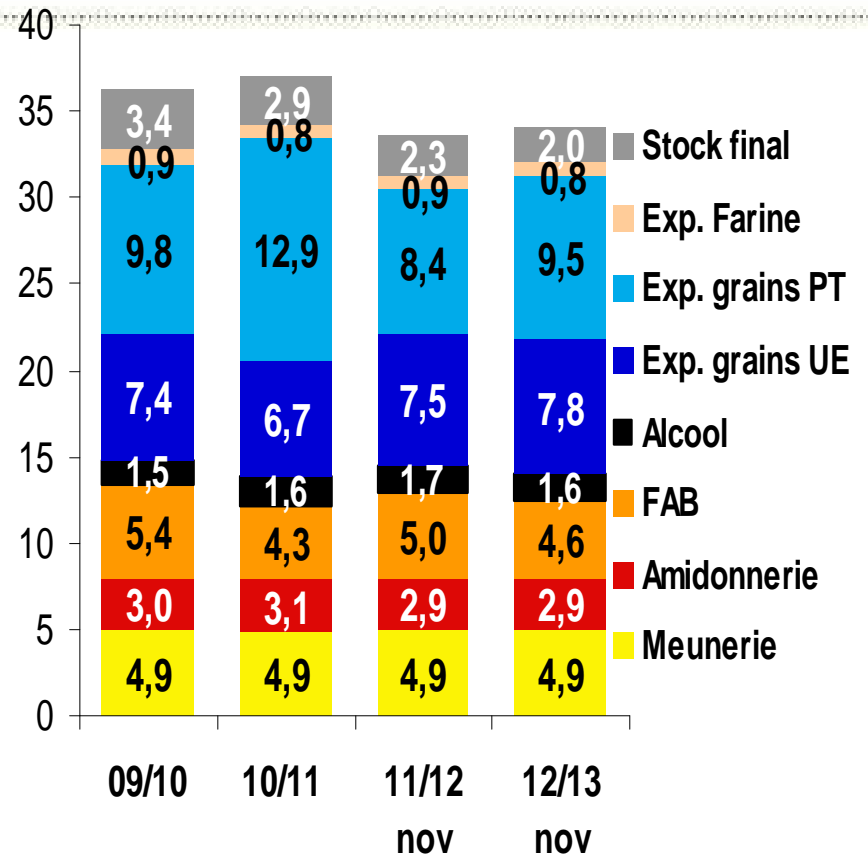


Bilan blé tendre

Mt



Mt

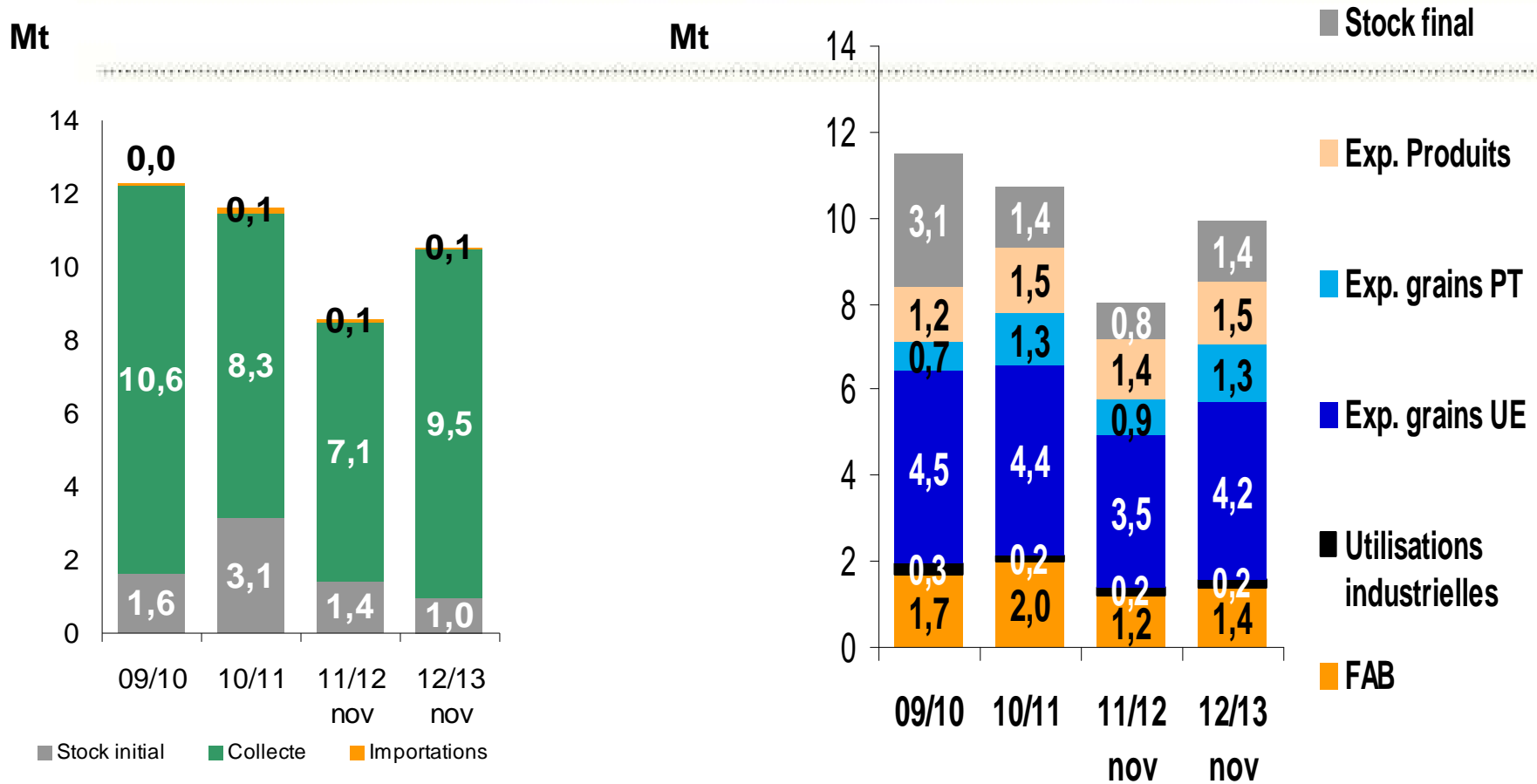


Exportations pays tiers au départ de la France

En Mt, projection FranceAgriMer

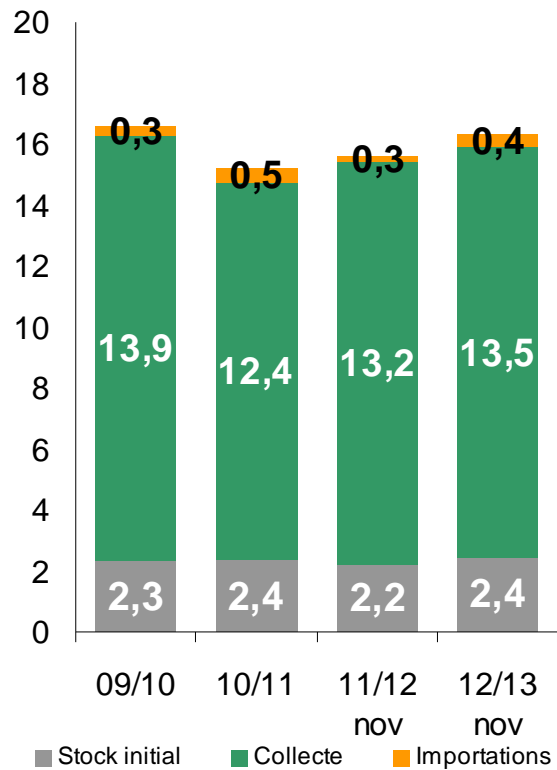
Maroc	2,5
Algérie	3,5
Tunisie	0,1
Lybie	0,1
Egypte	1,5
Ethiopie	-
Cuba	0,4
Syrie	-
Chine	-
Afrique subsaharienne	2,1
Yemen	0,4
Autres	-
Total Pays-Tiers	10,6

Bilan orges

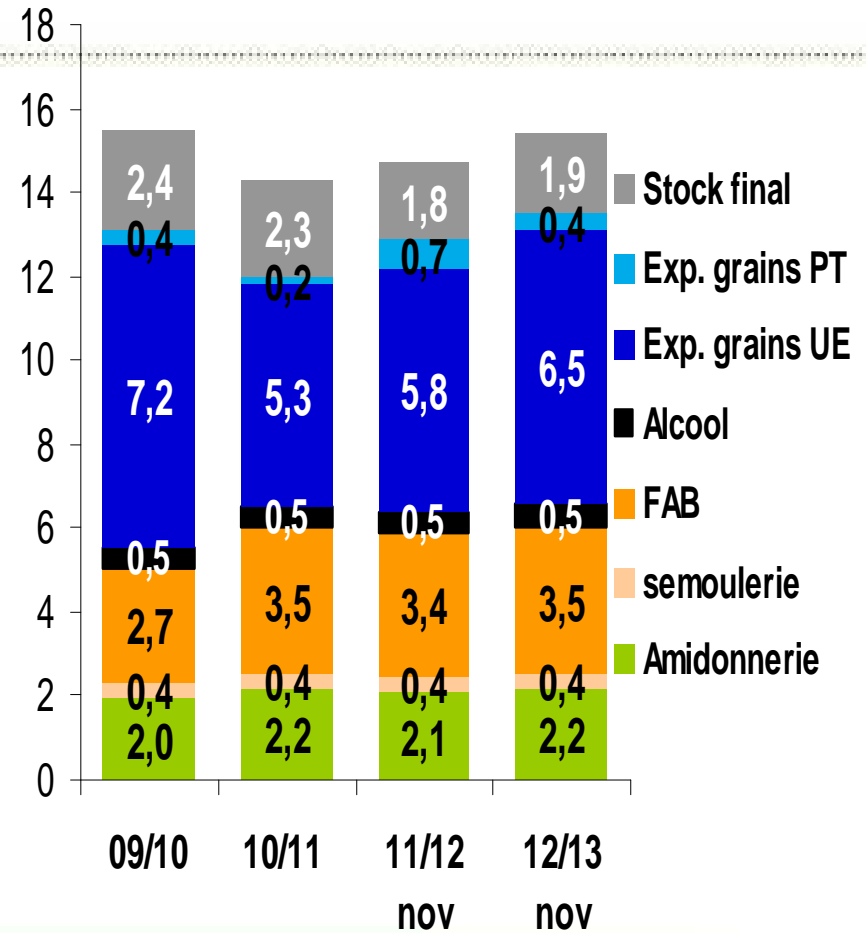


Bilan maïs

Mt

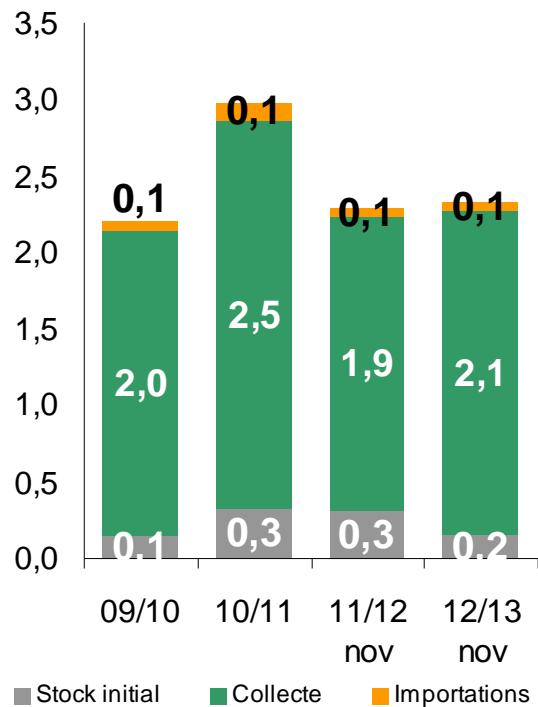


Mt

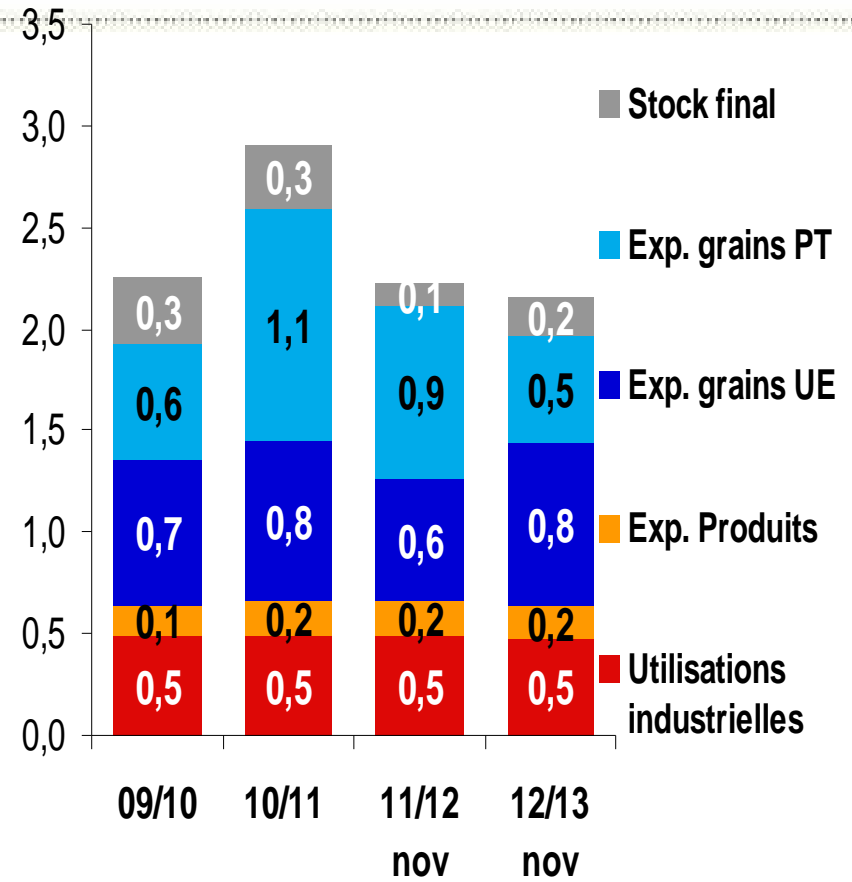


Bilan blé dur

Mt



Mt



Merci de votre attention



