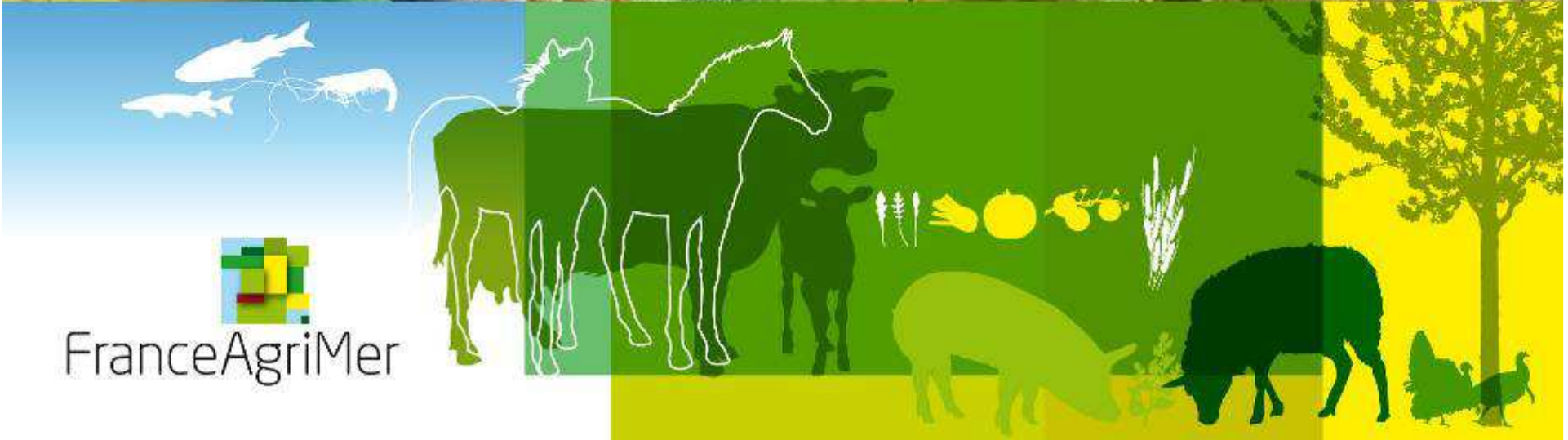


CÉRÉALES /
FRUITS ET LÉGUMES /
HORTICULTURE /
LAIT /
OLÉO-PROTÉAGINEUX /
PÊCHE ET AQUACULTURE /
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /
SUCRE /
VIANDES BLANCHES /
VIANDES ROUGES /
VINS /

FranceAgriMer



FranceAgriMer



FranceAgriMer

Marché mondial

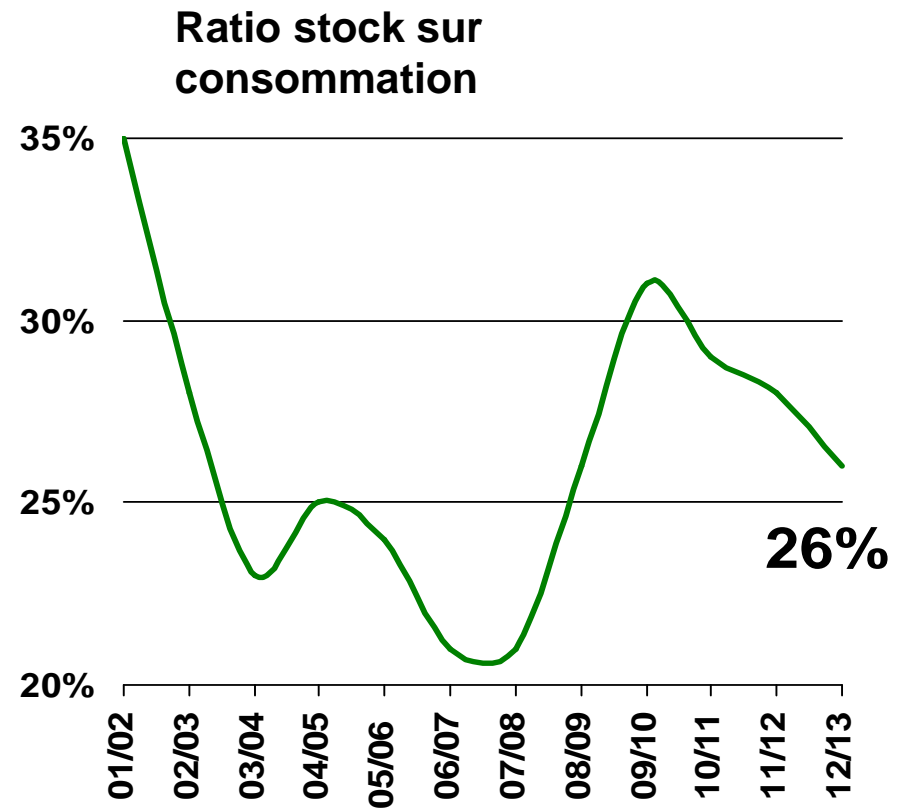
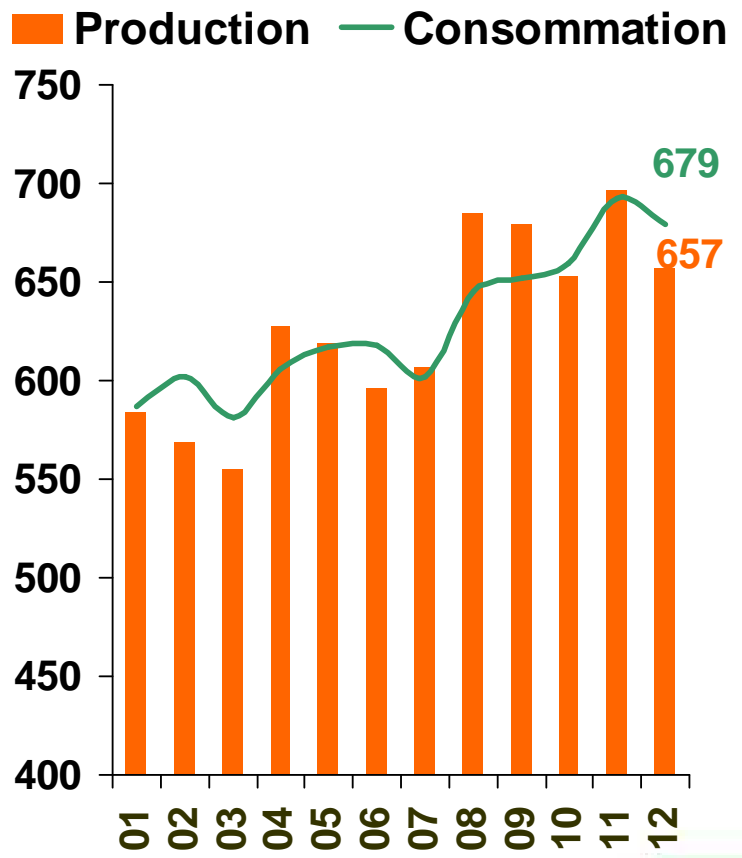


FranceAgriMer

Points clefs

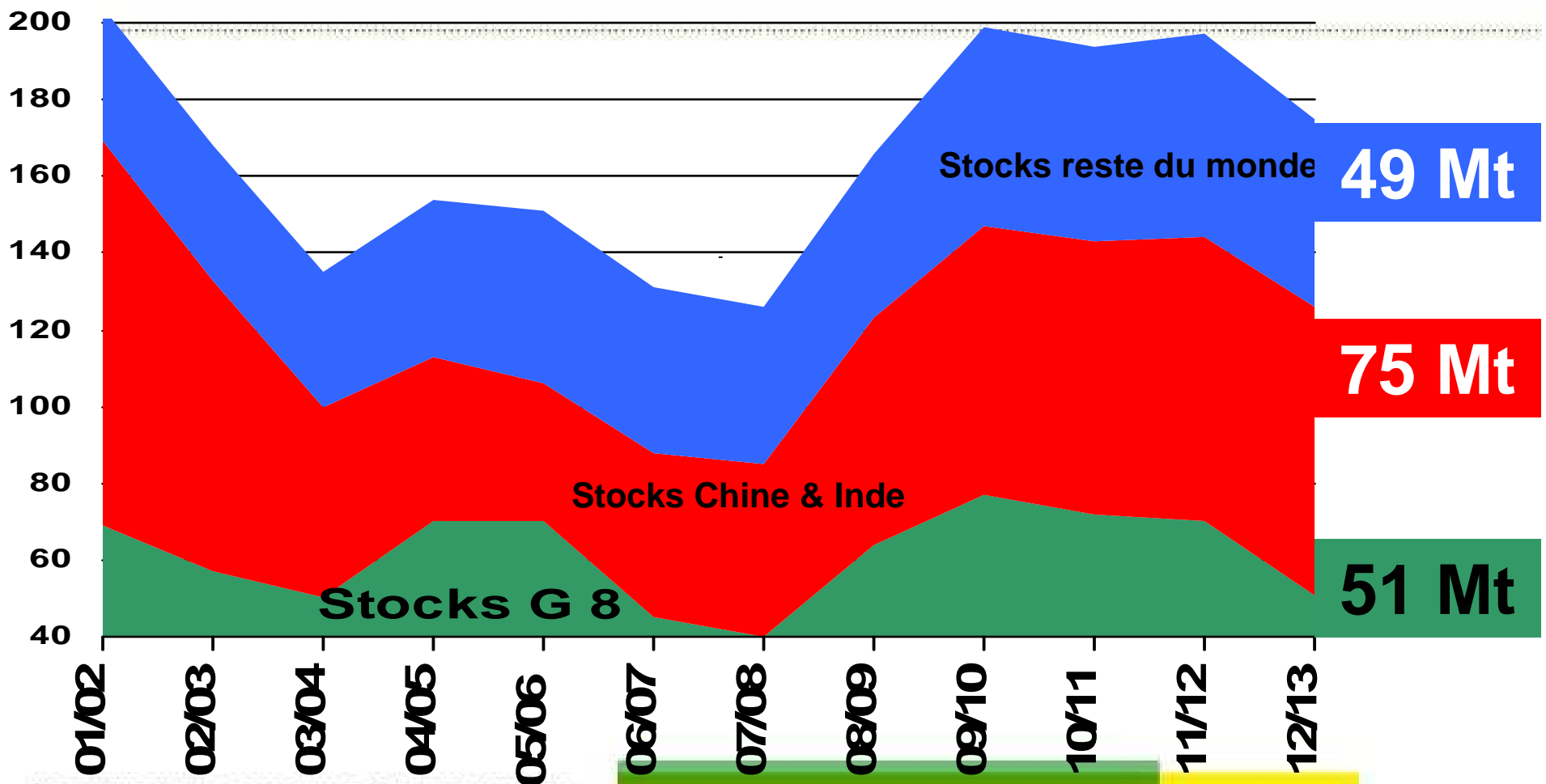
- Monde :
 - Stock US de maïs plus bas que prévu
 - Le disponible blé tendre de la mer Noire en voie d'épuisement
- UE
 - Forte révision à la baisse de la production de maïs
 - Vif rebond des prise de certificats d'exportation de blé tendre
- France
 - Baisse des cours du maïs
 - Embarquements records en ce début octobre

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

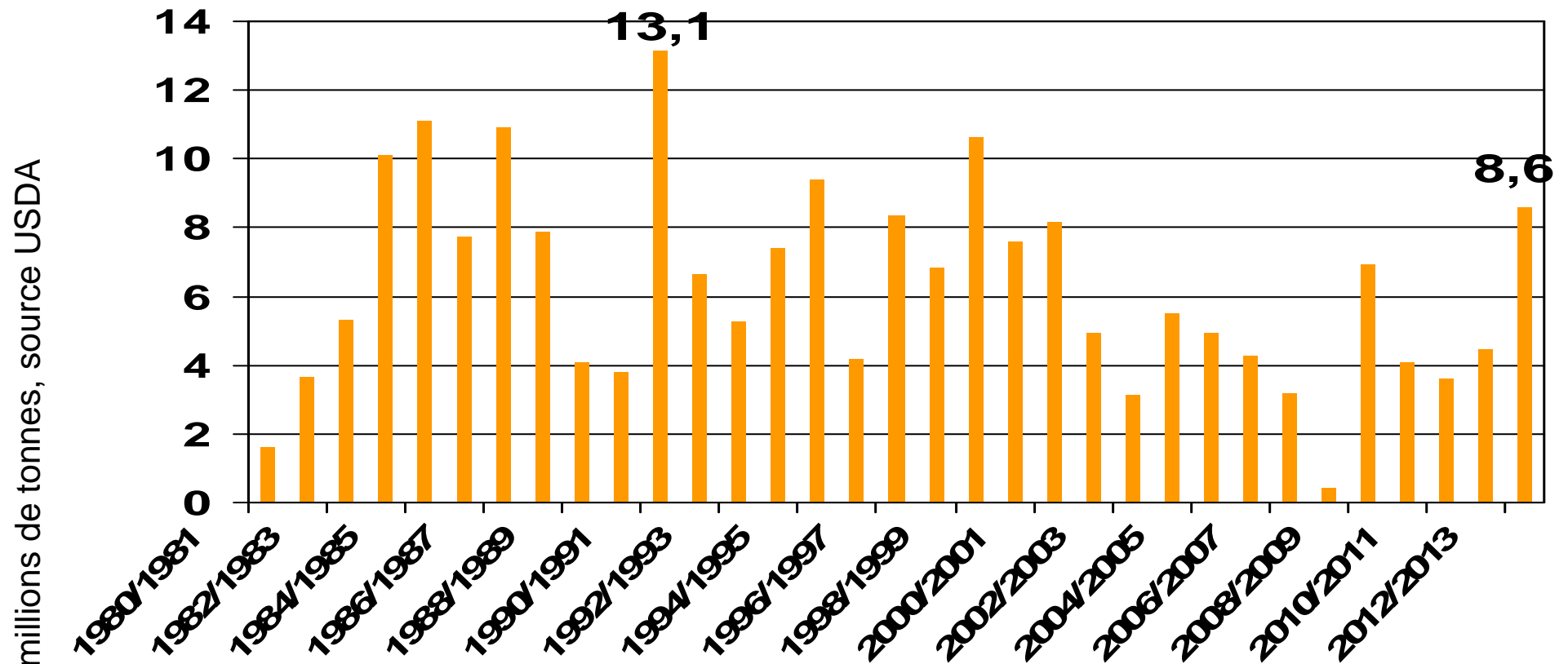


Répartition des stocks mondiaux de blé en 2012/13

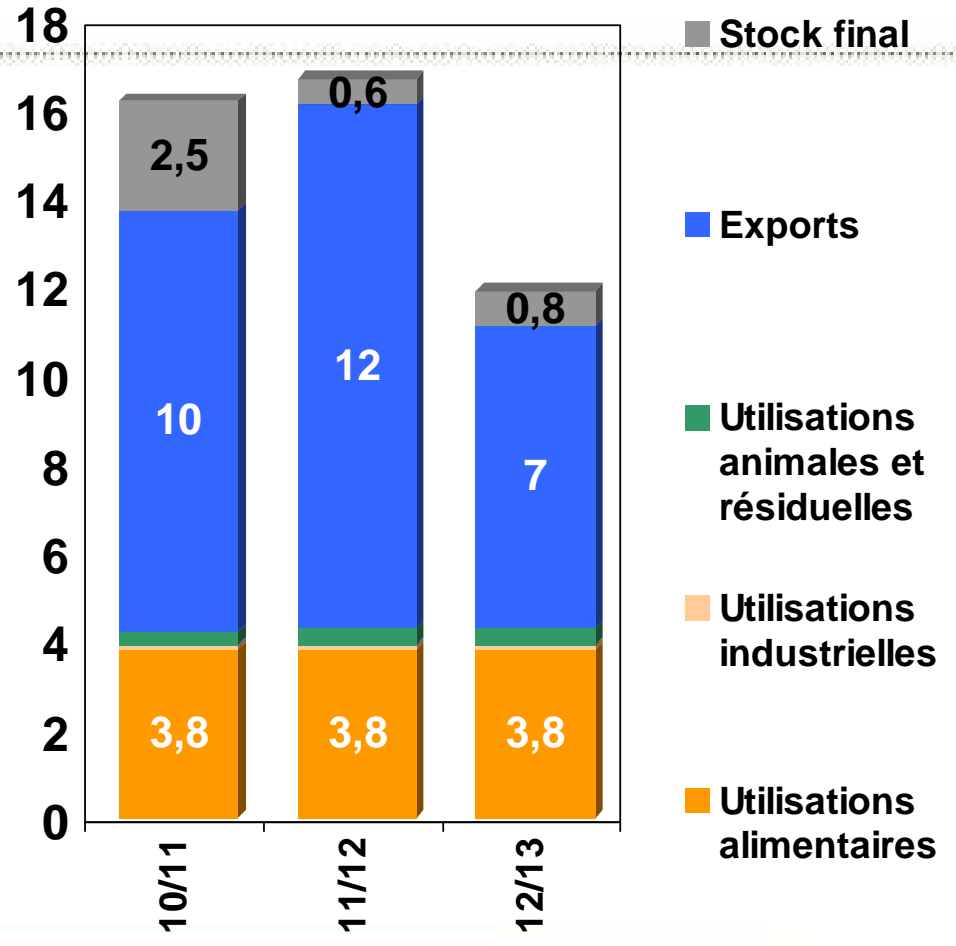
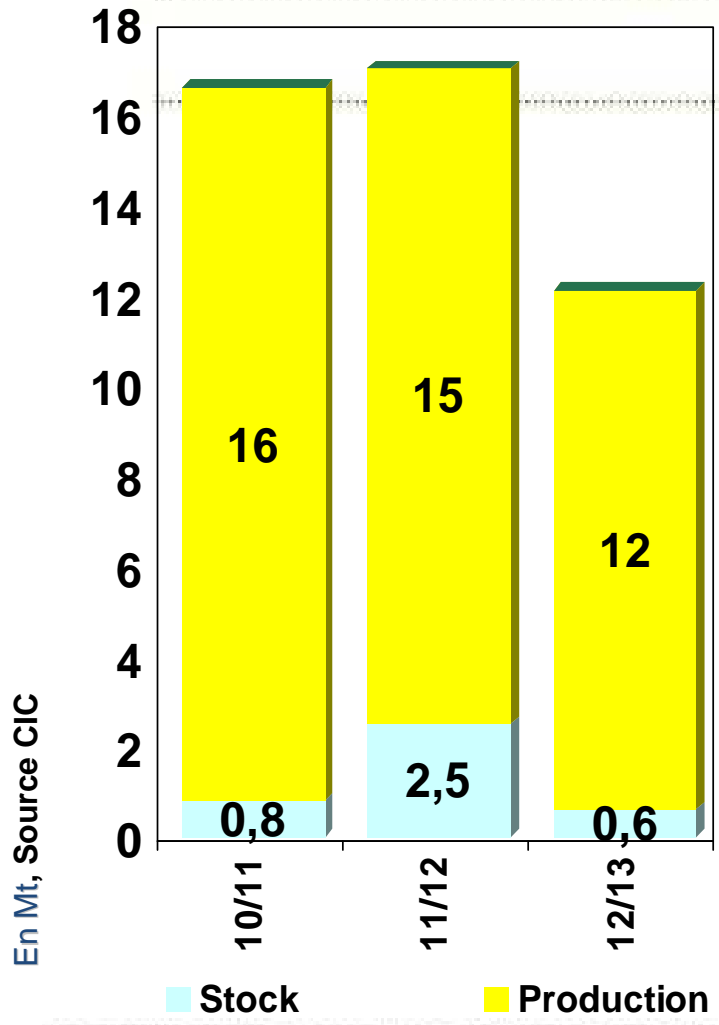
En Mt, Source CIC



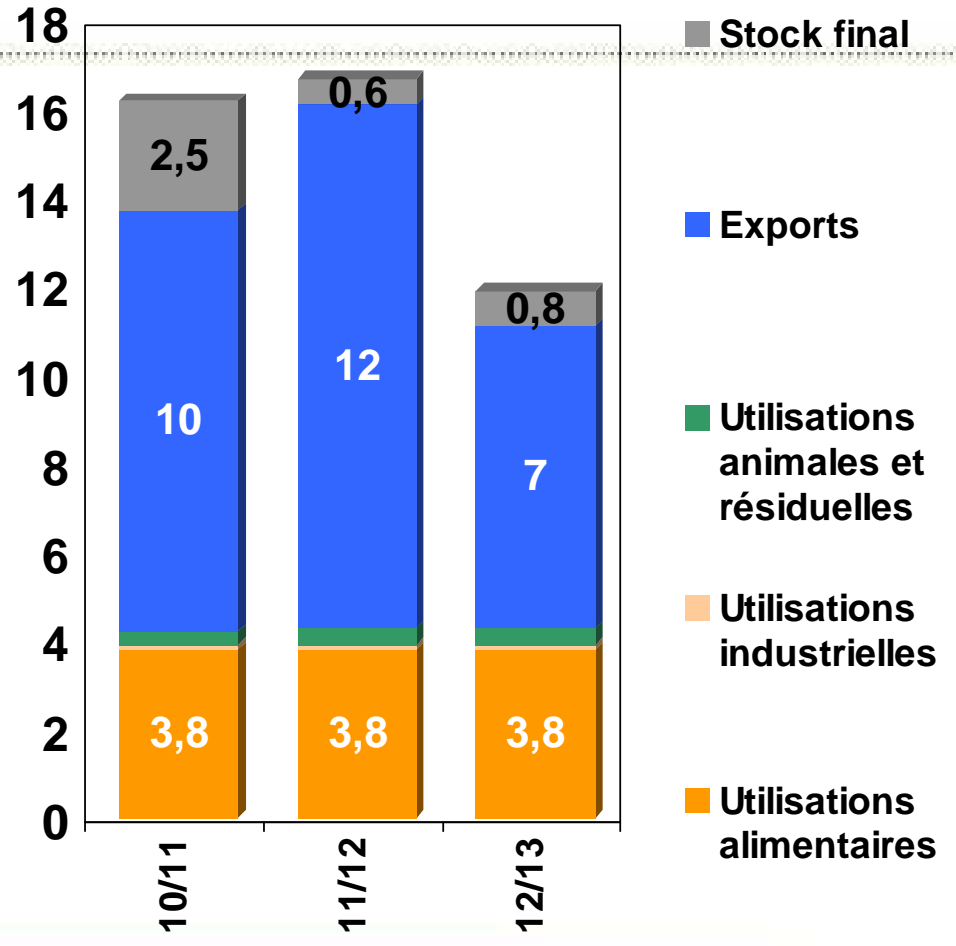
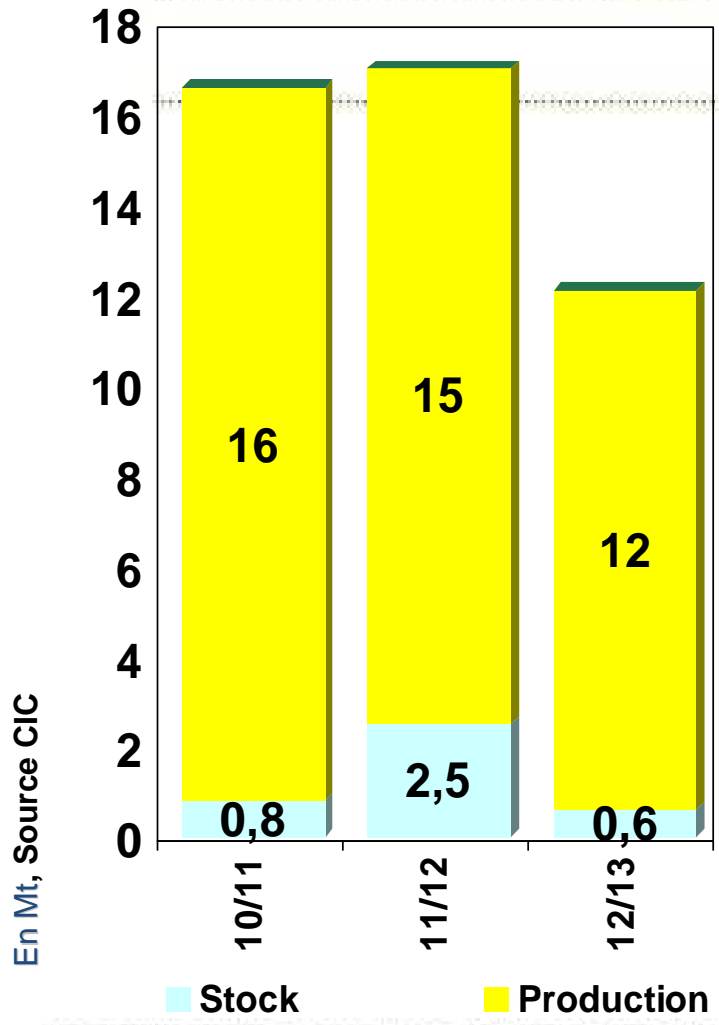
Blé américain : consommation animale



Argentine : bilan blé



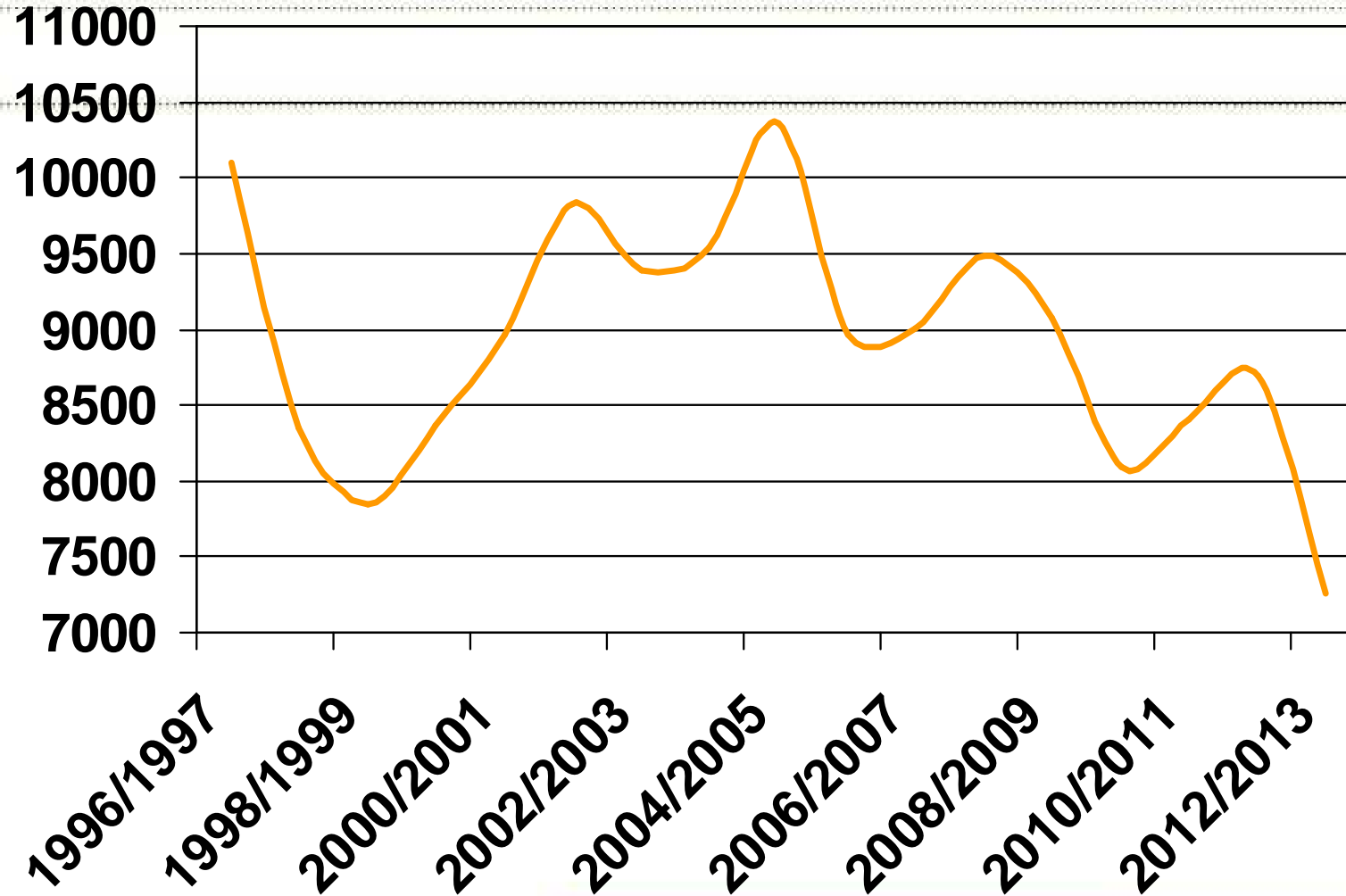
Argentine : bilan blé



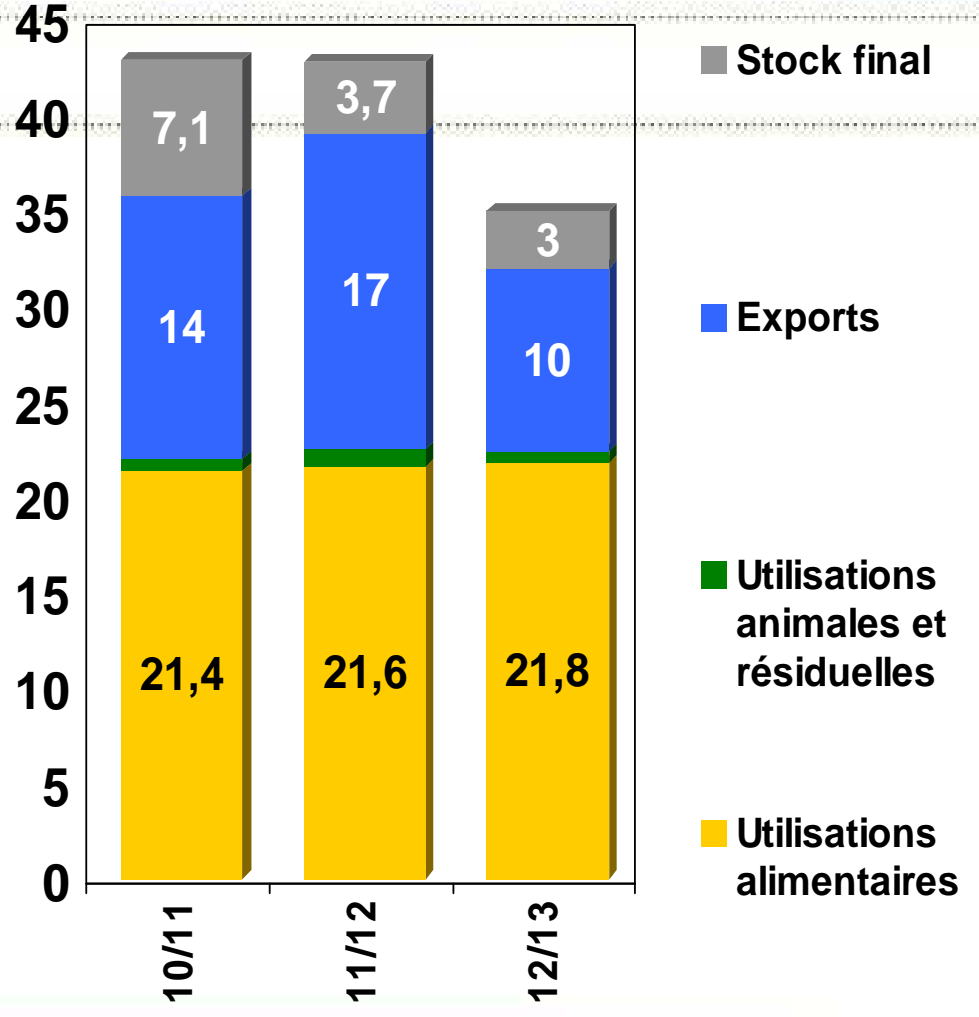
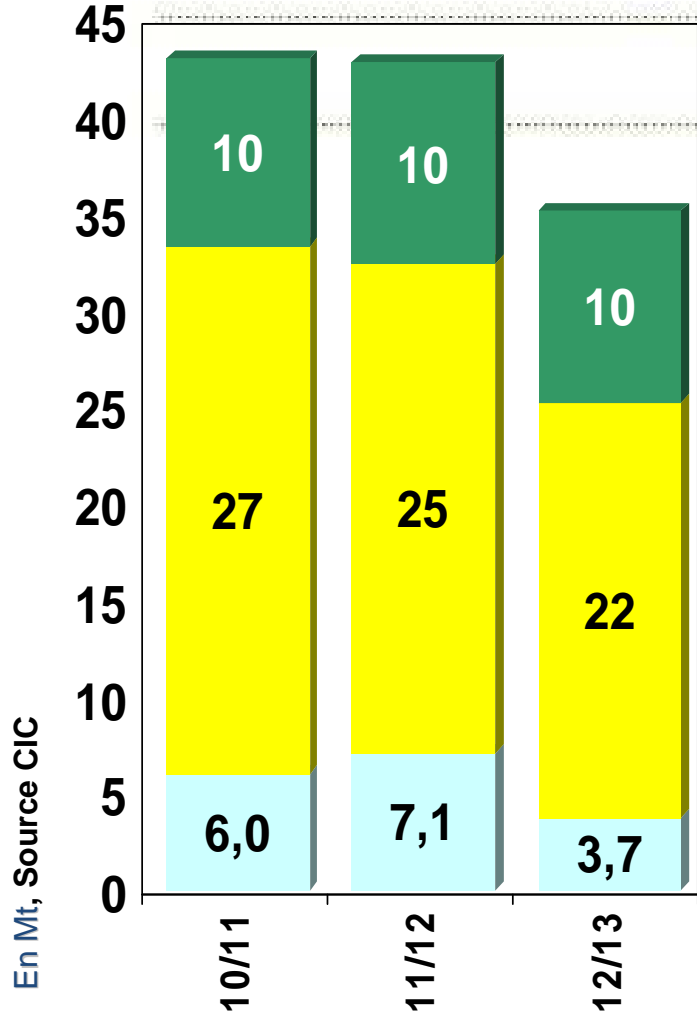


Surfaces dédiées au blé Mercosur

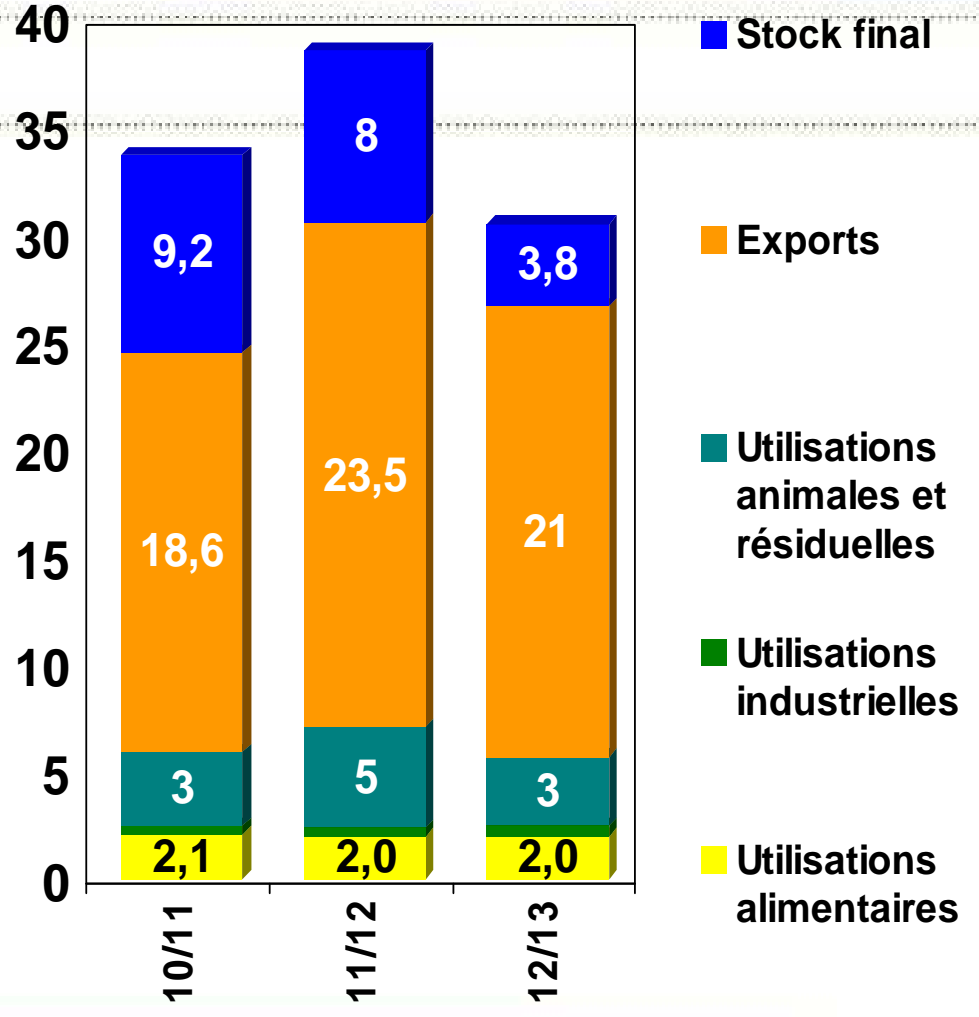
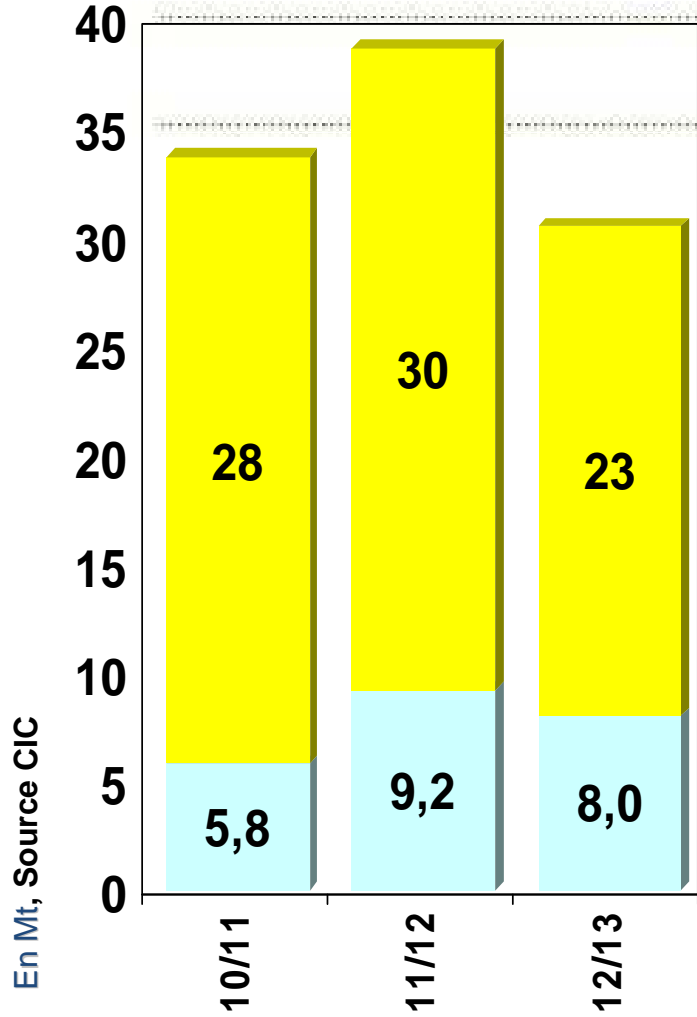
En 1 000 ha, source : USDA



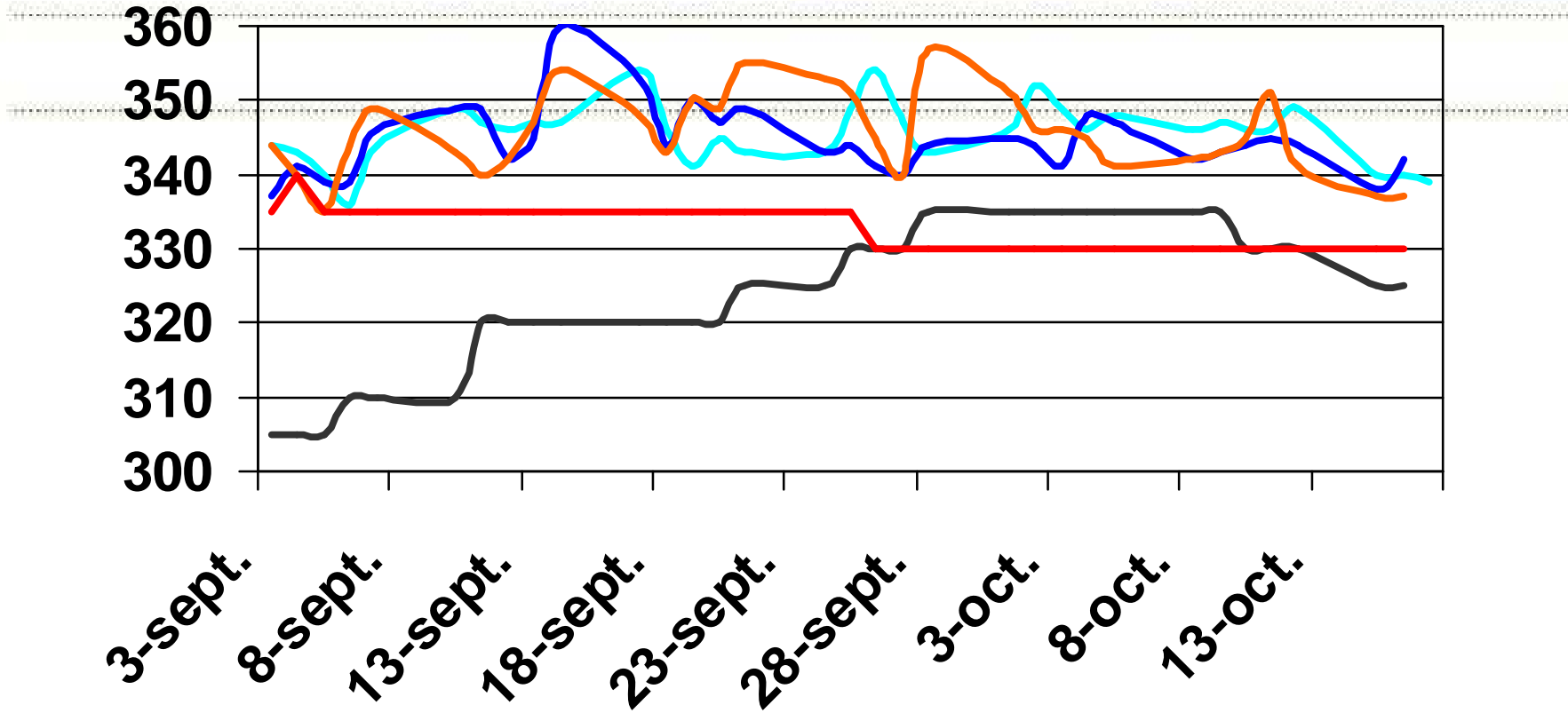
Mercosur : bilan blé



Australie : bilan blé



Cours du blé

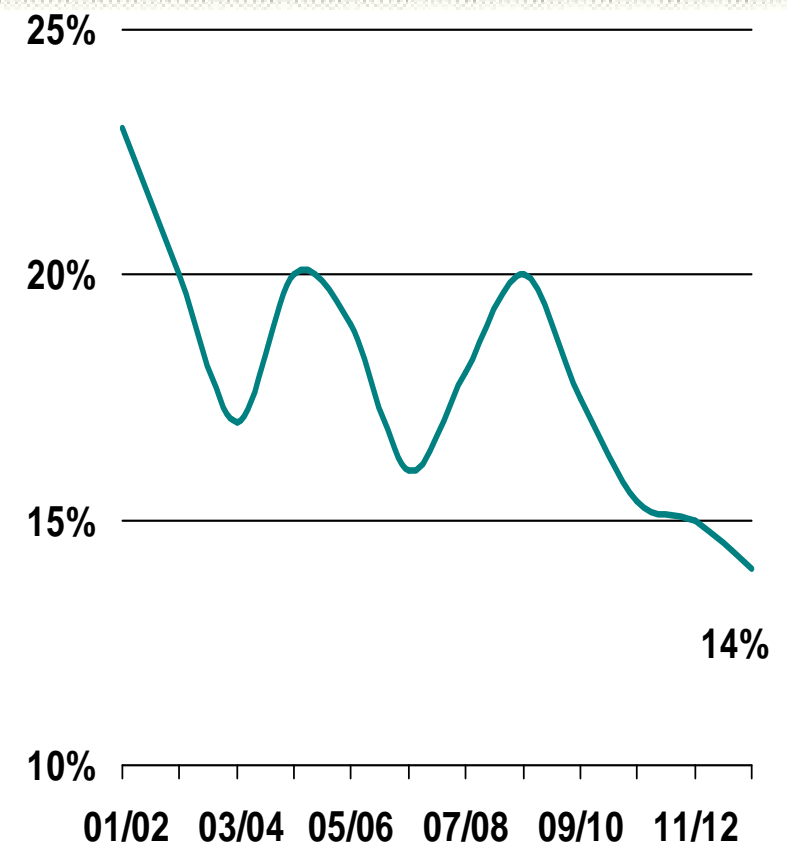
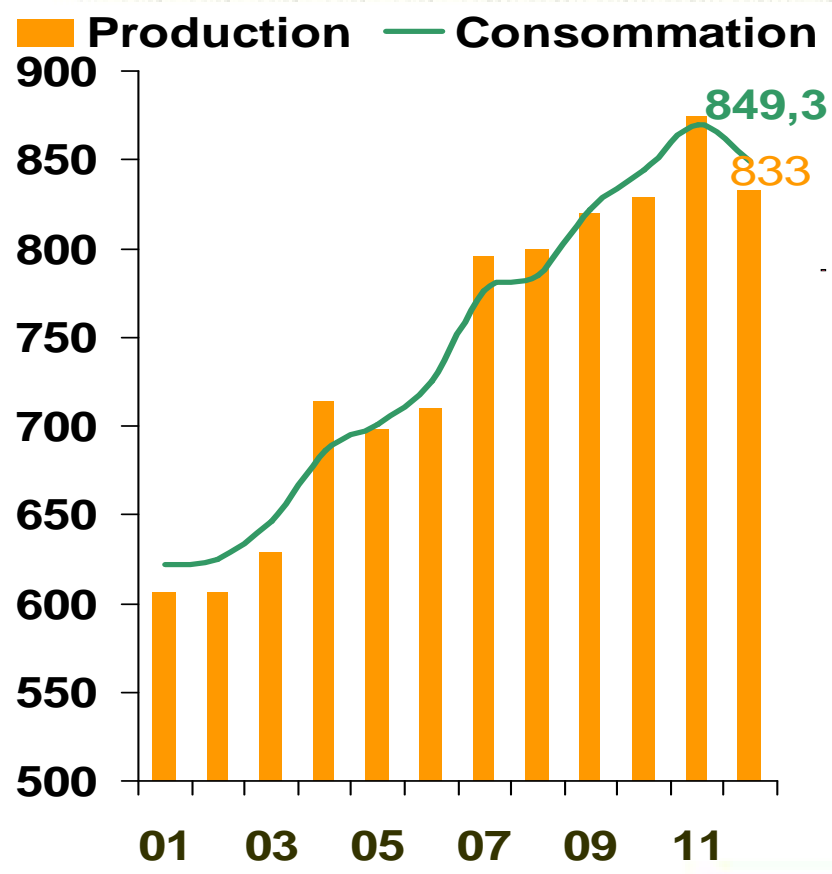


- Blé blanc Australie orientale
- Fob Rouen
- Fob Up river
- Fourrager mer Noire
- SRW fob



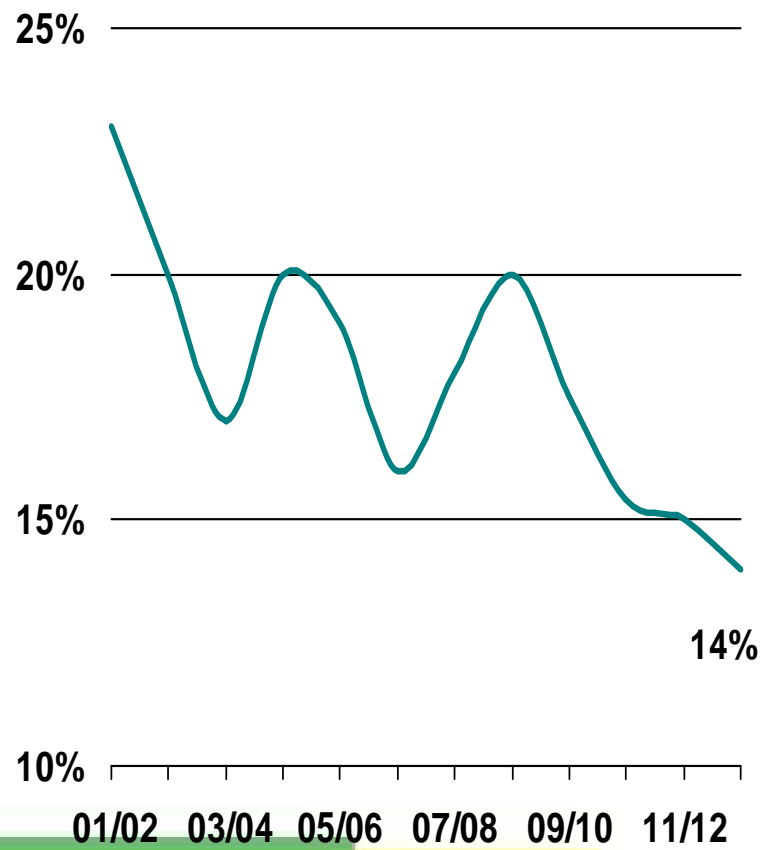
Bilan mondial du maïs 2012/13

Ratio stock sur consommation



Bilan mondial maïs 2012/13

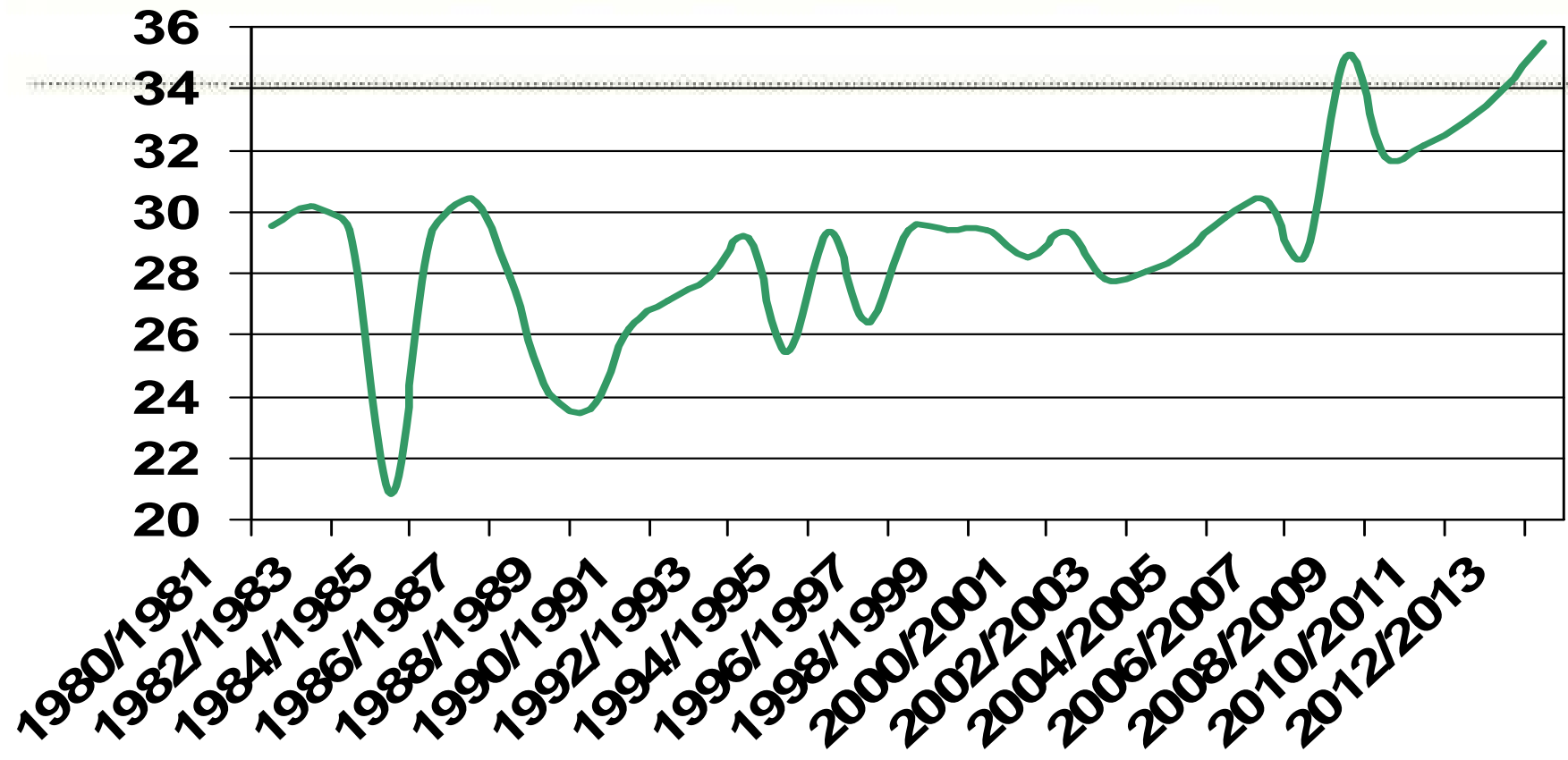
Ratio stock sur consommation



Source CIC

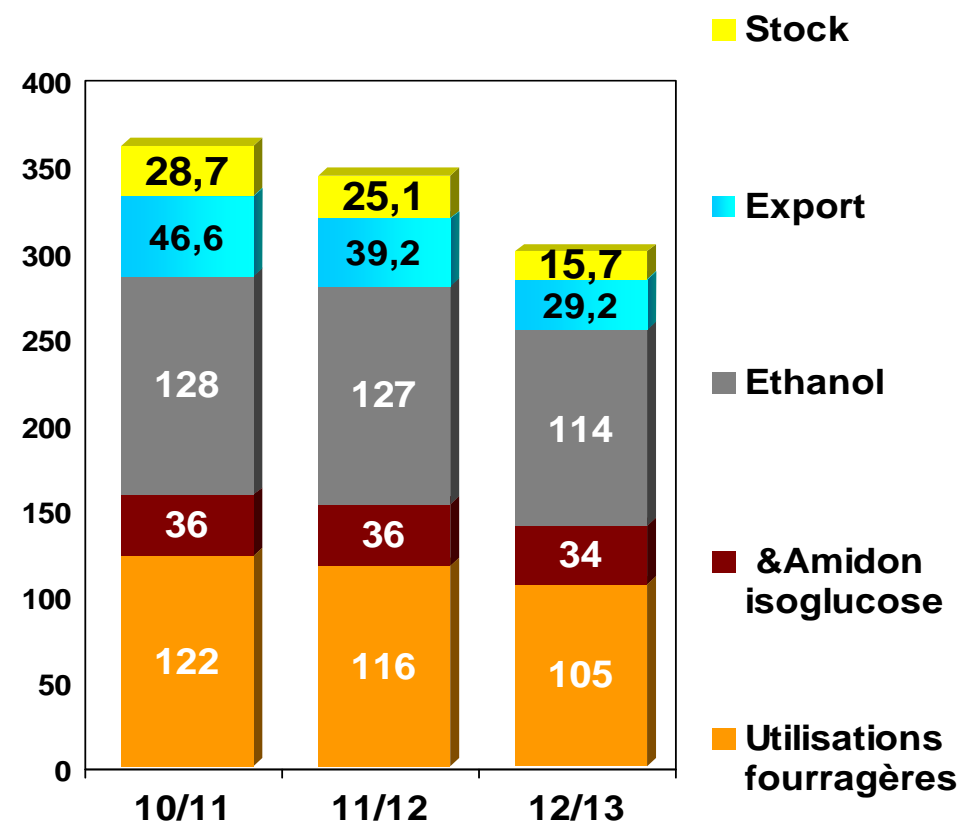
Surfaces de maïs récoltées aux Etats Unis

En Mha, source USDA

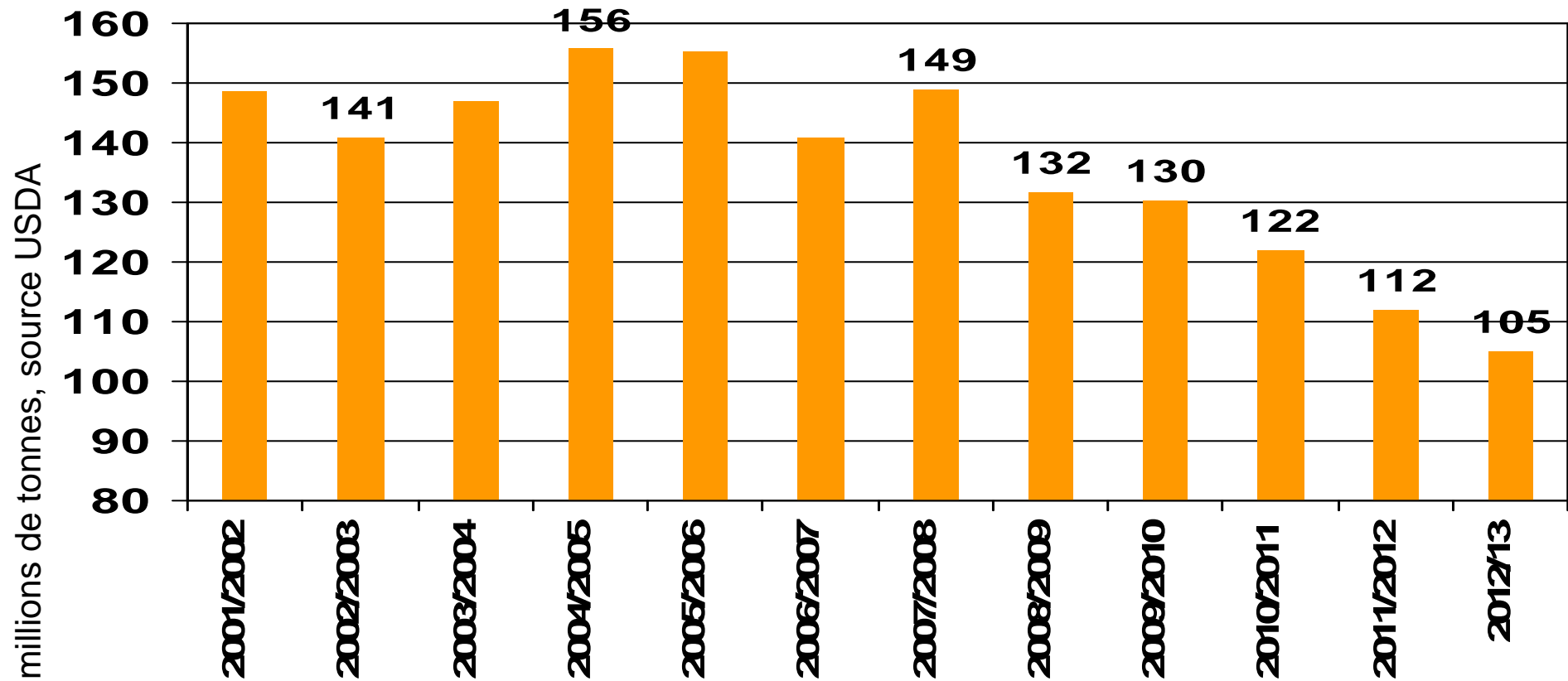


Etats-Unis, bilan maïs 2012/13 : un stock attendu de l'ordre de 16 Mt

Source USDA août 2012, En Mt

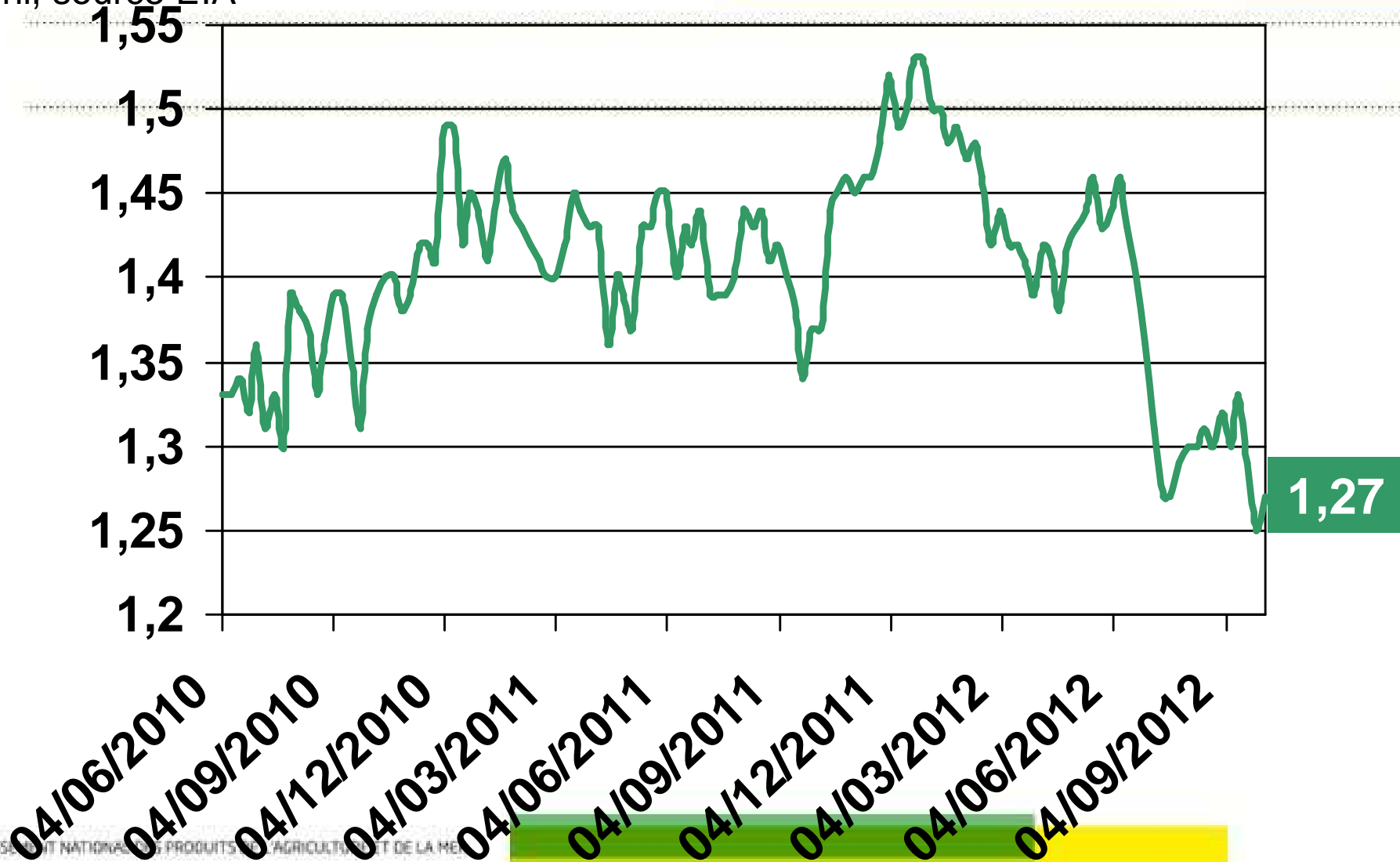


Mais américain : consommation animale



Production hebdomadaire d'éthanol aux Etats Unis

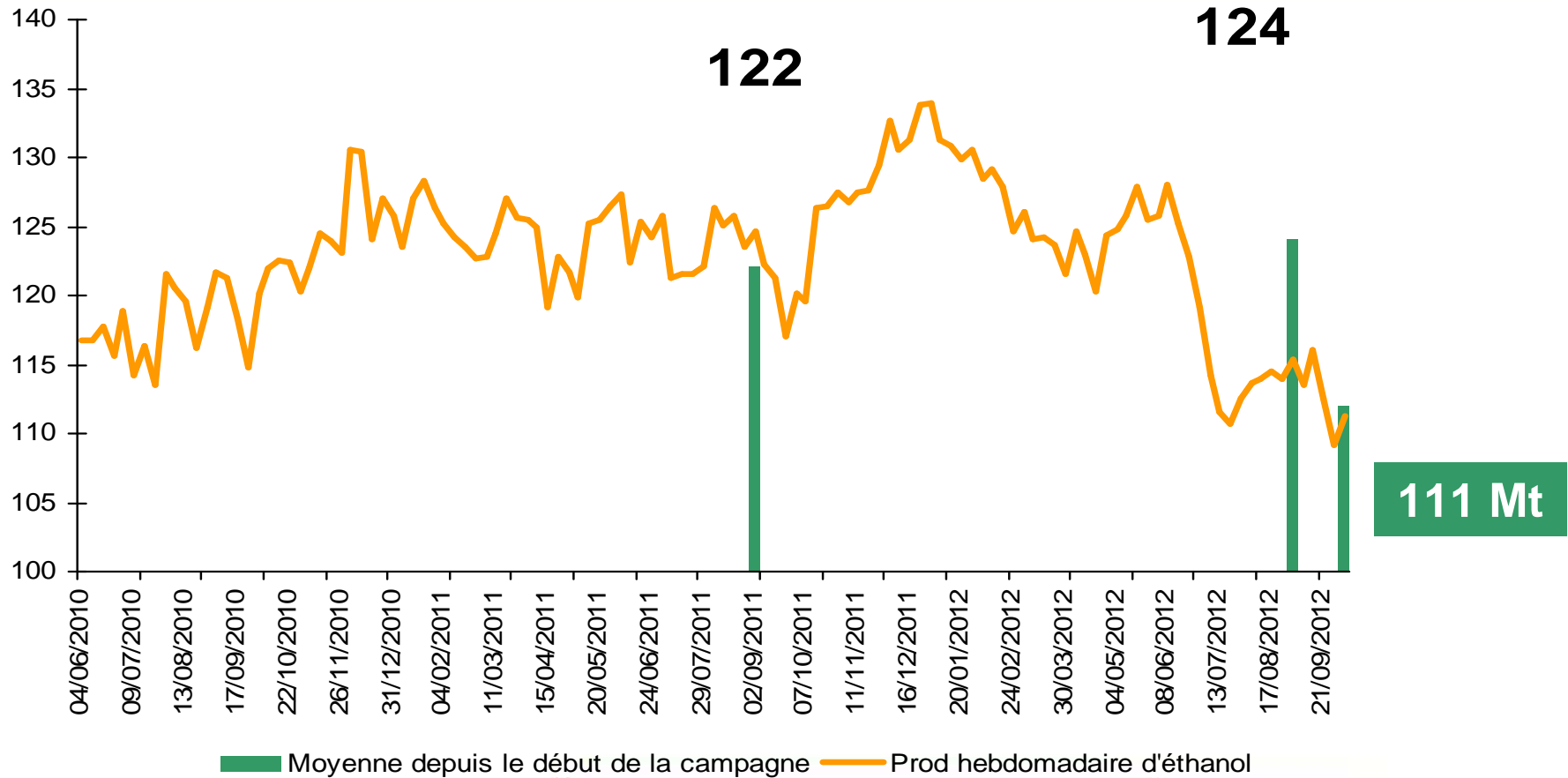
En Mhl, source EIA



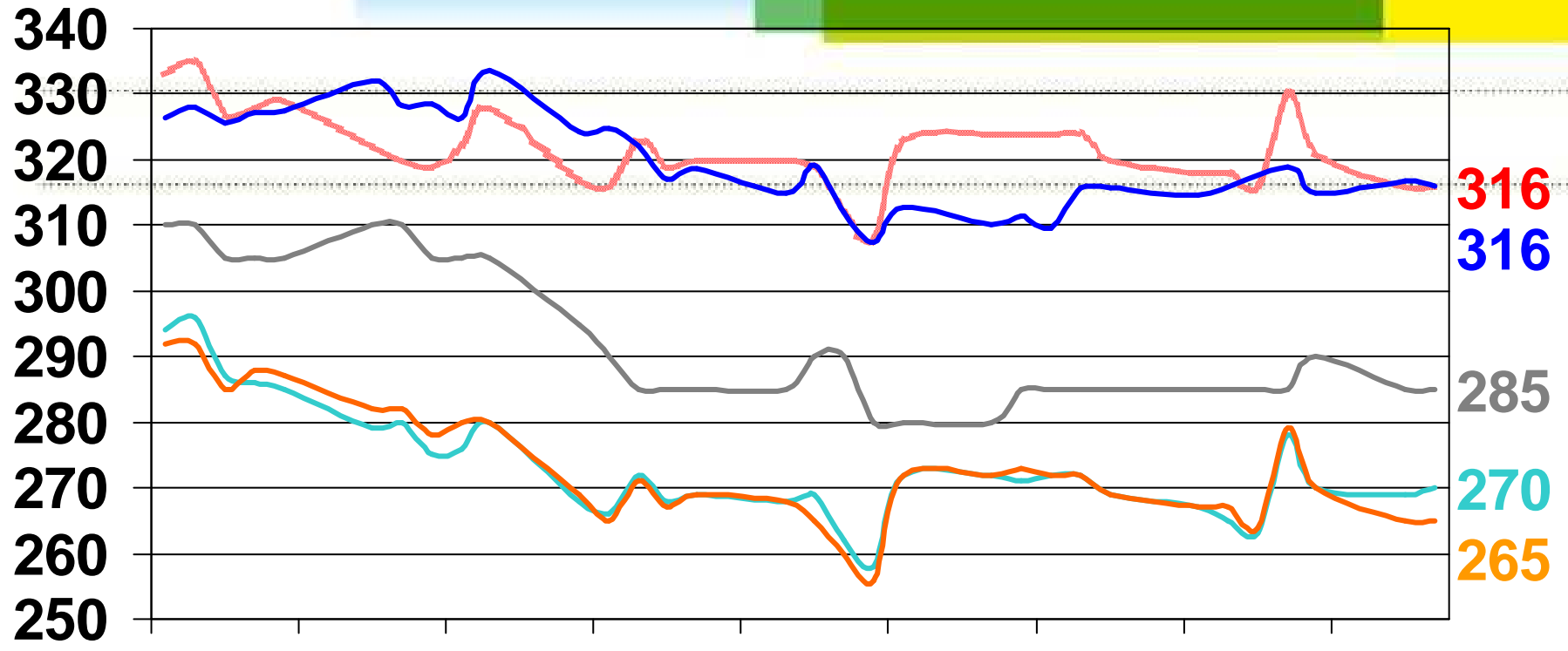
Equivalent tonnage annuel de maïs de la production hebdomadaire d'éthanol aux Etats Unis

Prévision USDA : 114 Mt

En Mt, calcul de FranceAgriMer



Cours du maïs

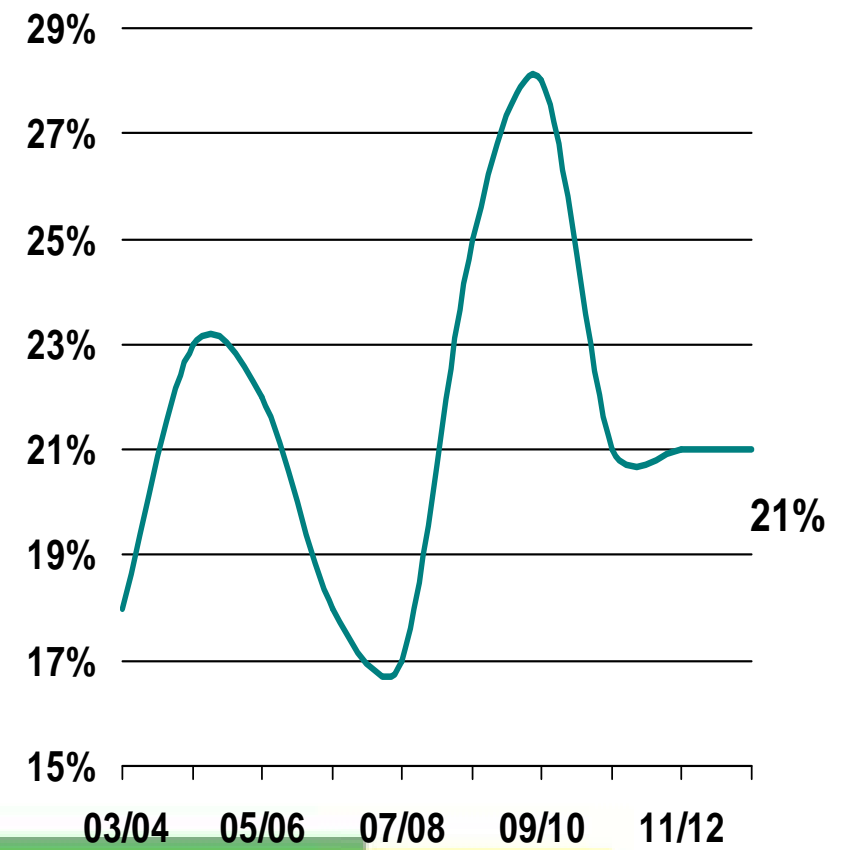
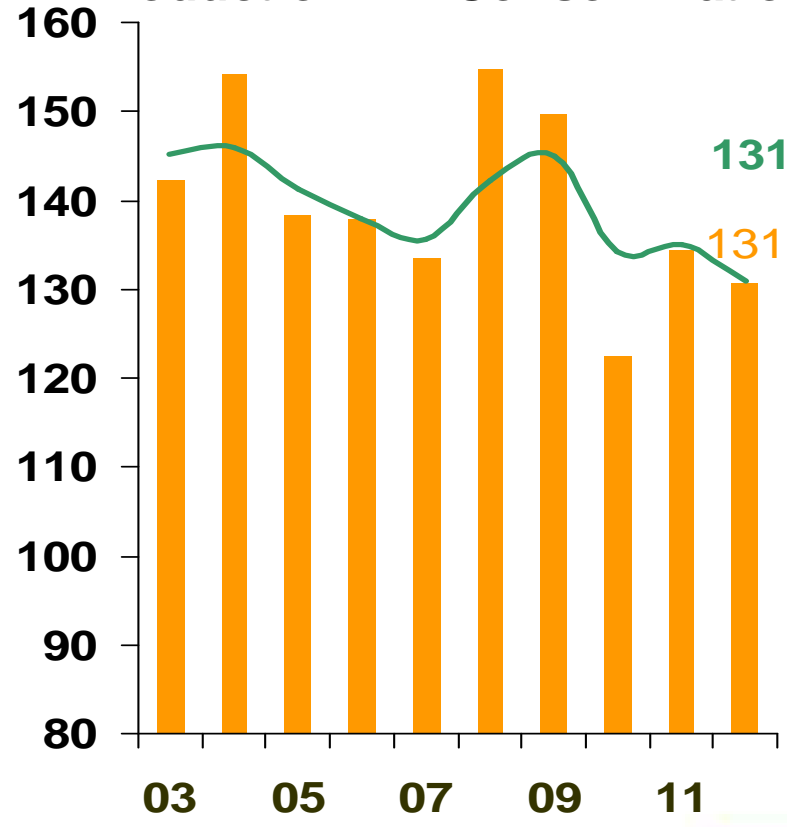


- Argentina Feed Up River — Black Sea Feed — Brazil feed Paranagaua
- US 3YC Gulf — Fob Bordeaux

Bilan mondial orge 2012/13

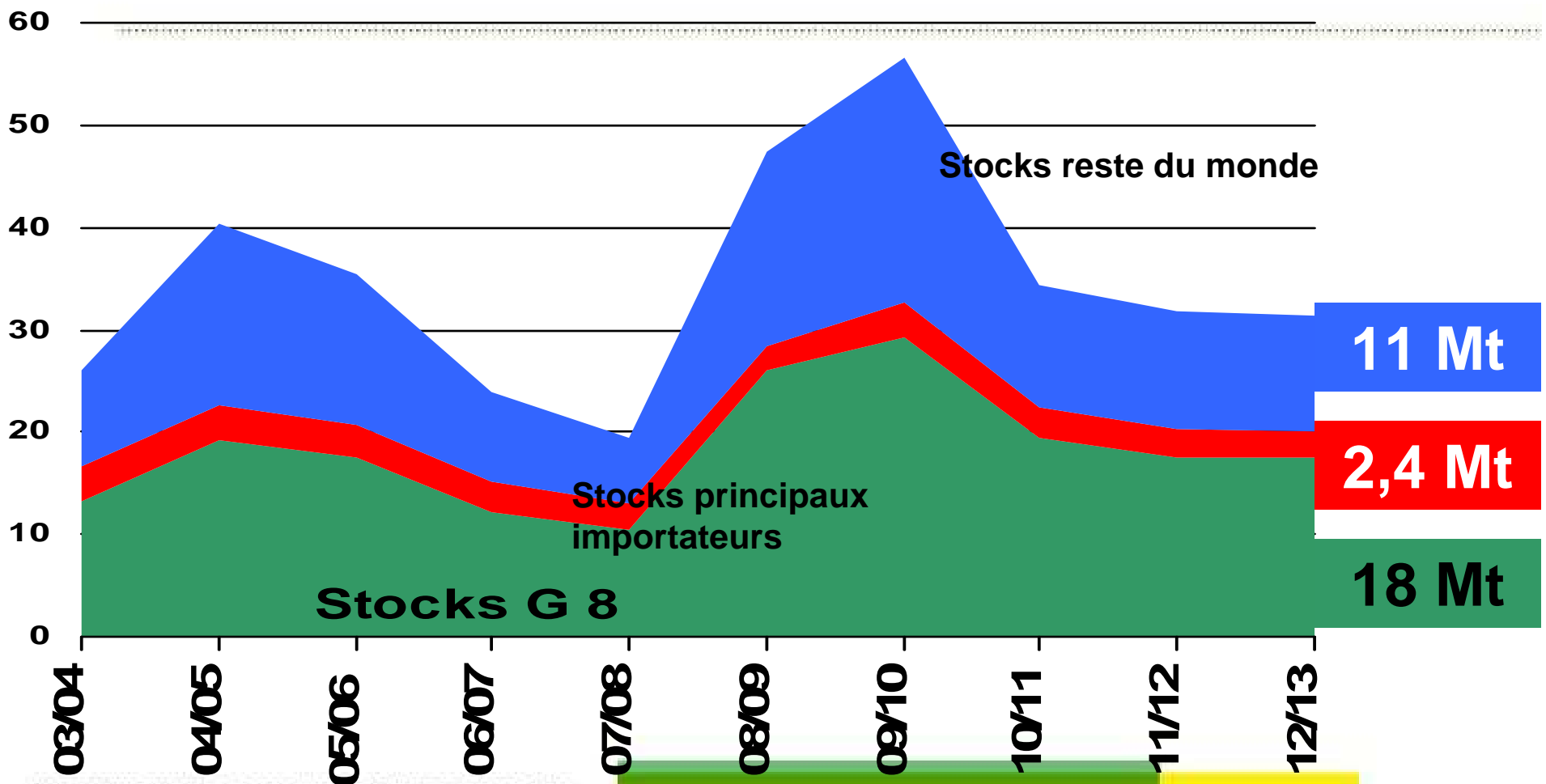
Ratio stock sur consommation

Production — **Consommation**

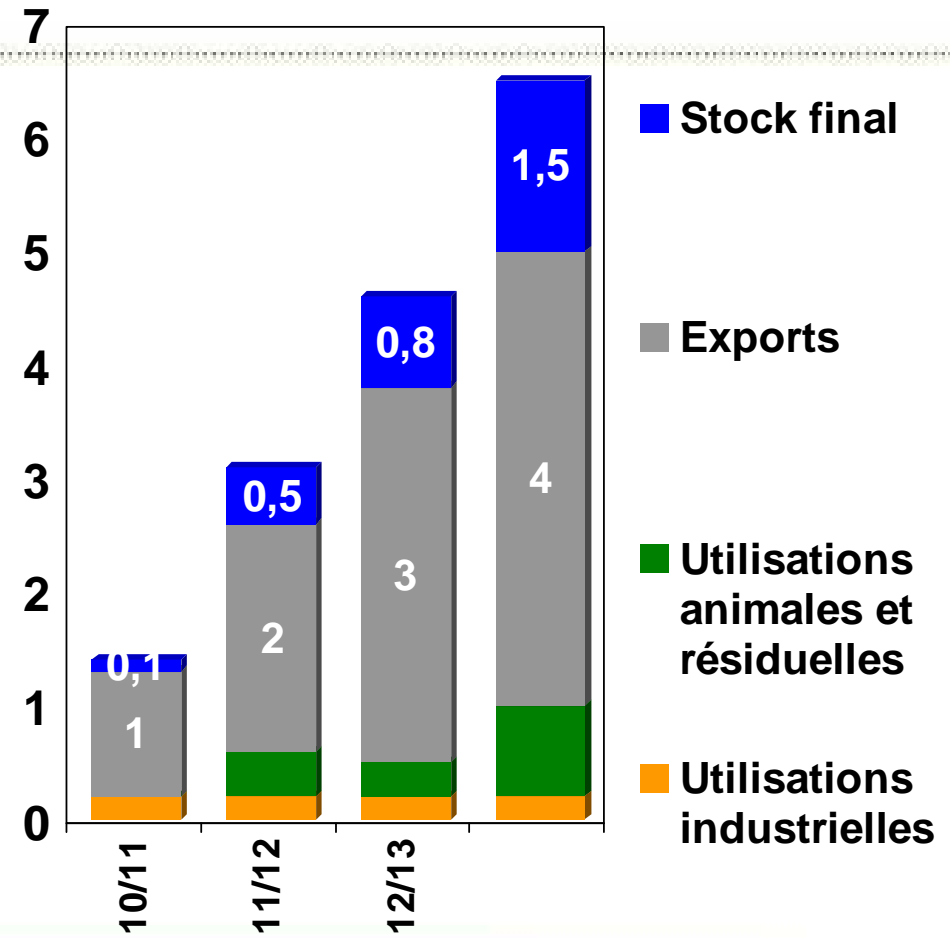
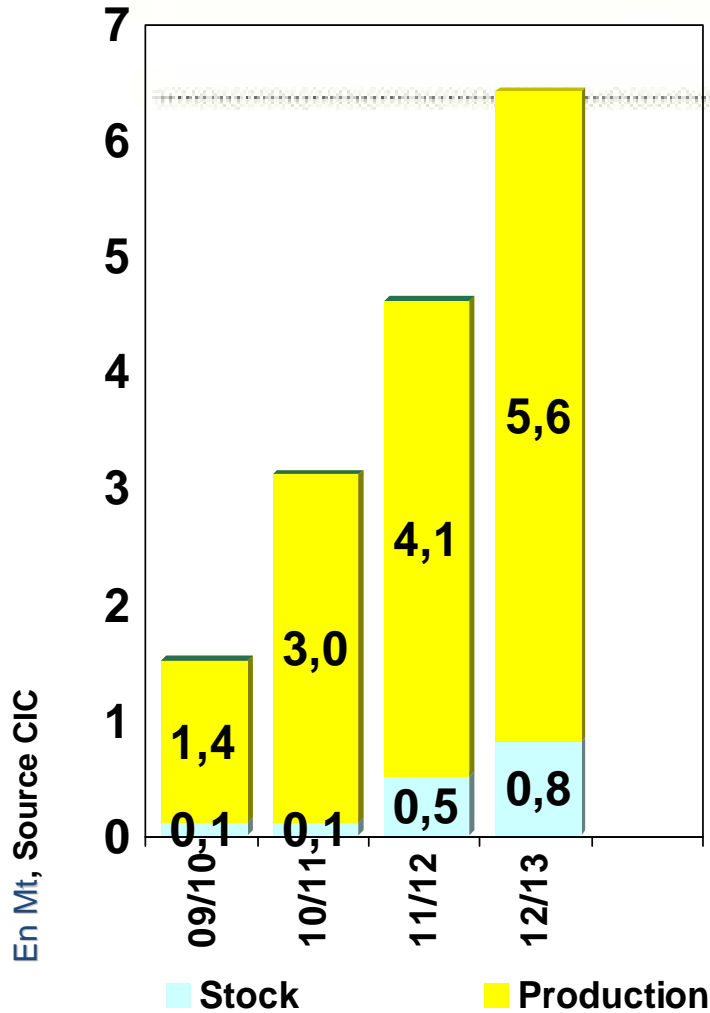


Répartition des stocks mondiaux d'orge en 2012/13

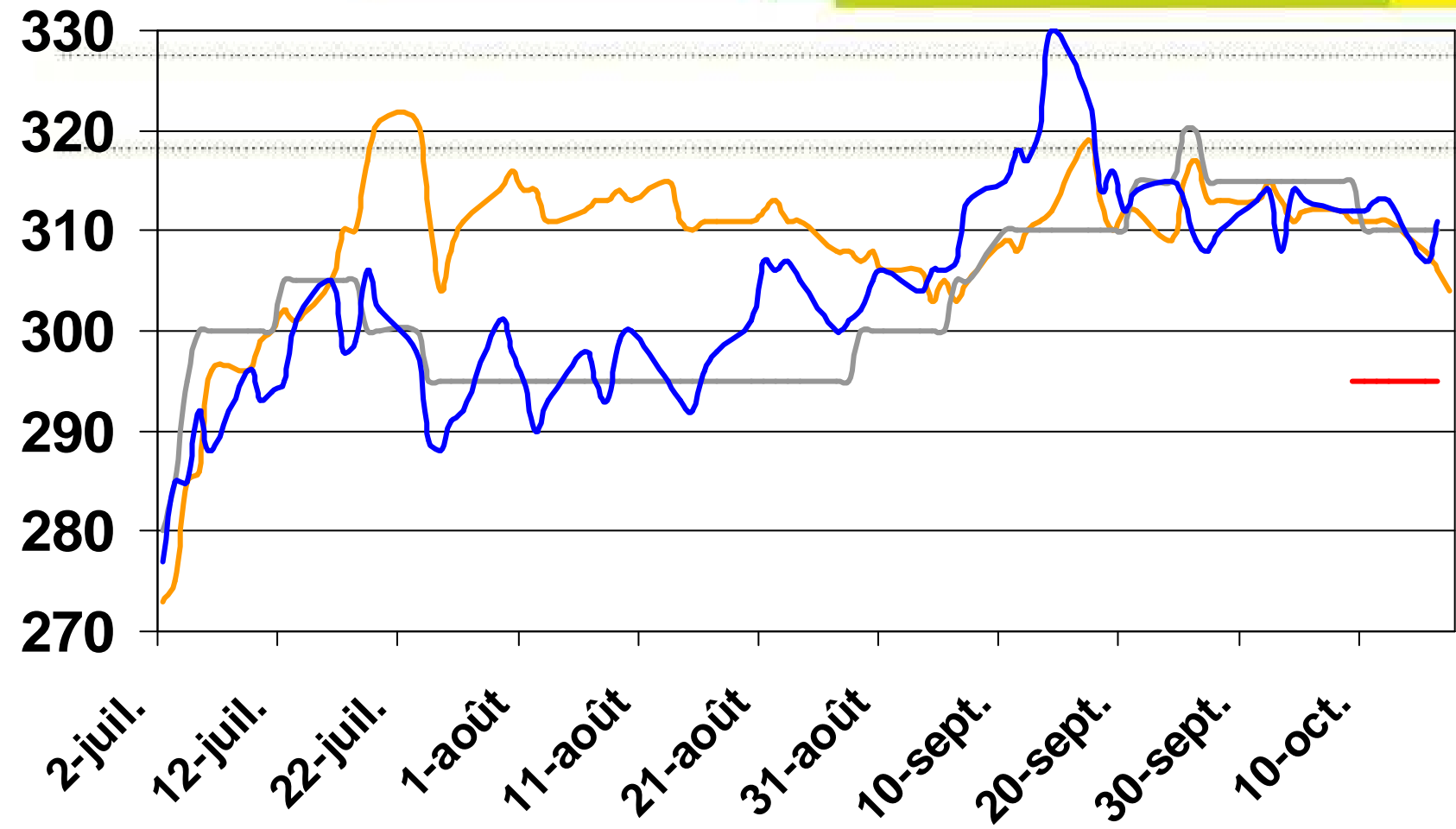
En Mt, Source CIC



Argentine : bilan orge



Cours de l'orge

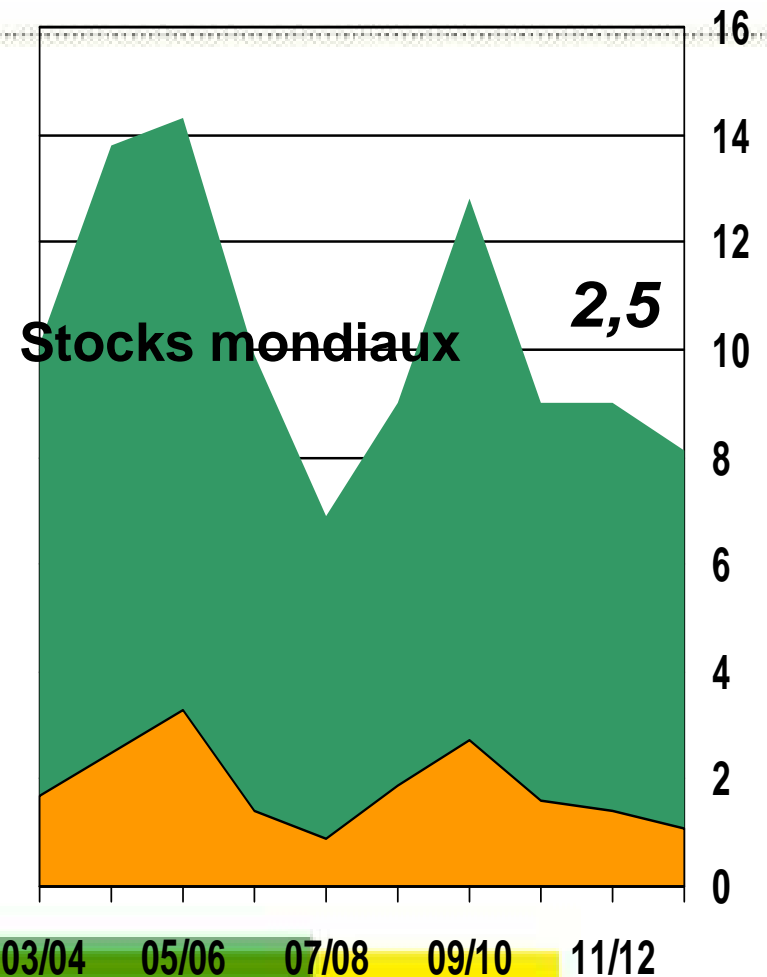
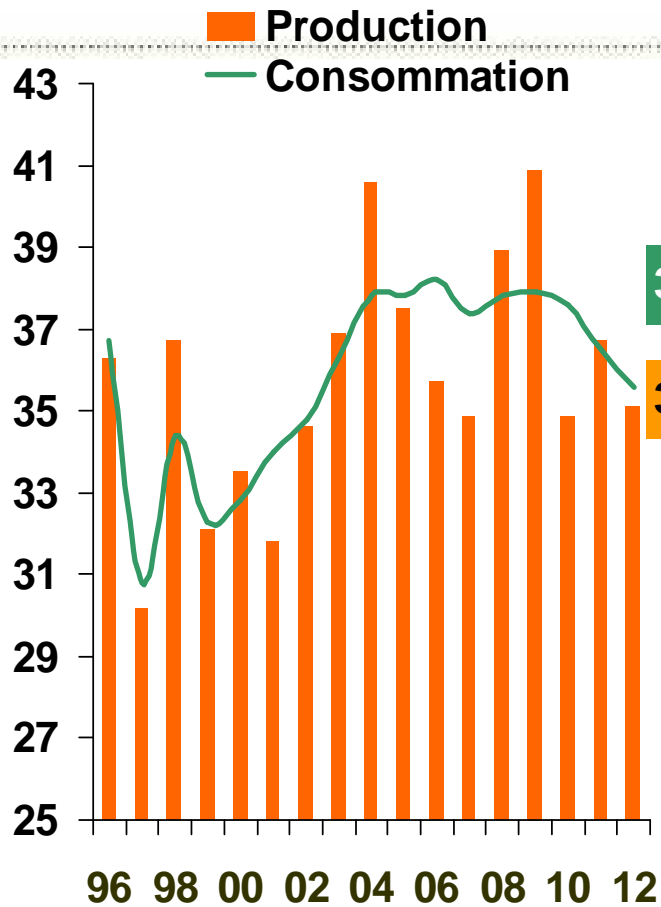


— Australia Feed — Black Sea Feed — France Feed Rouen — Fob Upriver

Bilan mondial blé dur 12/13

(En Mt) Source CIC 28/09/2012

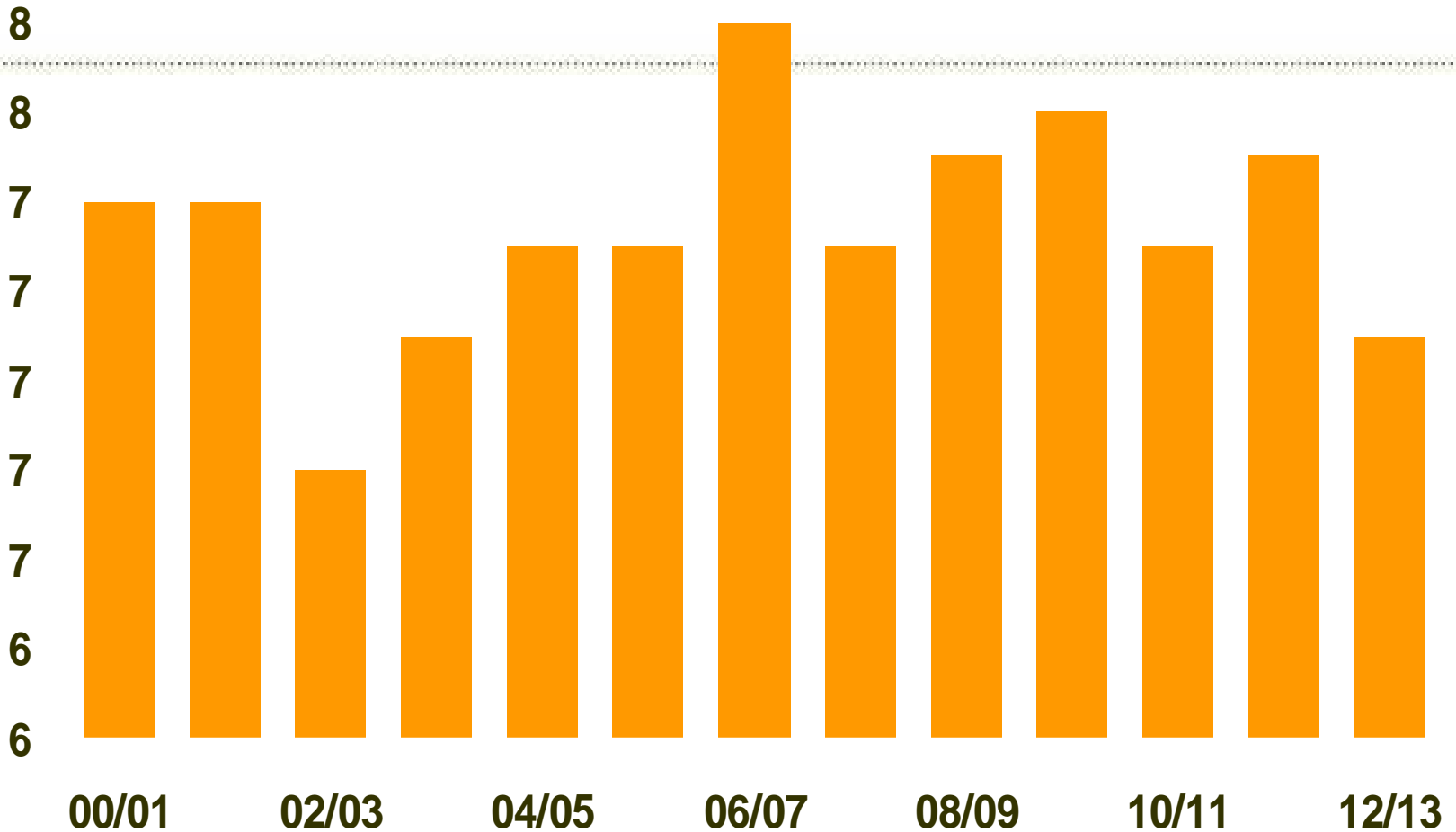
Stocks mondiaux



Commerce mondial du blé dur

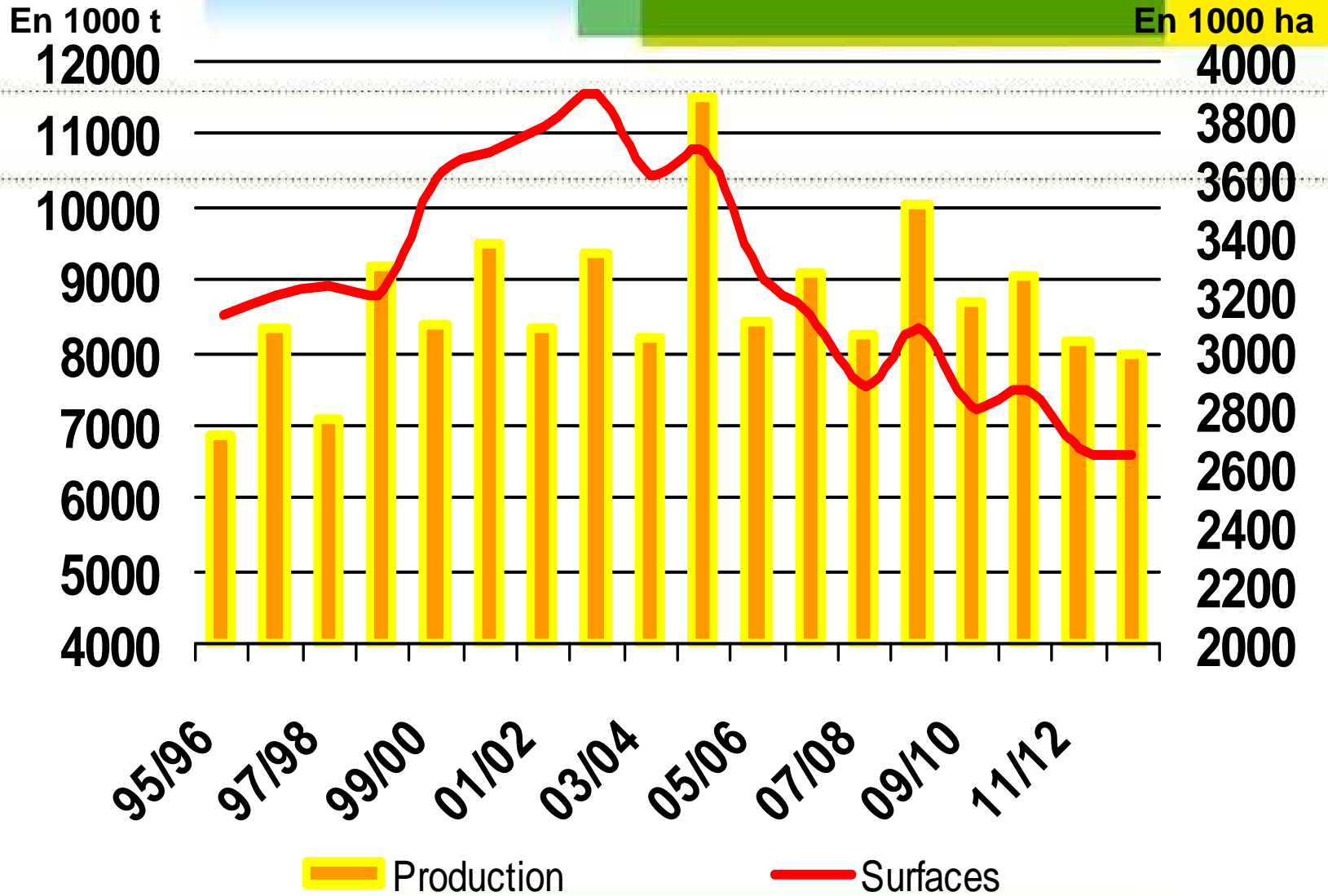
Source CIC 28/09/2012

(1000 t)



Surfaces et production dans l'UE

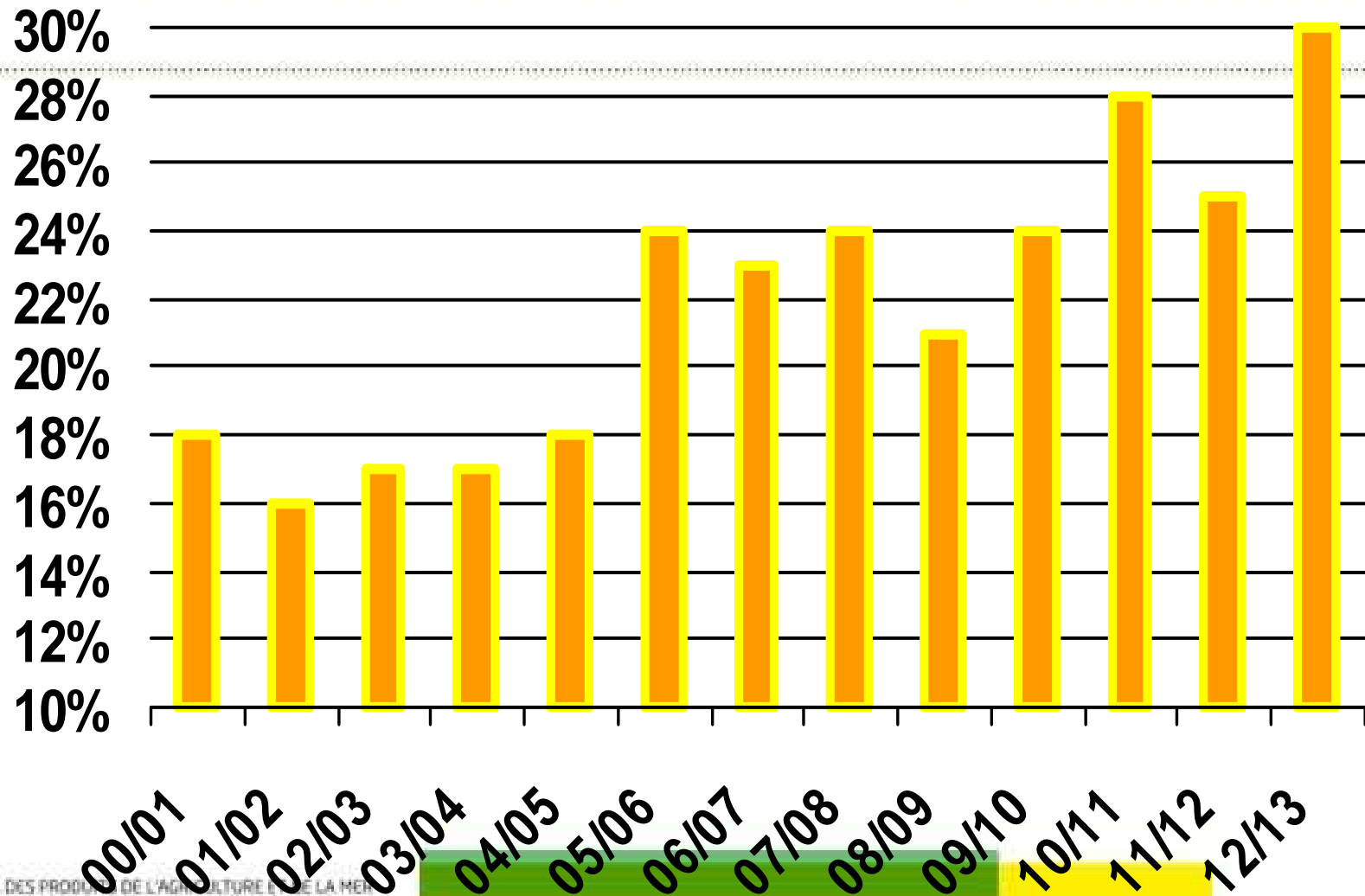
Source : CIC et FranceAgriMer





Part de la France dans la production européenne

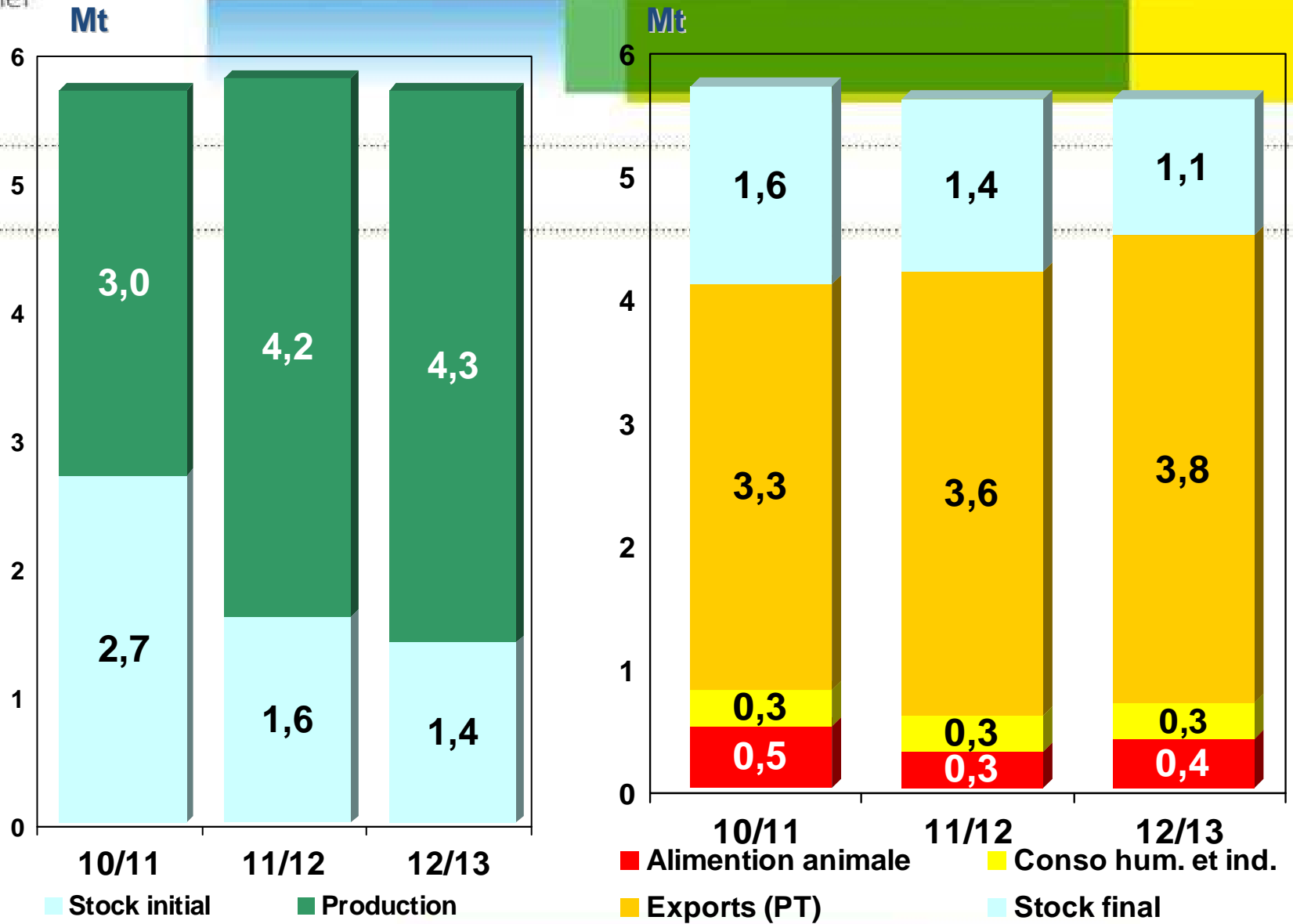
Source : CIC et FranceAgriMer





FranceAgriMer

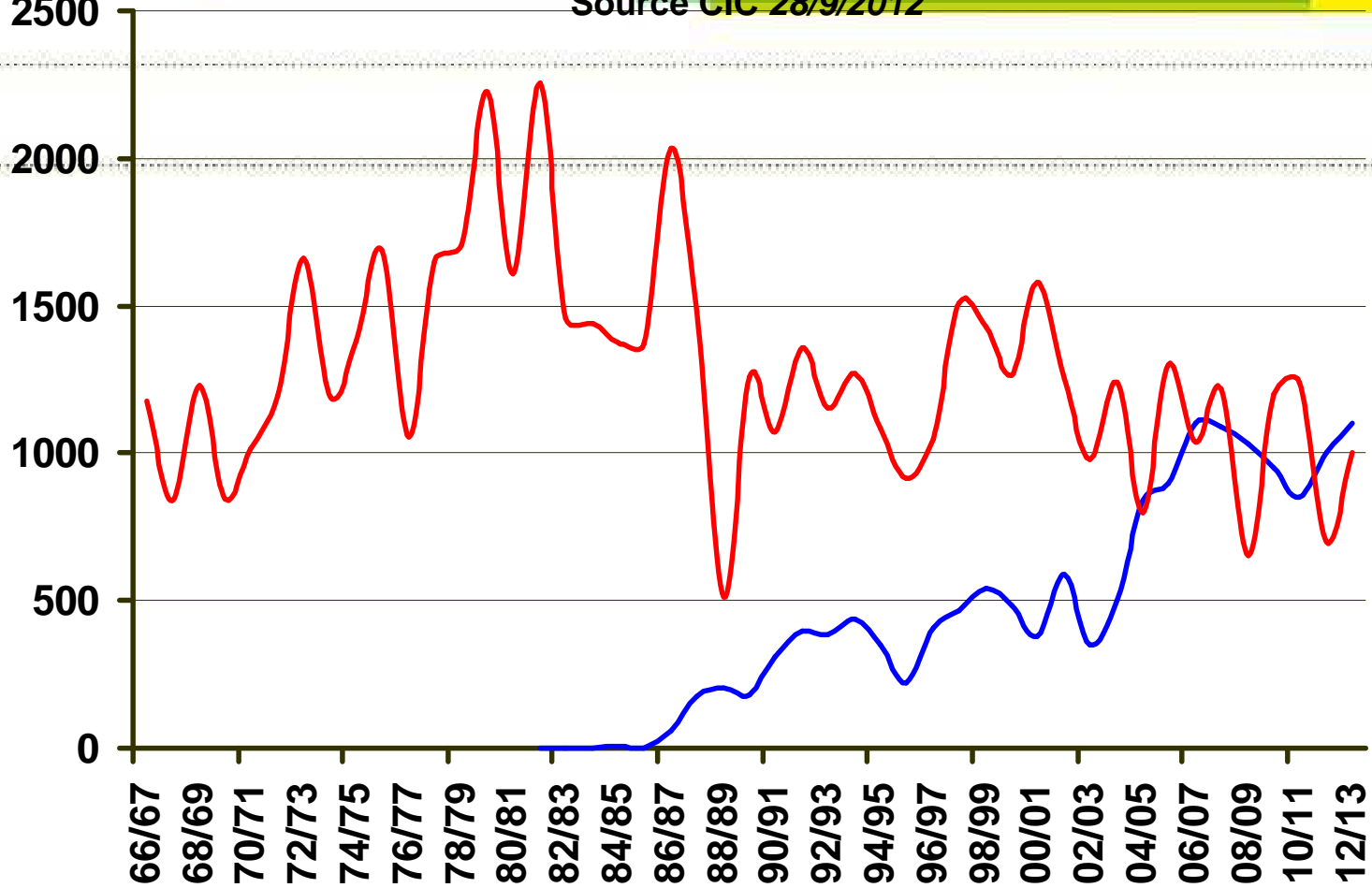
Canada : bilan blé dur 2012/13



importations exportations de blé dur des États-Unis

en 1000 t
2500

Source CIC 28/9/2012

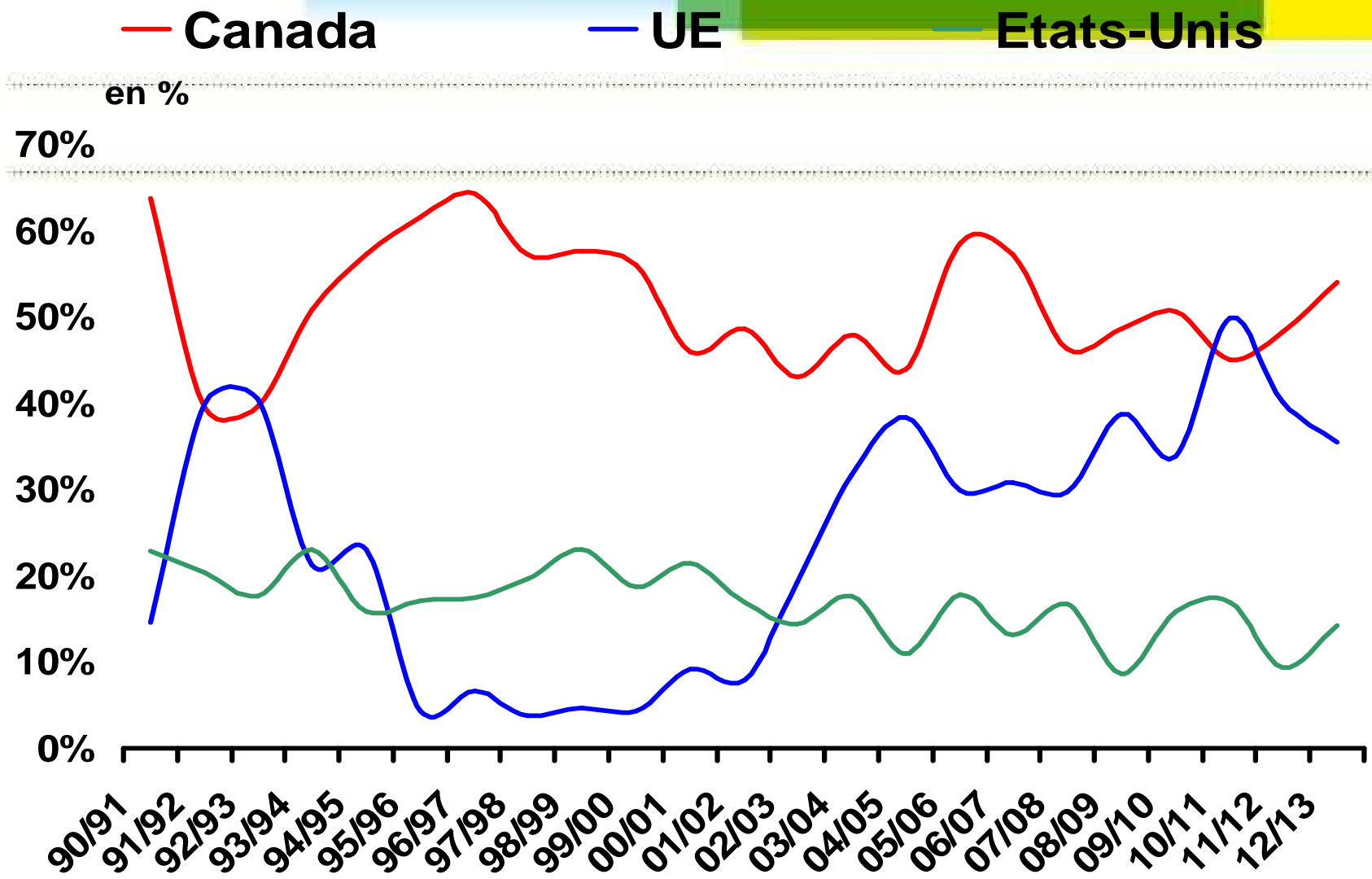


— USA Imports

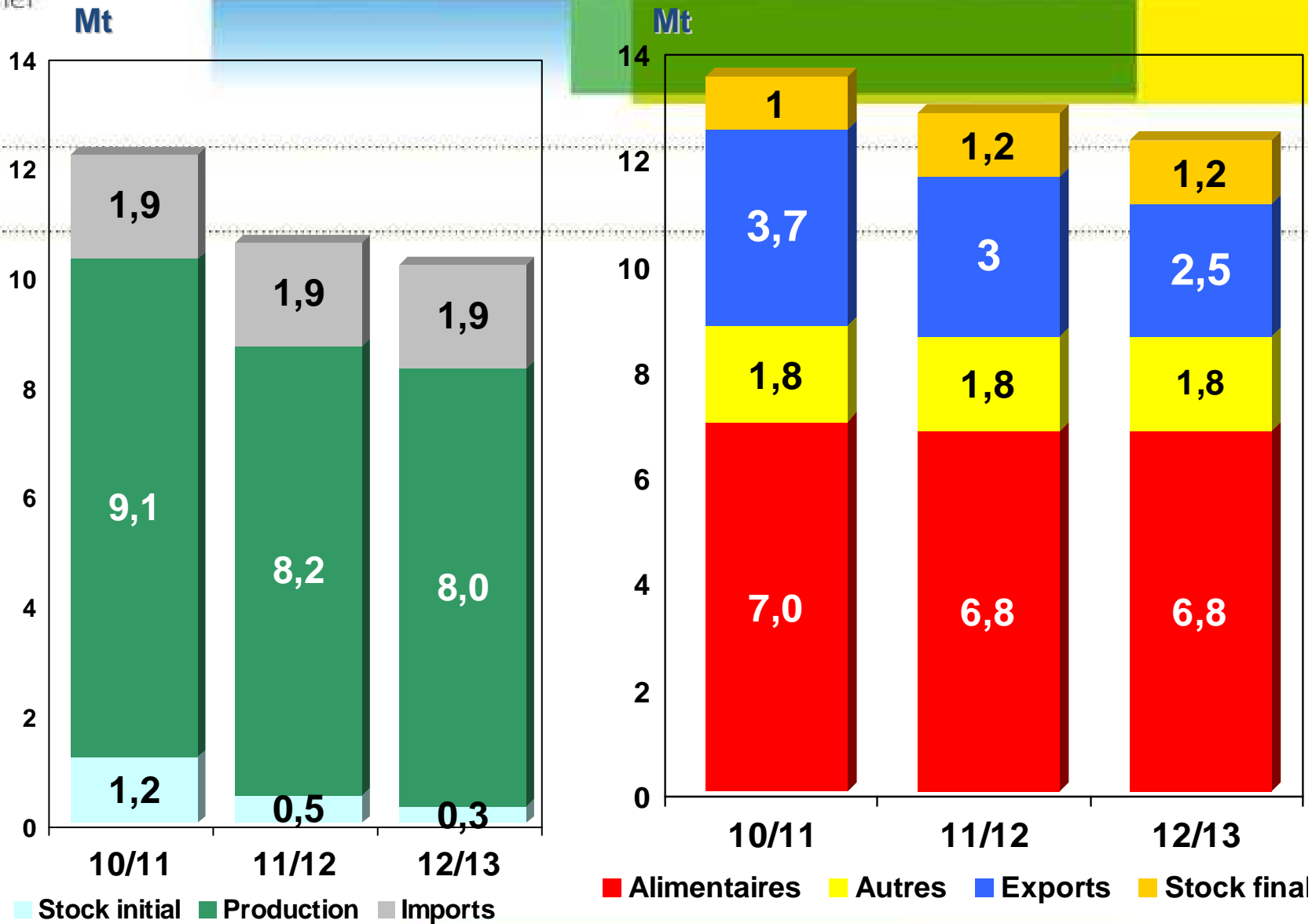
— USA Exports

Parts de marché

Source CIC 28/09/2012



UE 27 : bilan blé dur 2012/13



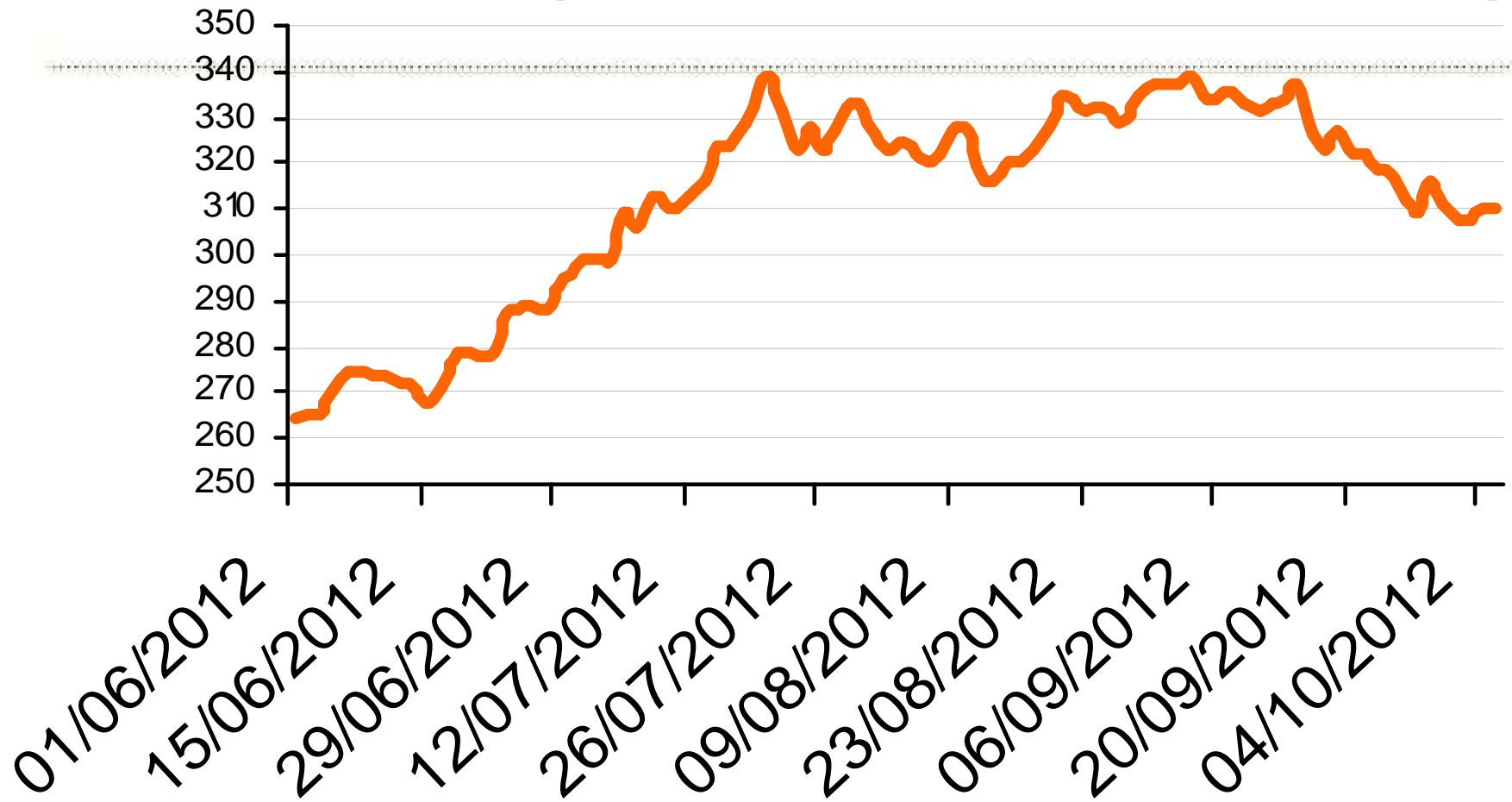
Besoin des pays méditerranéens et européens en blé dur 2012/13 (*en Mt*)

En Mt, source CIC et FranceAgriMer

	2011/12	2012/13	2012/13 Bis
UE	1,8	1,9	1,9
Algérie	1,8	1,3	<u>1,5</u>
Maroc	0,7	0,9	0,9
Tunisie	0,5	0,5	0,5
Total	4,8	4,6	4,8

Indice CIC - GOI (Grains and Oilseeds Index)

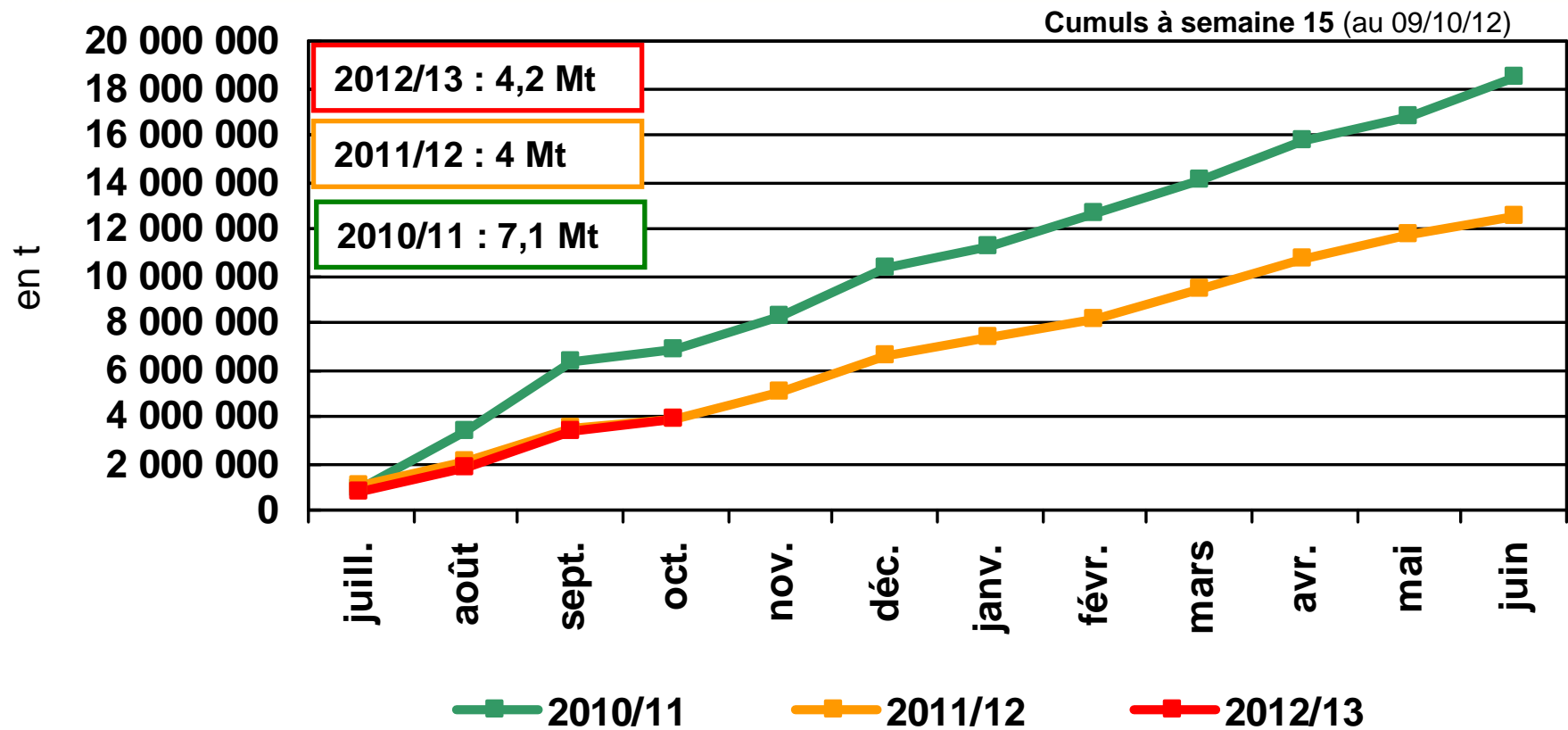
Source : CIC-indice 100 janvier 2000





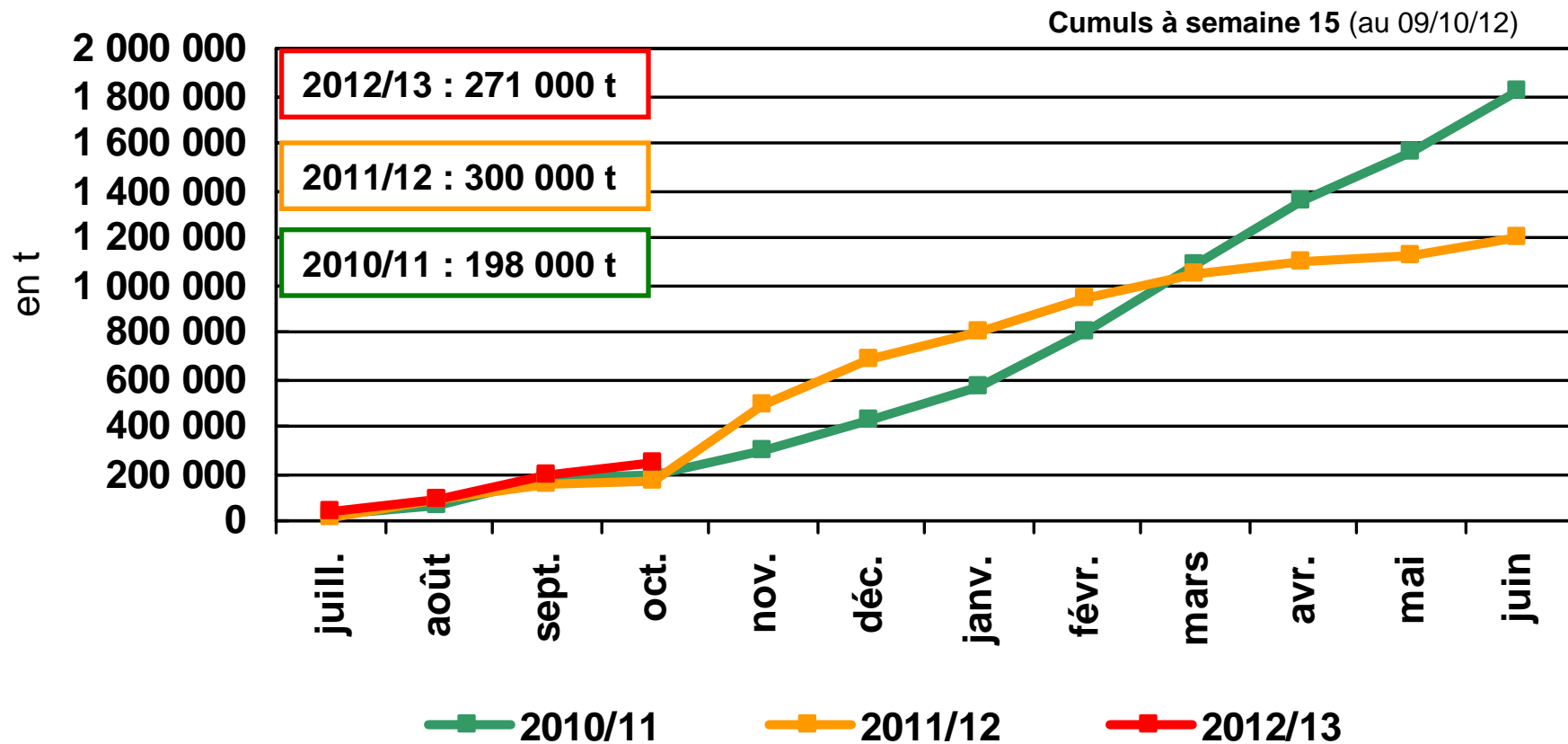
Marché européen

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



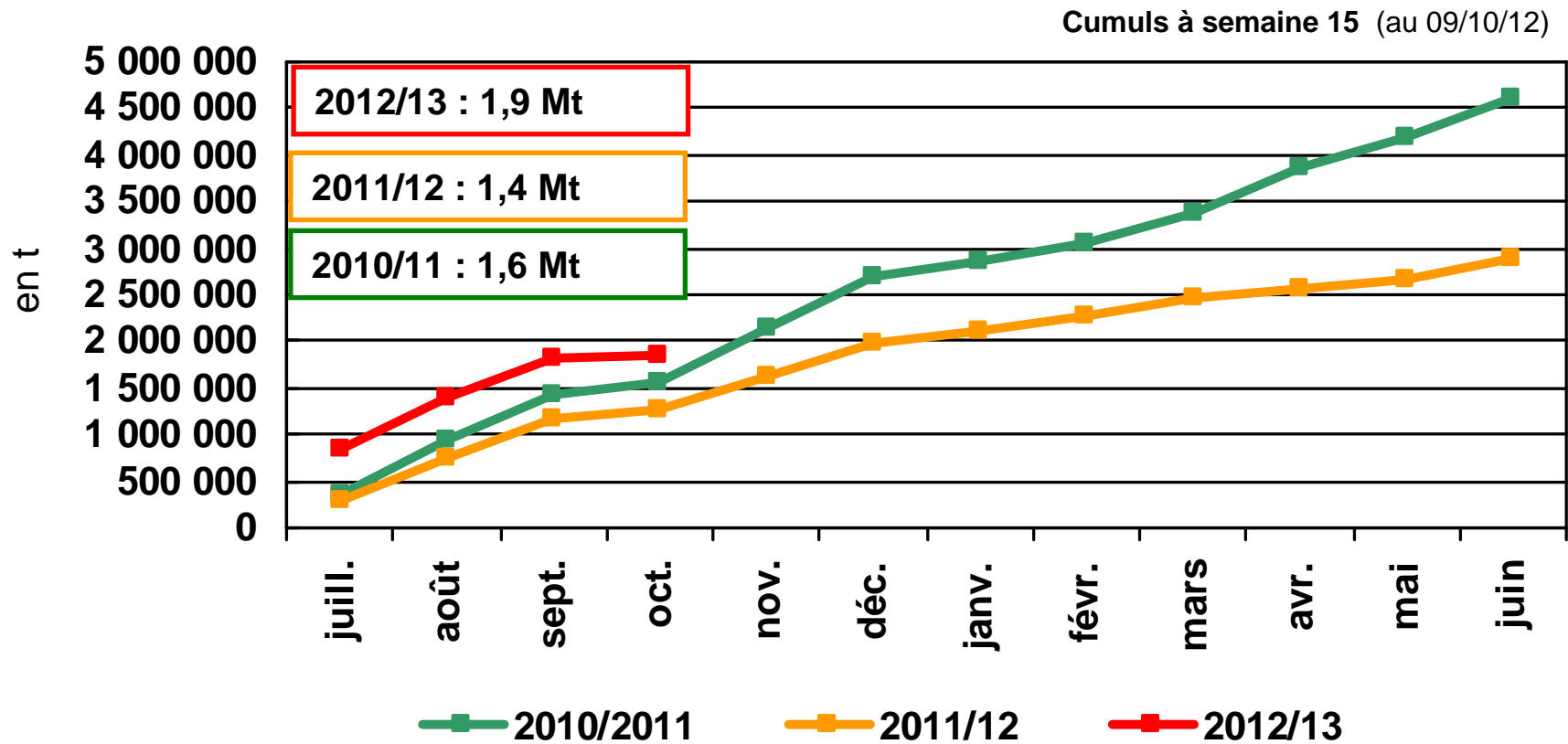
Source : Commission européenne

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



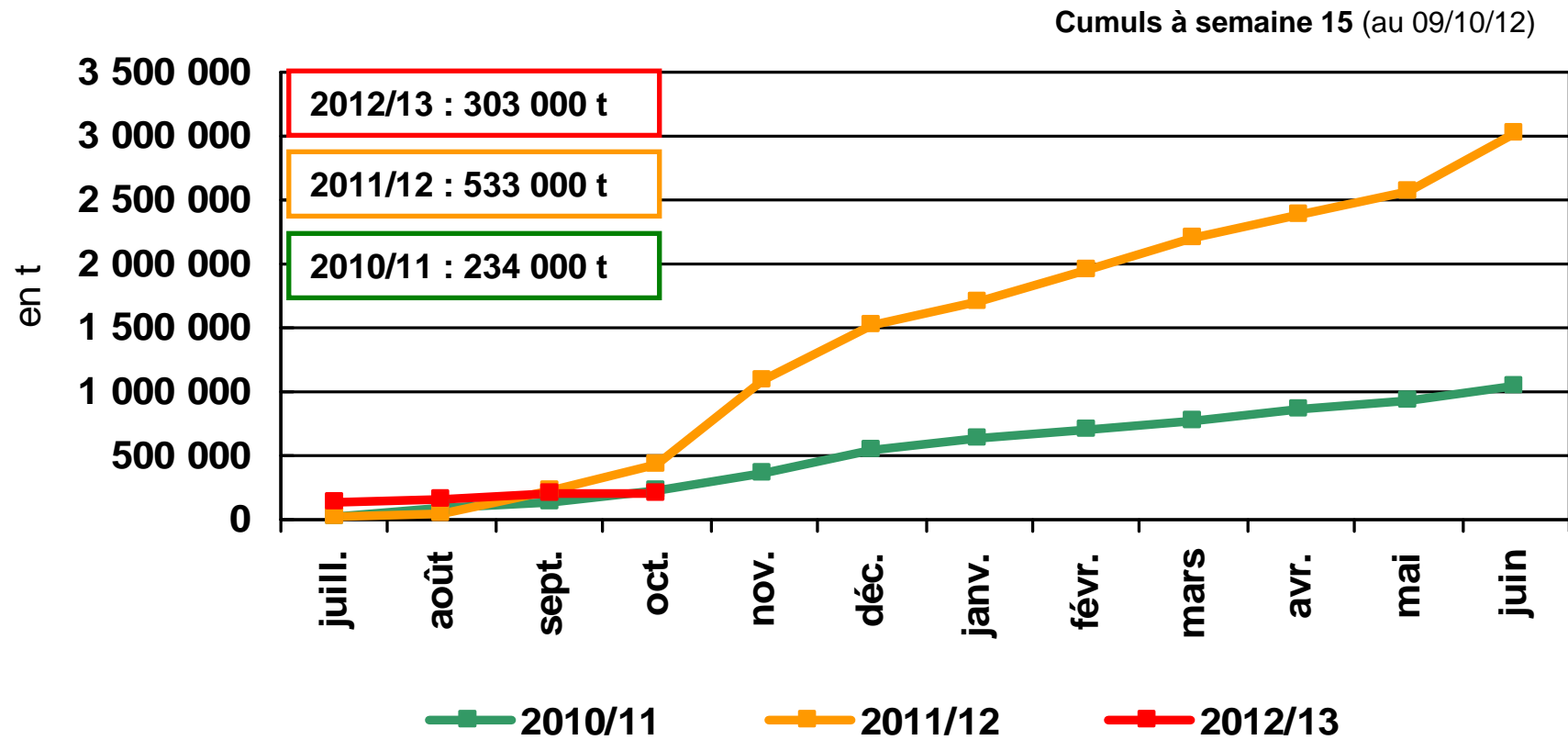
Source : Commission européenne

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



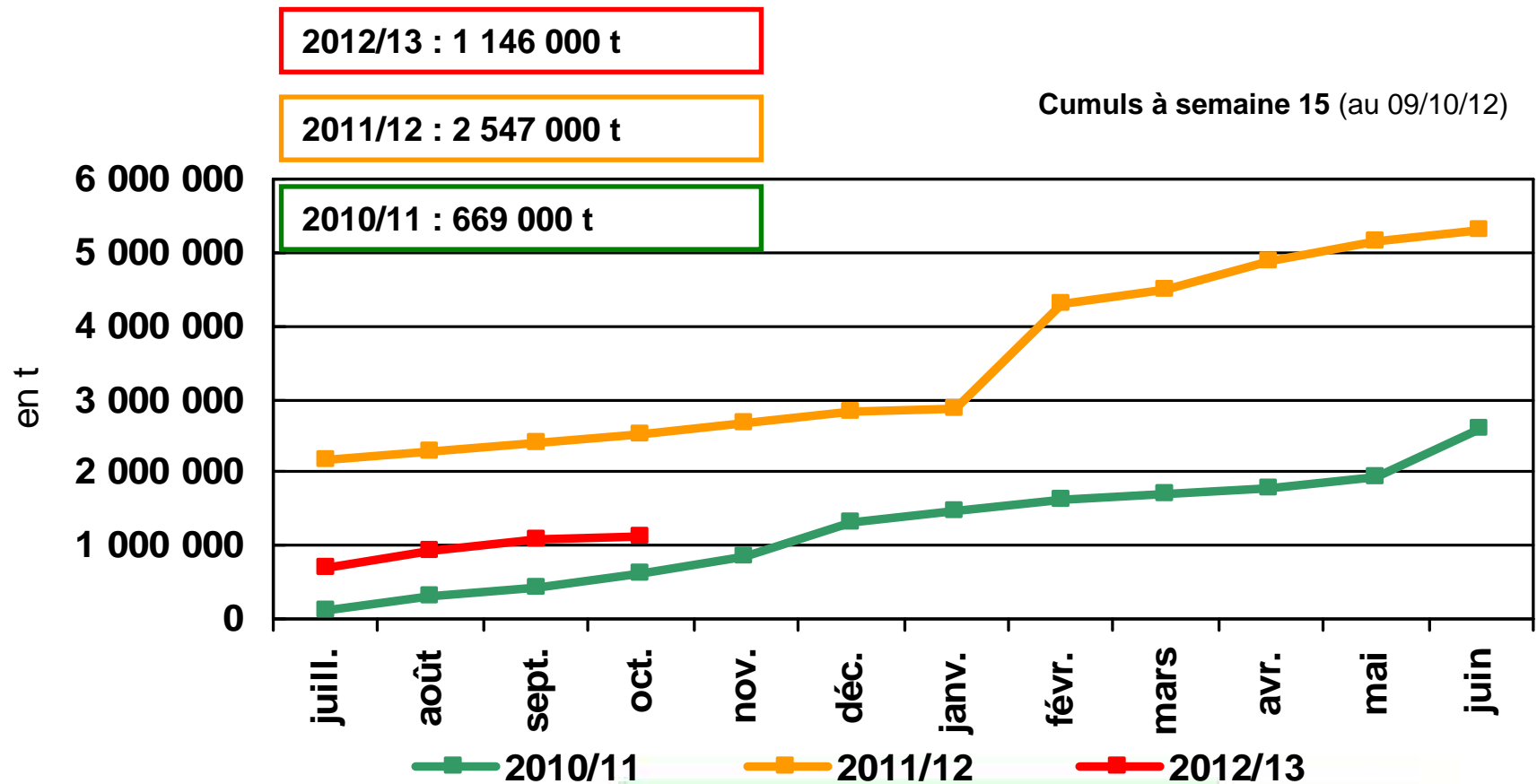
Source : Commission européenne

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

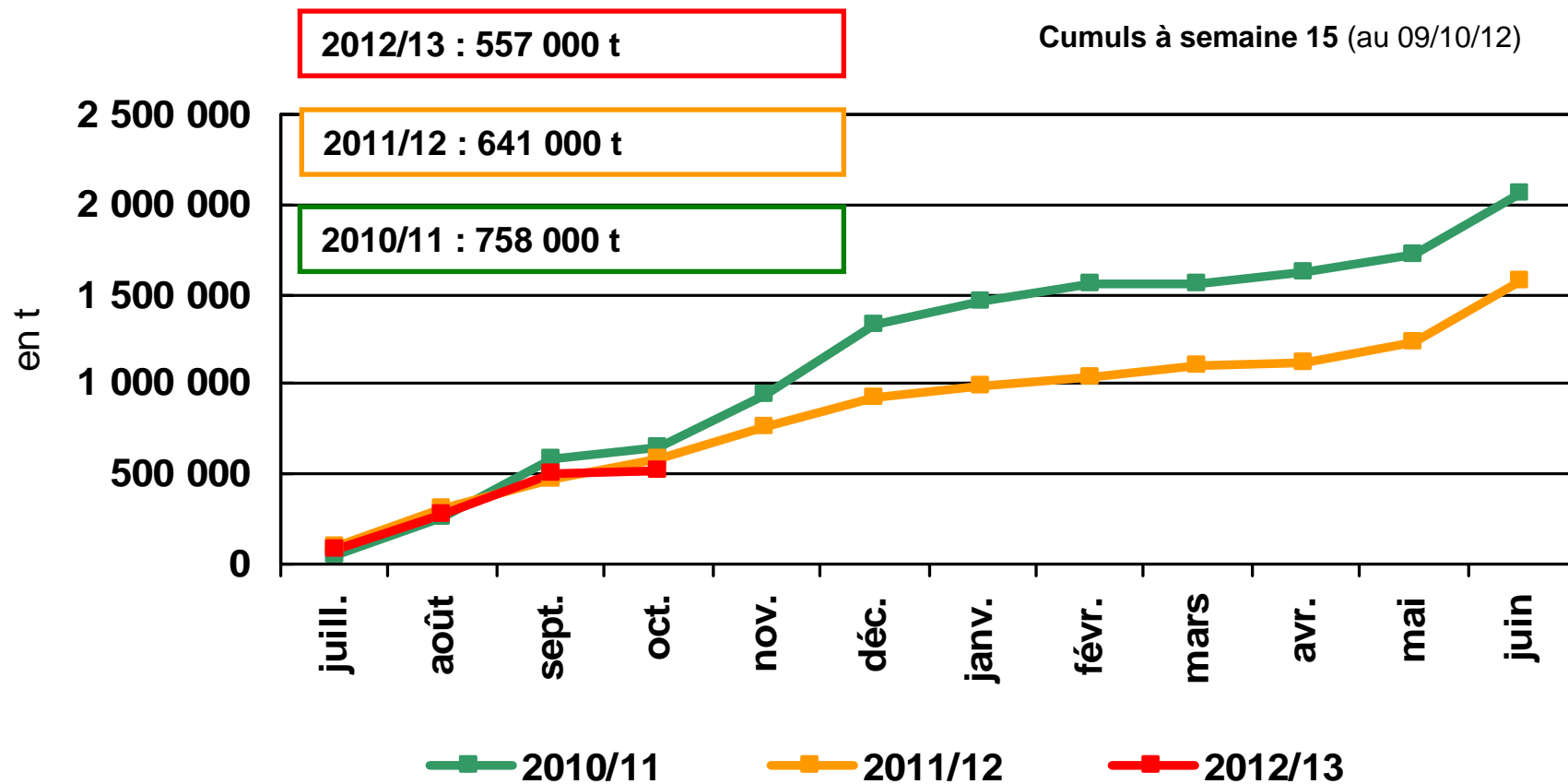


Source : Commission européenne

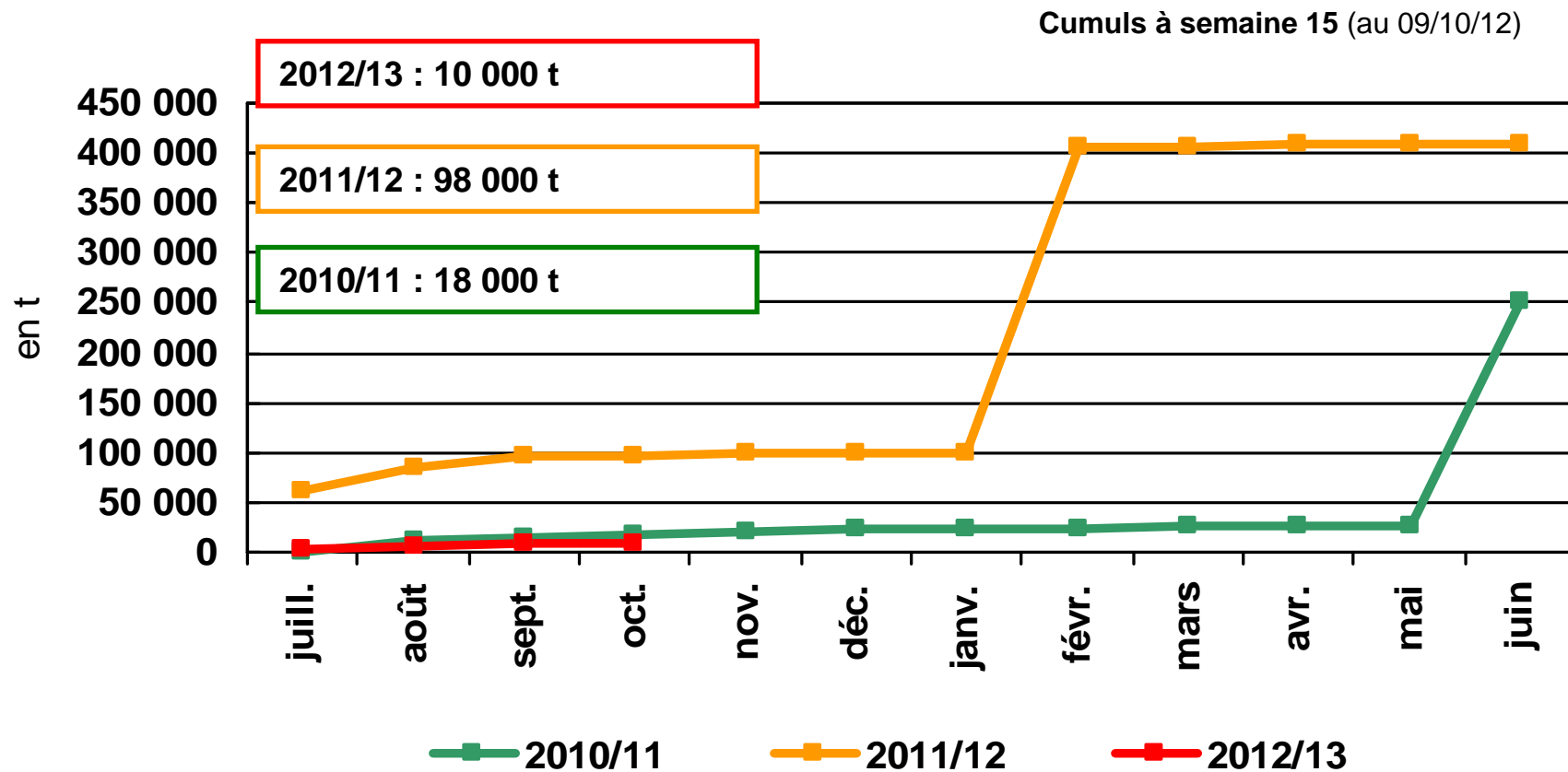
Blé tendre : certificats à l'importation délivrés dans l'UE



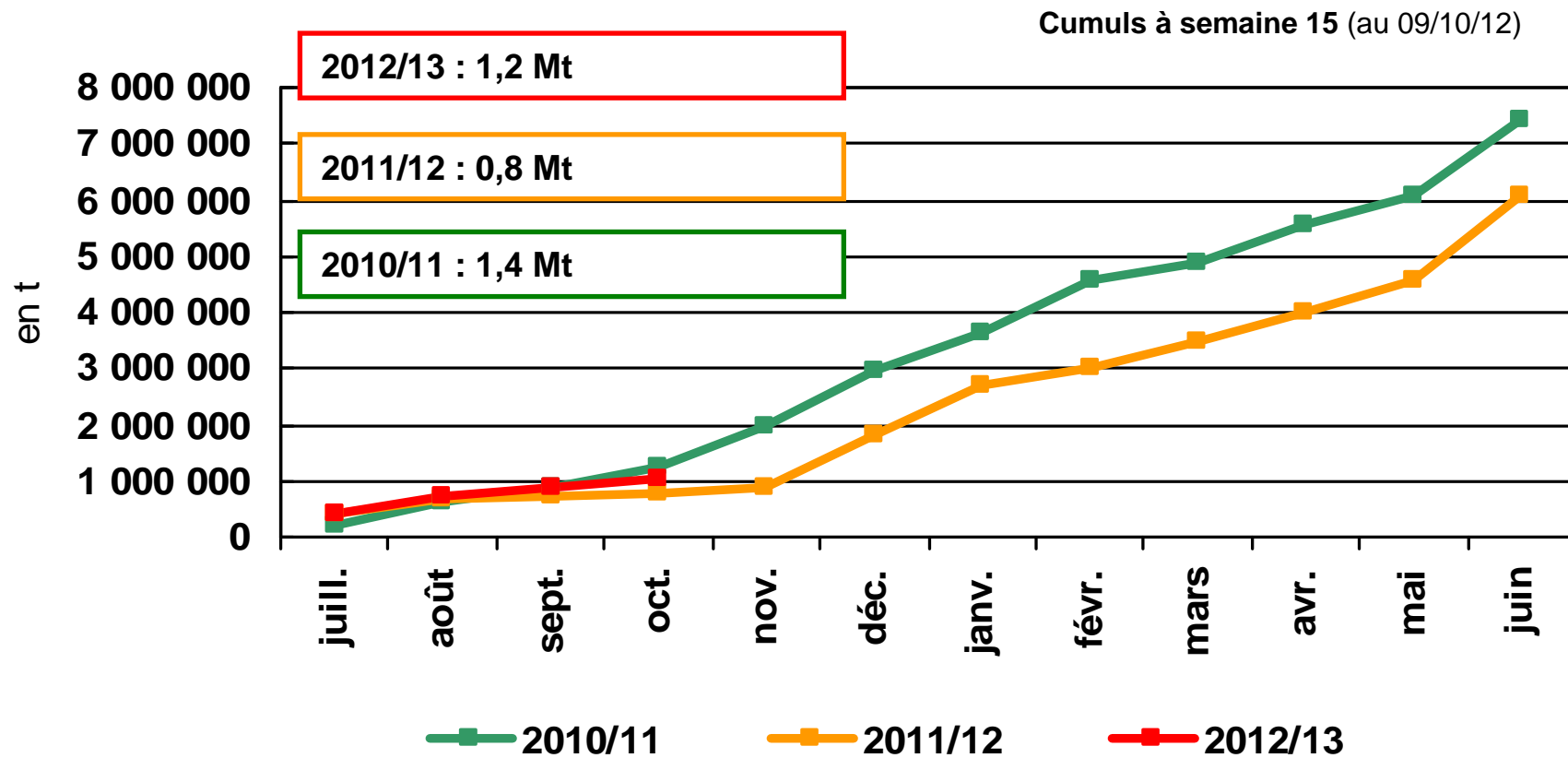
Blé dur : certificats à l'importation délivrés dans l'UE



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

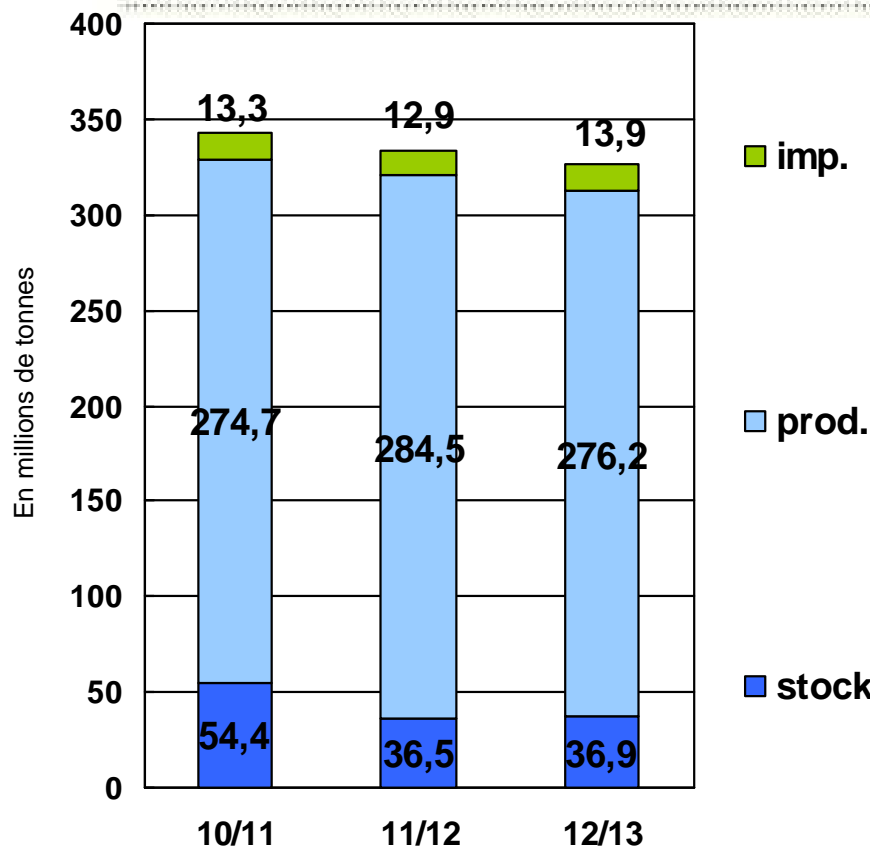


Maïs : certificats à l'importation délivrés dans l'UE

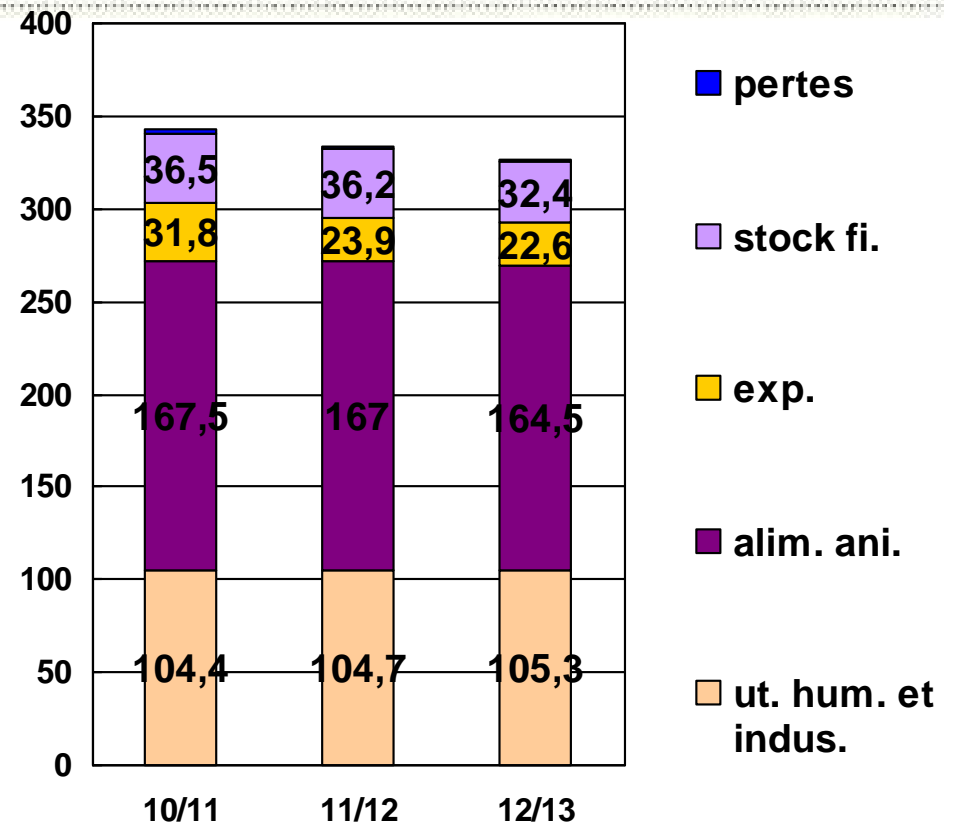


UE - bilan toutes céréales

Total dispo 2012/13 : 327 Mt



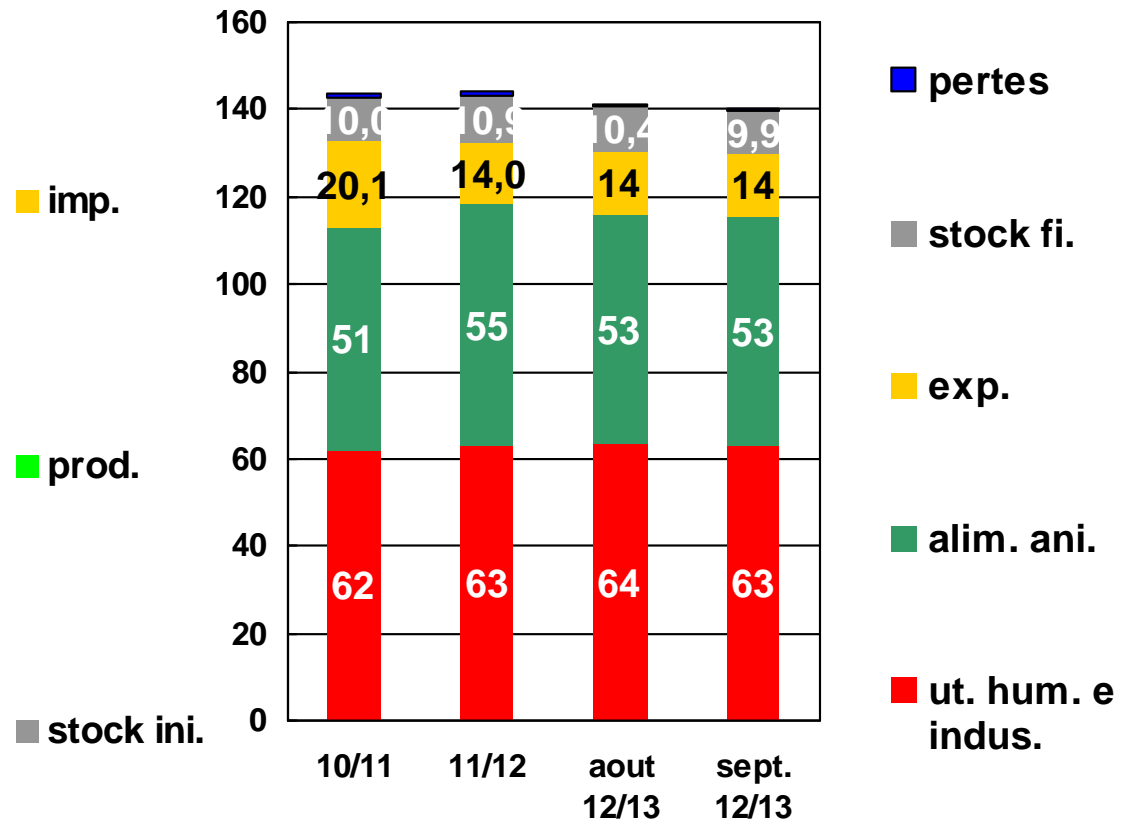
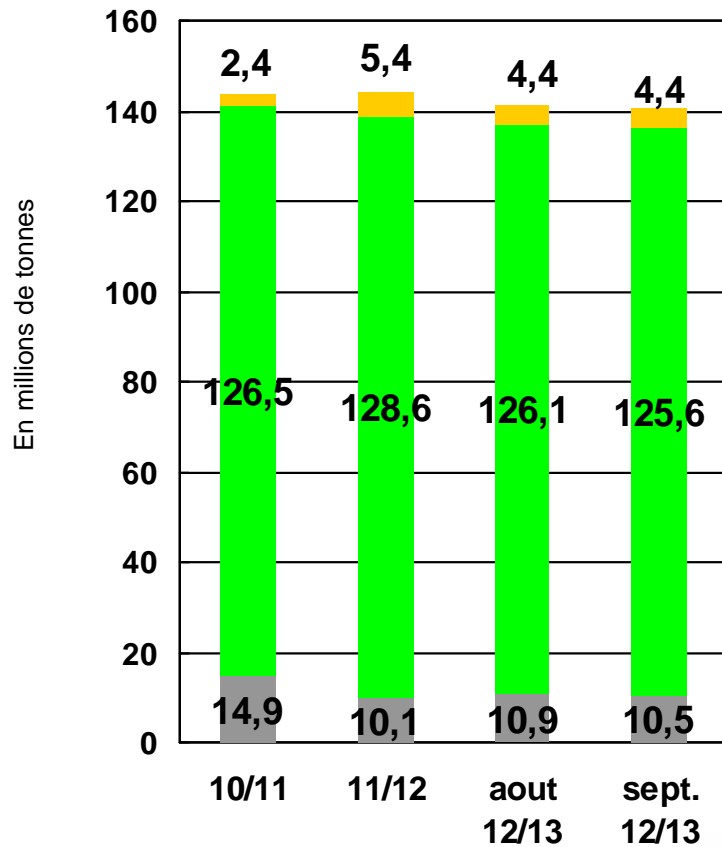
Total utilisation 2012/13 : 327 Mt



UE - bilan blé tendre

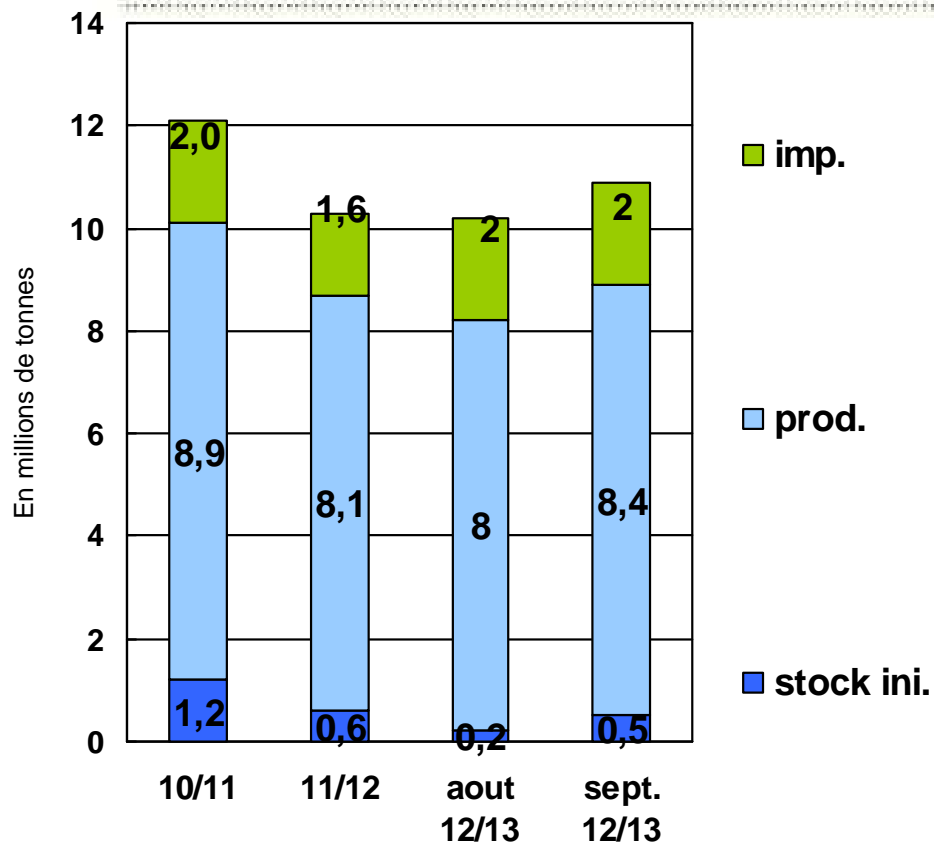
Total dispo 2012/13 : 140,5 Mt

Total utilisation 2012/13 : 140,5 Mt

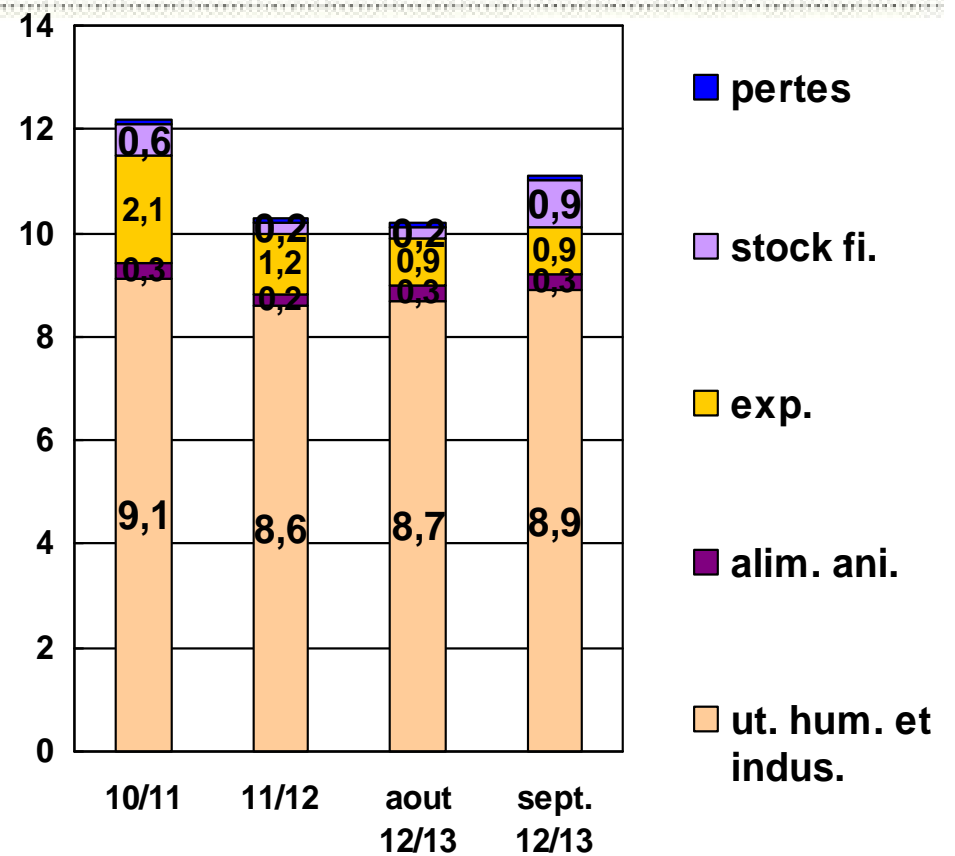


UE - bilan blé dur

Total dispo 2012/13 : 11 Mt

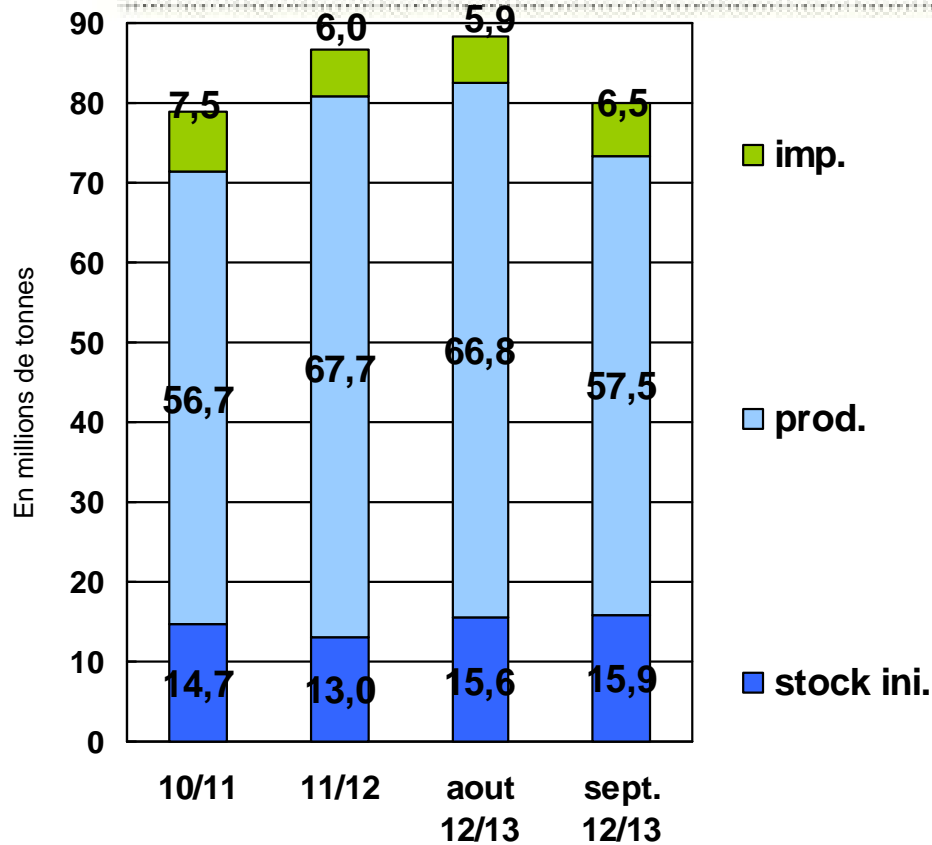


Total utilisation 2012/13 : 11 Mt

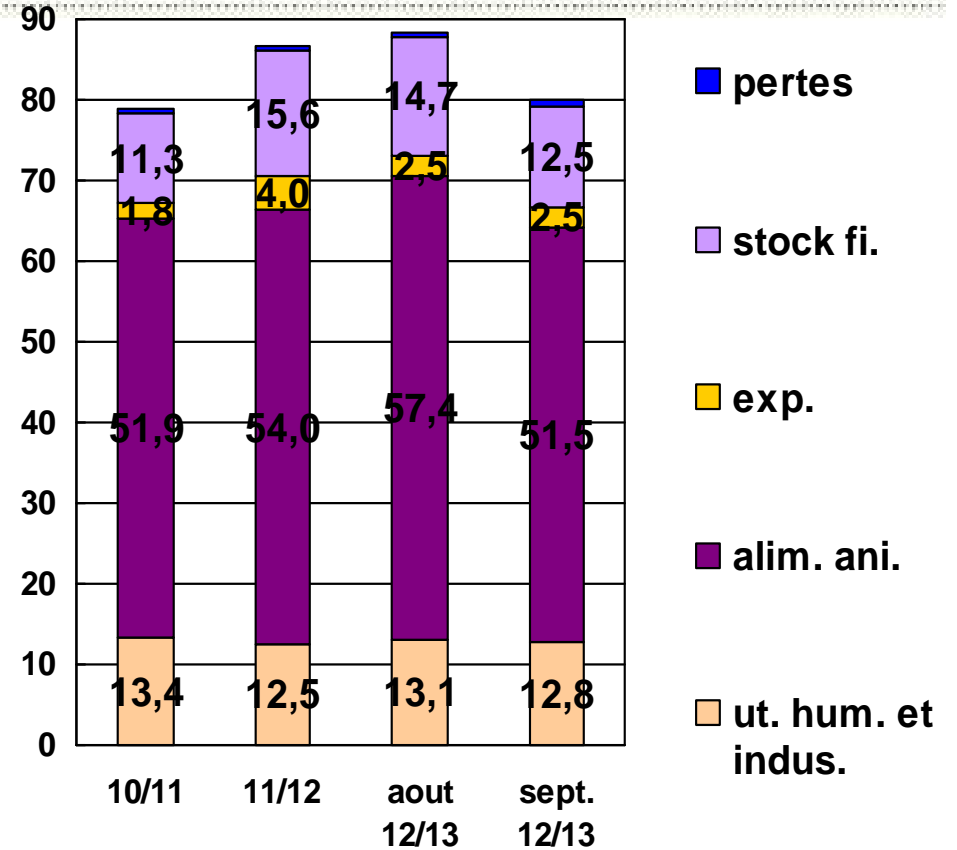


UE - bilan maïs

Total dispo 2012/13 : 79,9 Mt

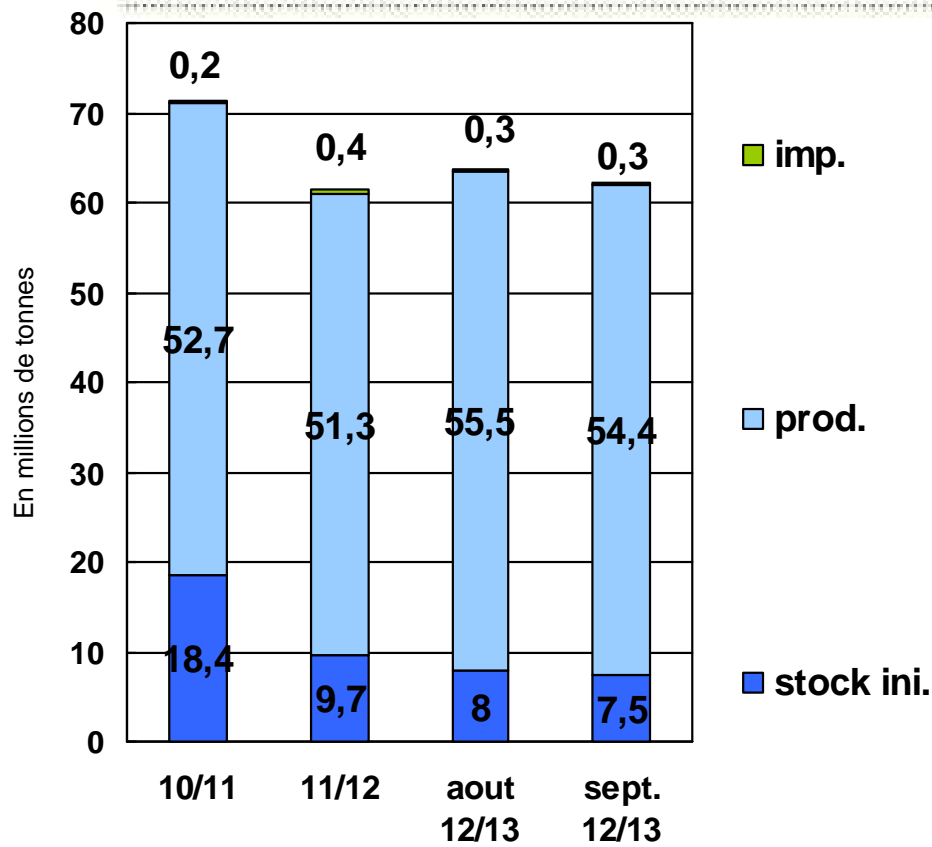


Total utilisation 2012/13 : 79,9 Mt

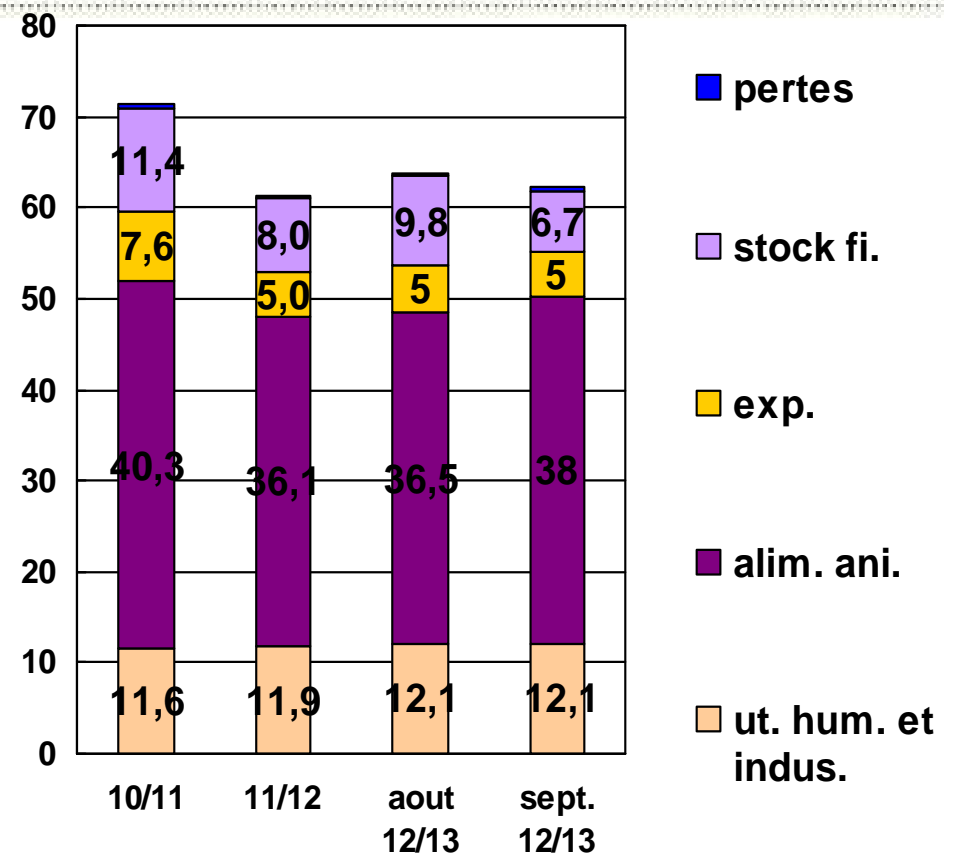


UE - bilan orge

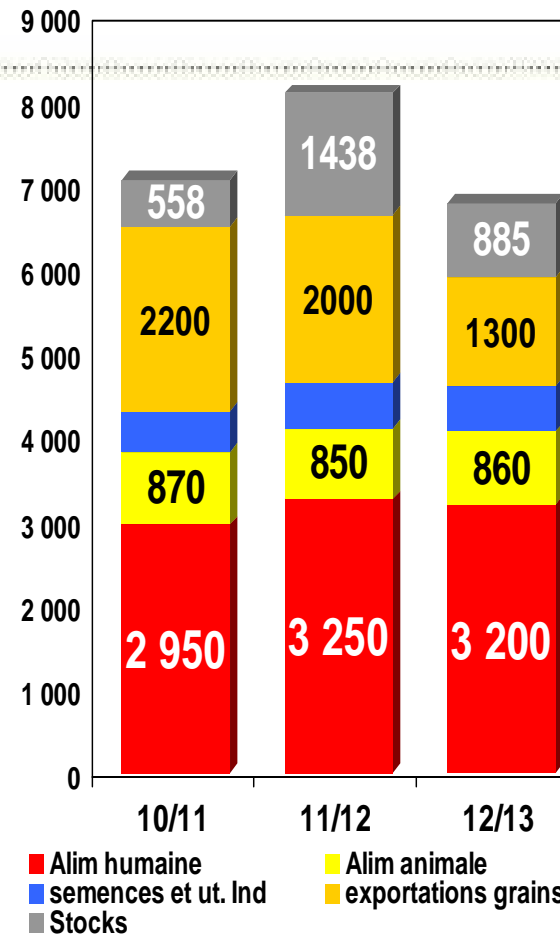
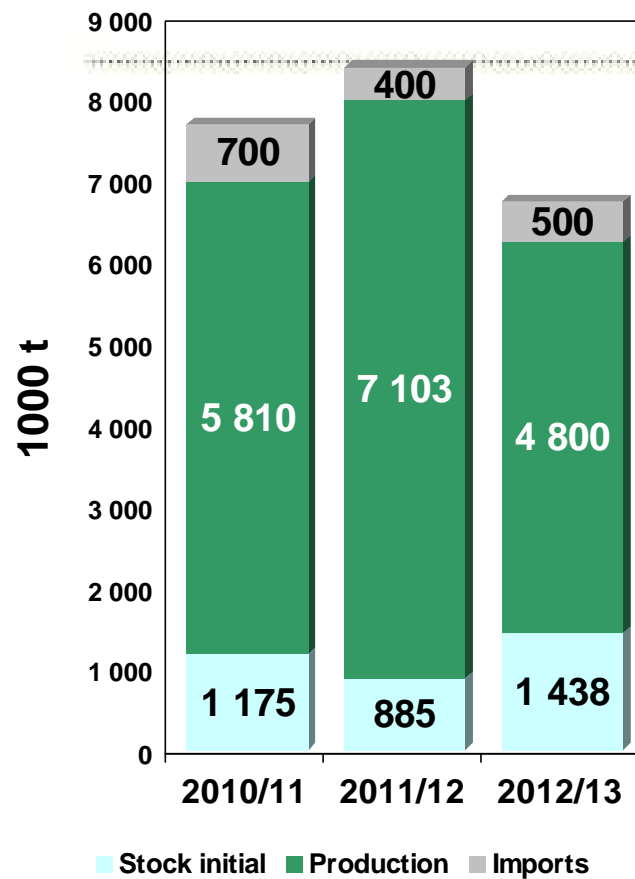
Total dispo 2012/13 : 62,1 Mt



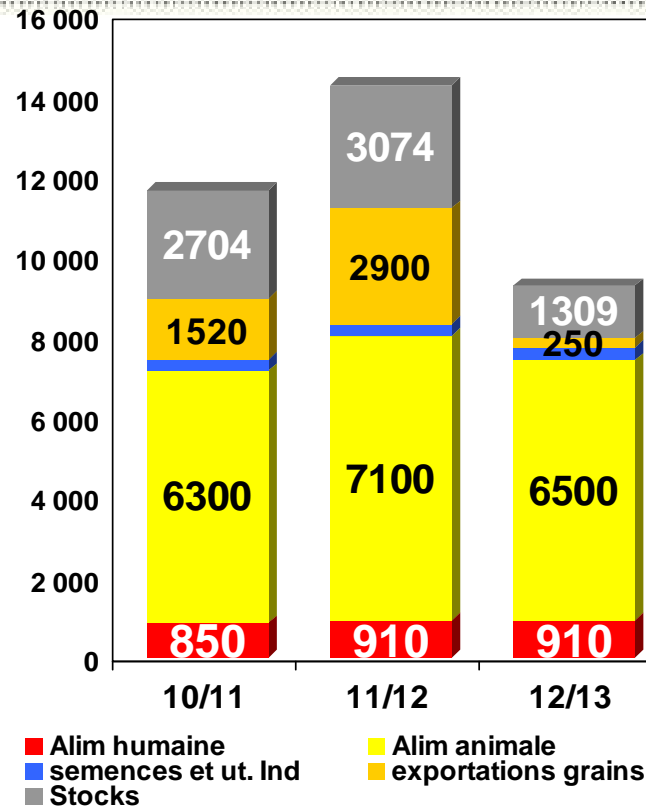
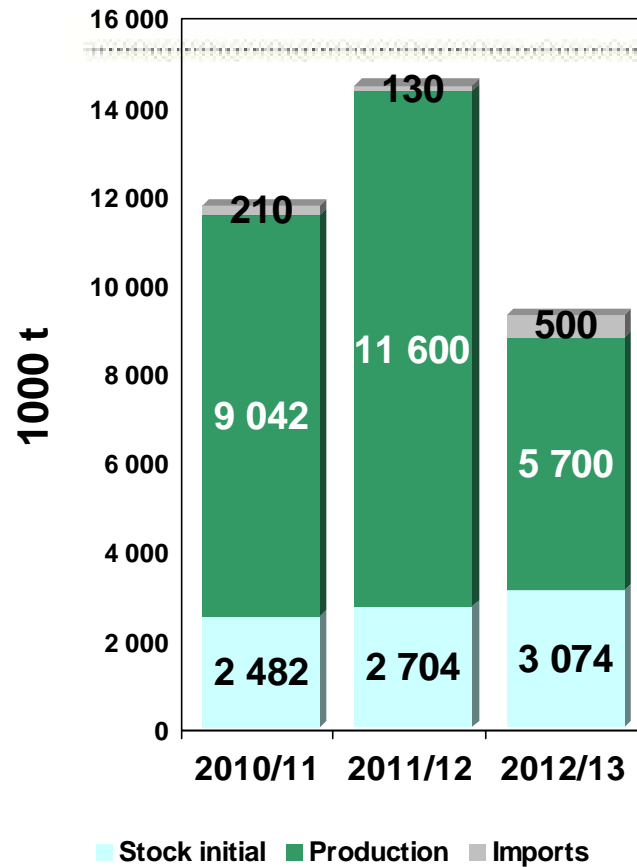
Total utilisation 2012/13 : 62,1 Mt



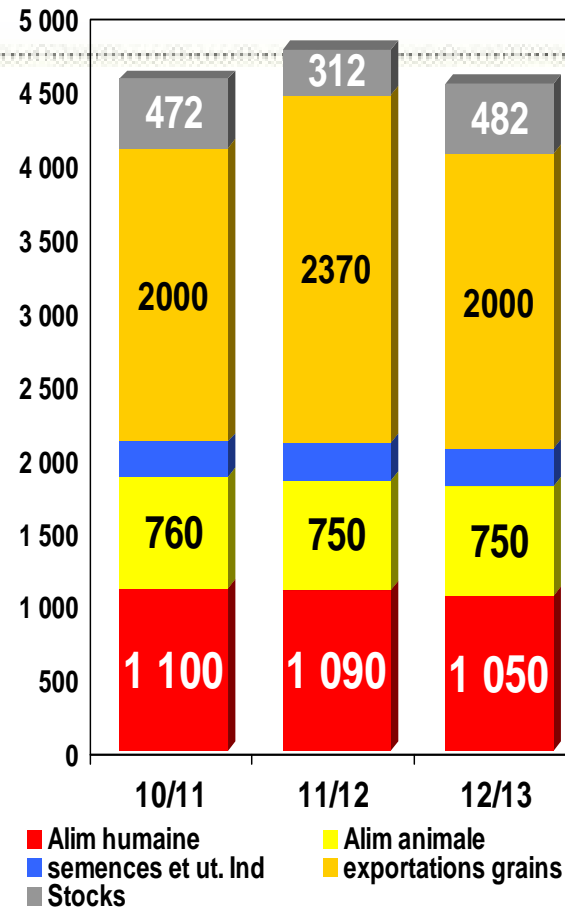
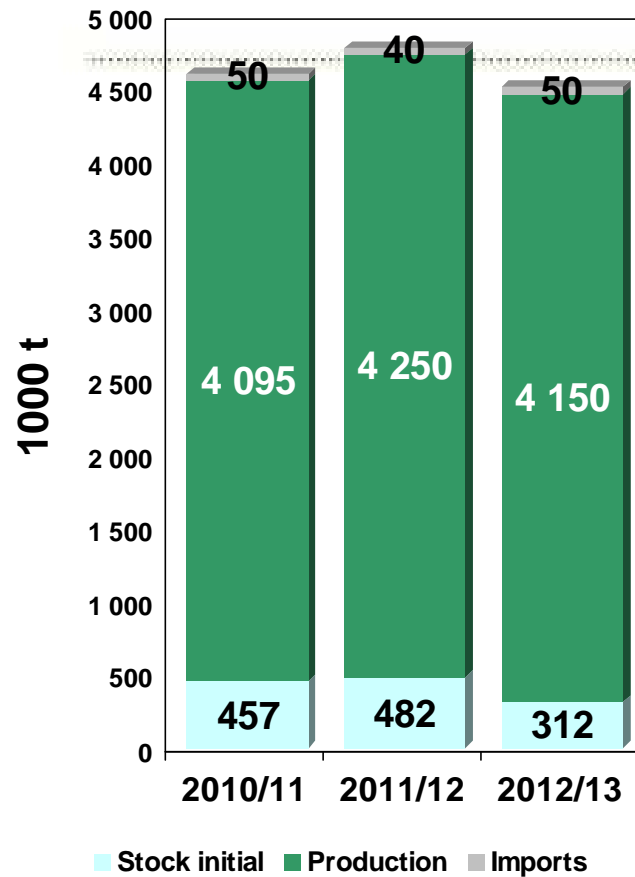
ROUMANIE : Bilan Blé tendre



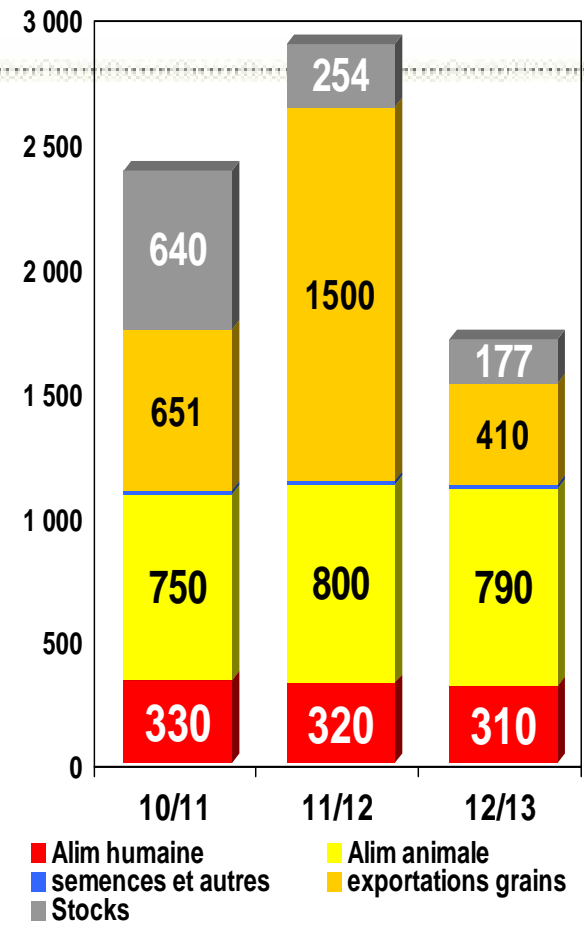
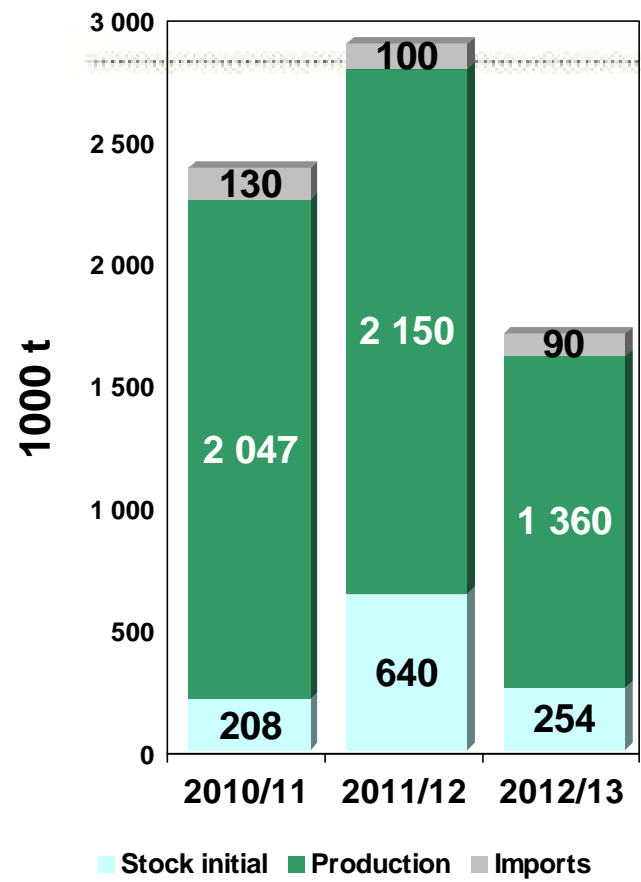
ROUMANIE : Bilan maïs



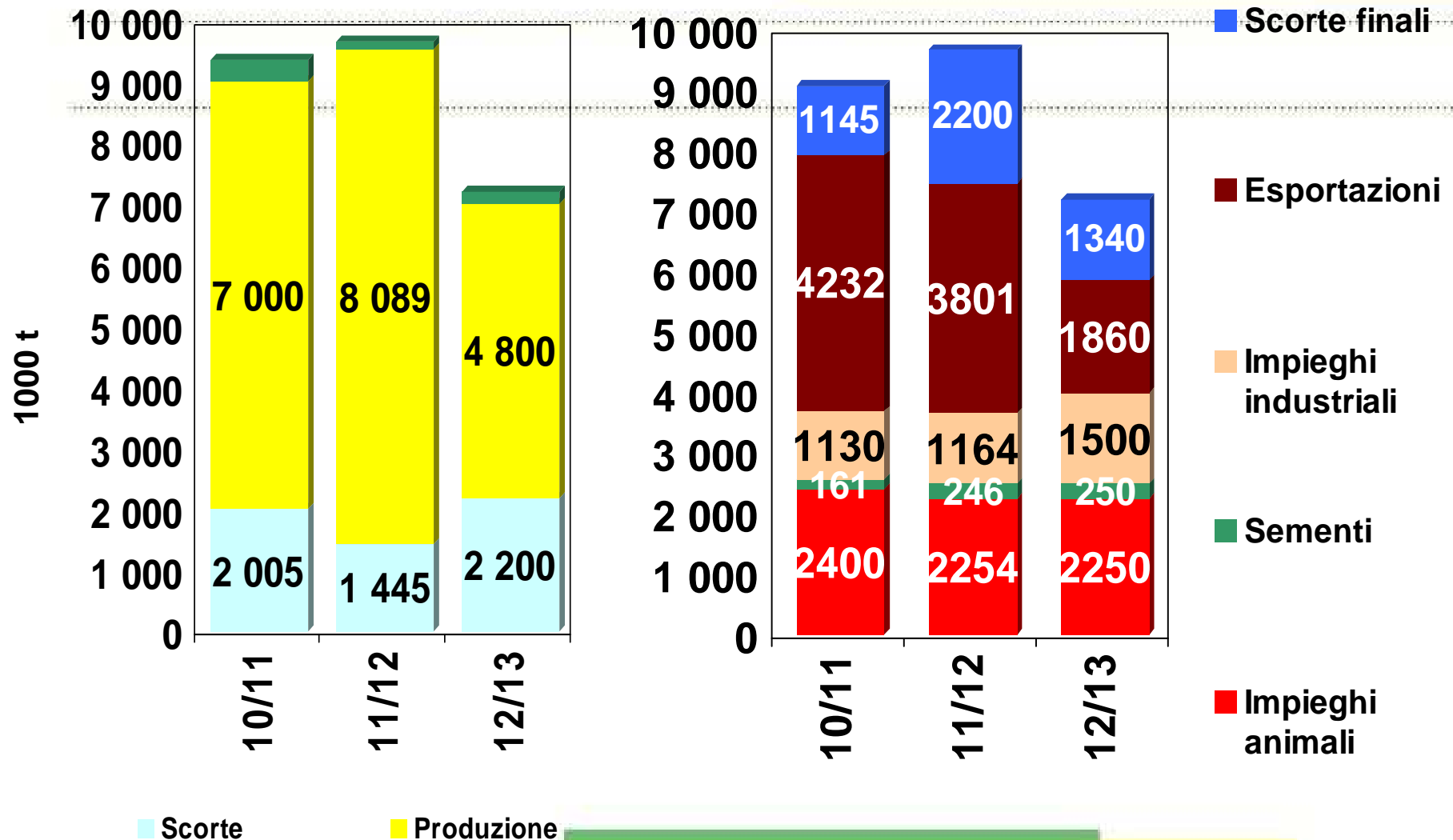
BULGARIE : bilan blé tendre



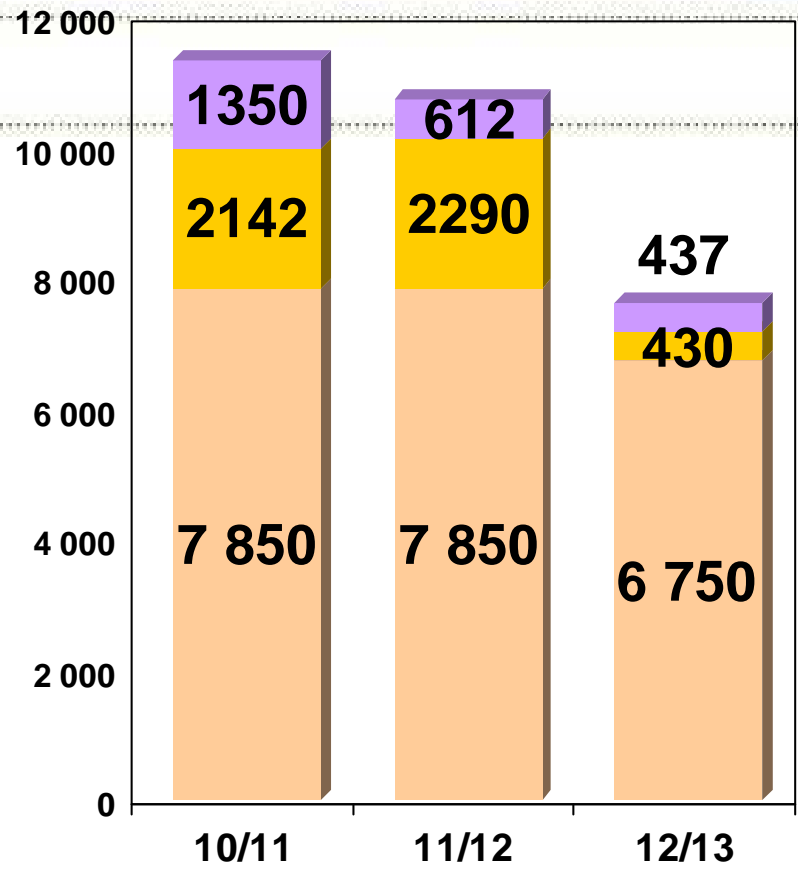
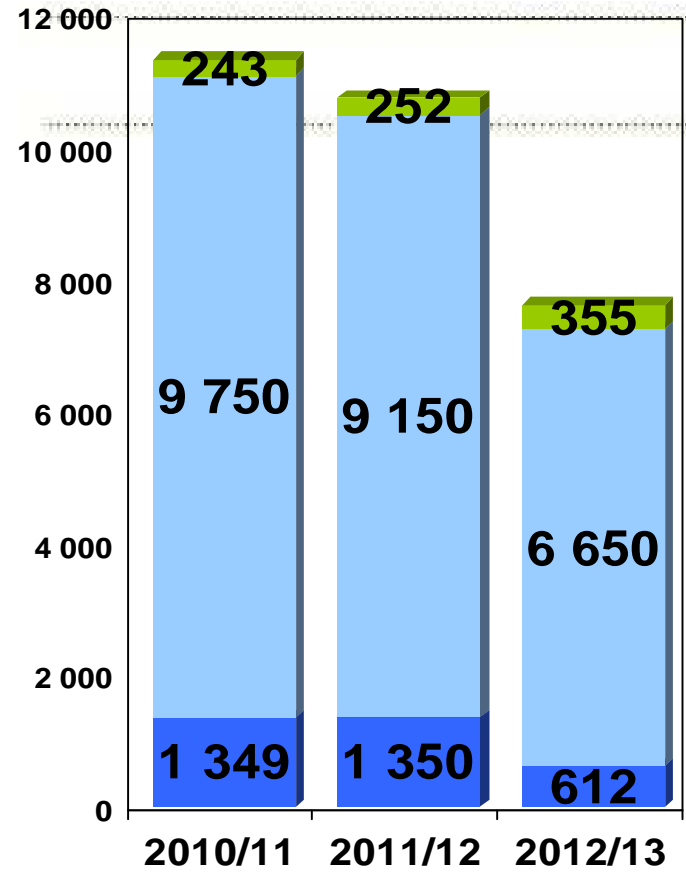
BULGARIE : bilan maïs



Hongrie, bilan maïs



Bilan Maïs Balkans



■ Stock initial ■ Production ■ Imports

■ Conso intérieure ■ exportations grains ■ Stocks



Production de maïs de l'Europe danubienne

	10/11	11/12	12/13	%
Roumanie	9 042	11 600	5 700	-51%
Bulgarie	2 047	2 150	1 360	-37%
Hongrie	7 000	8 089	4 800	-41%
Balkans occidentaux	9 750	9 150	6 650	-27%
Total	27 839	30 989	18 510	-40%



RAINFALL

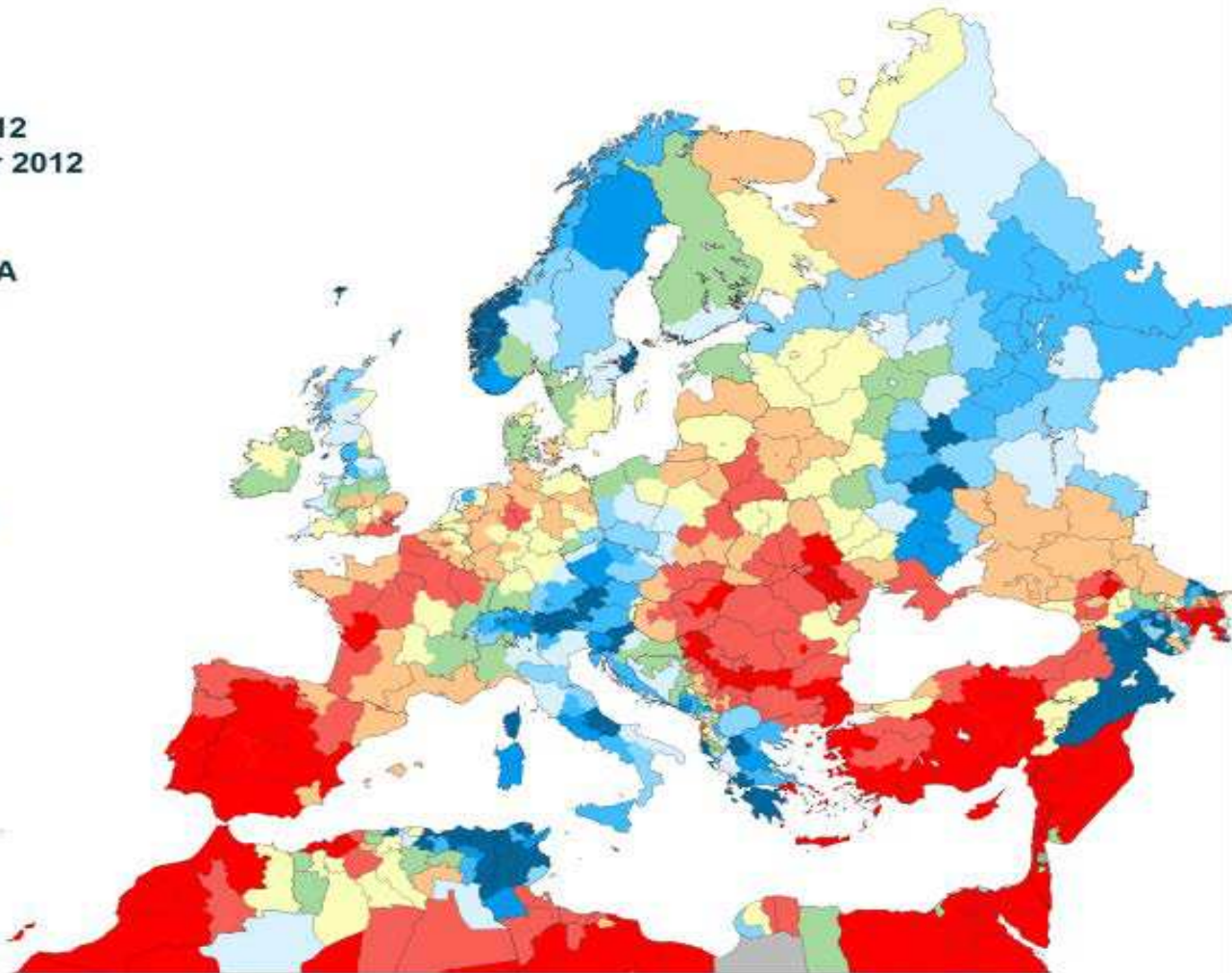
Cumulated values

from : 21 August 2012
to : 15 September 2012

Deviation:

Year of interest - LTA

Unit: %



17/09/2012
resolution: NUTS Level 2



(c) European Union 2012,
source: Joint Research Centre
Processed by: ALTERRA consortium



RAINFALL

ECMWF operational model (starting 20 September 2012)

Cumulated values

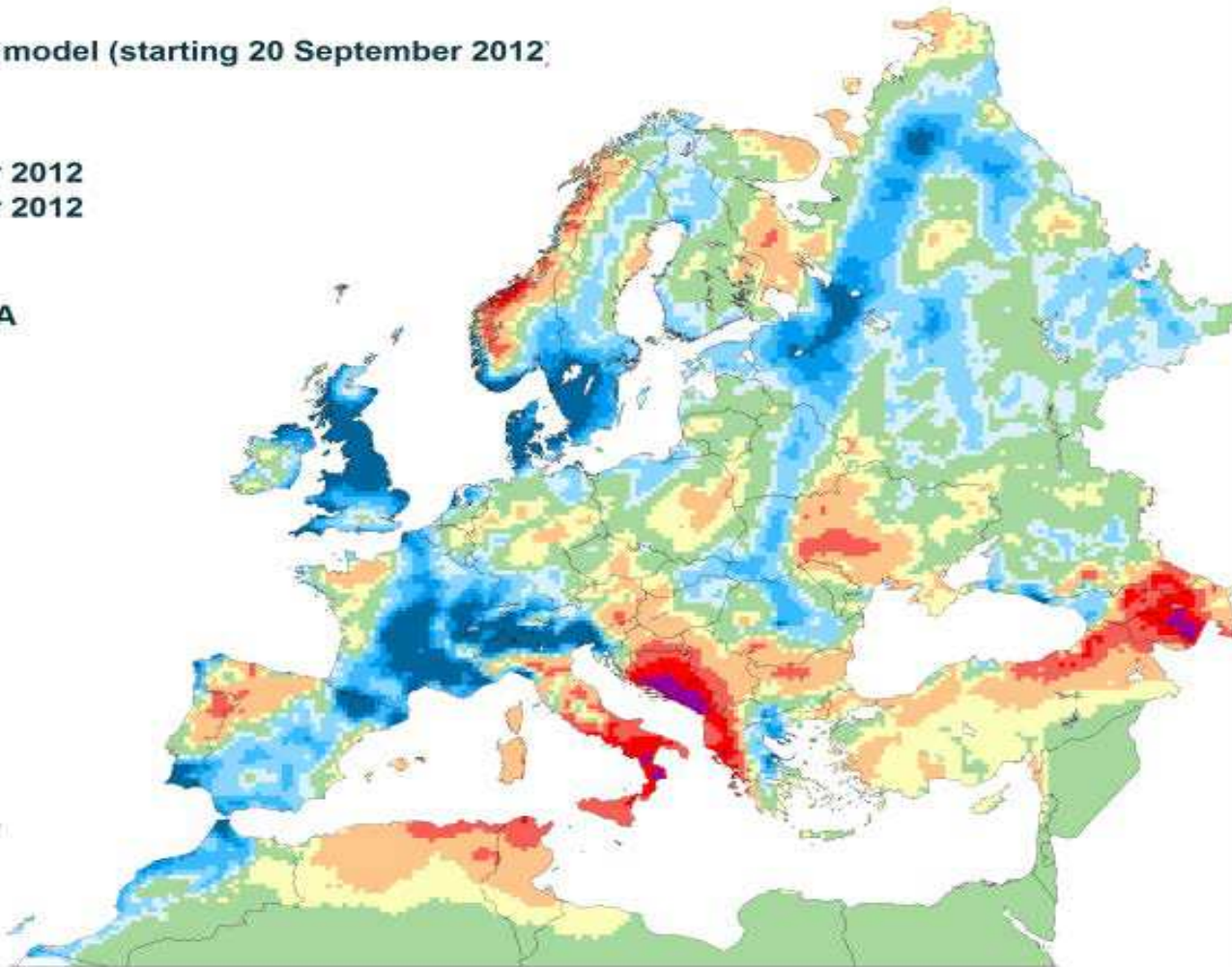
from : 16 September 2012

to : 29 September 2012

Deviation:

Year of interest - LTA

Unit: mm



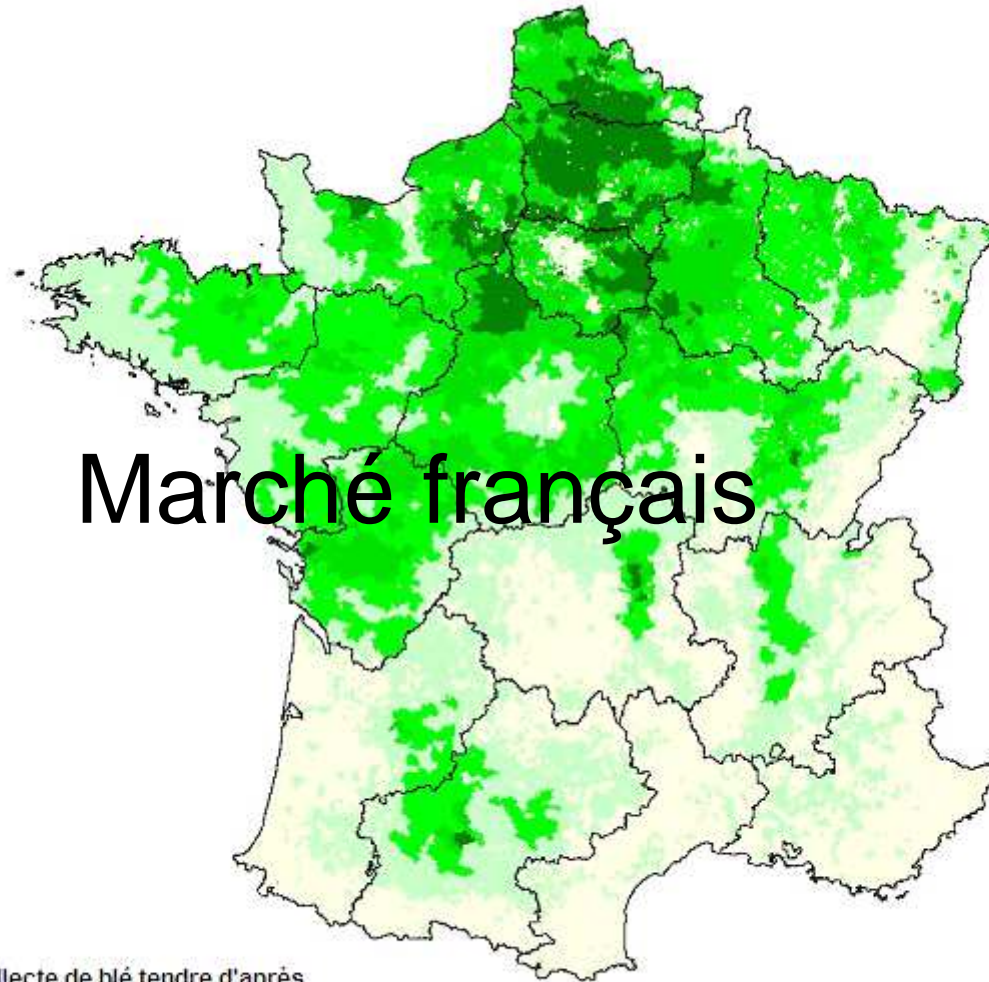
20/09/2012
resolution: 25x25 km



(c) European Union 2012,
source: Joint Research Centre
Processed by: ALTERRA consortium



FranceAgriMer

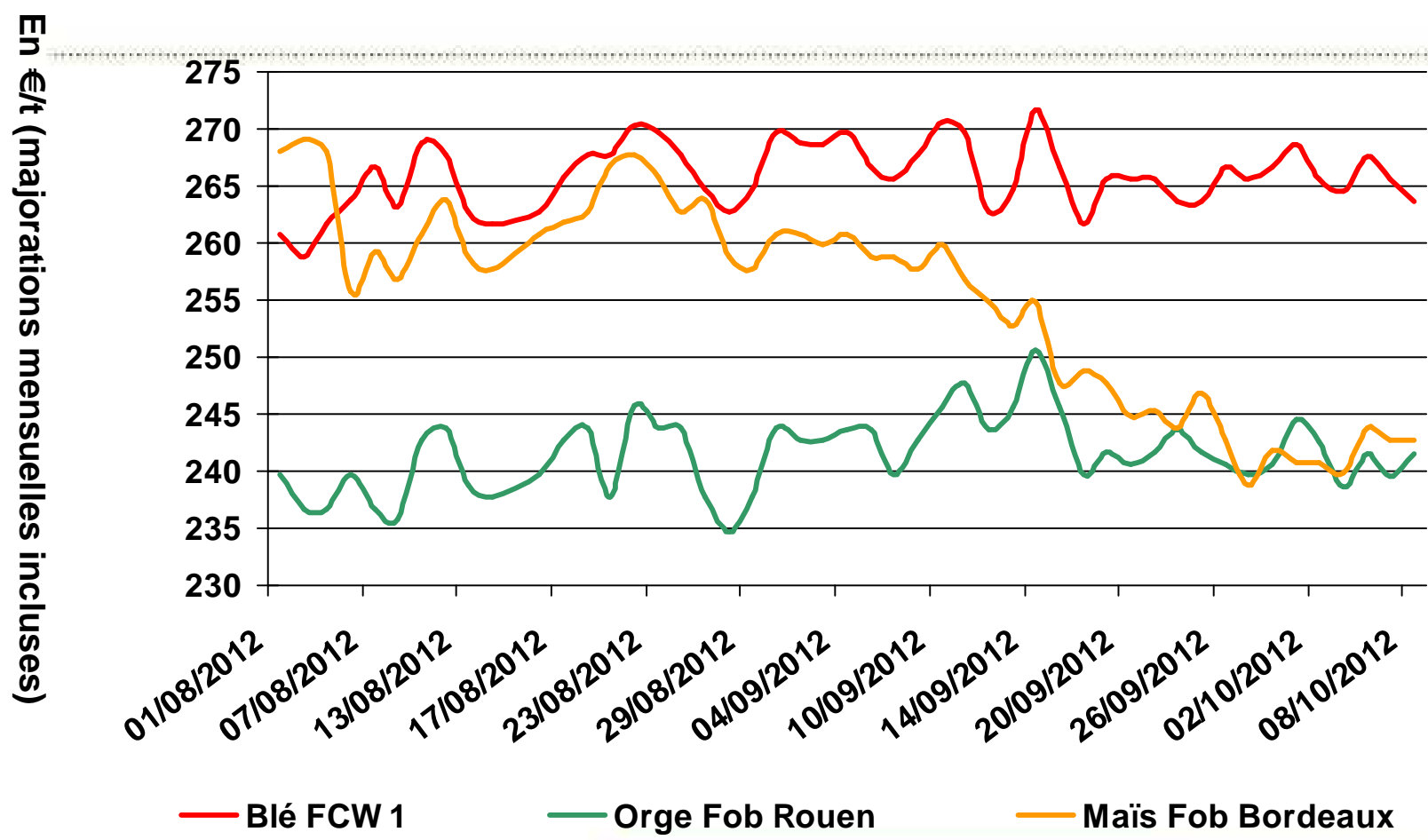


Marché français

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

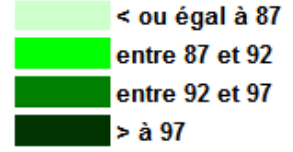
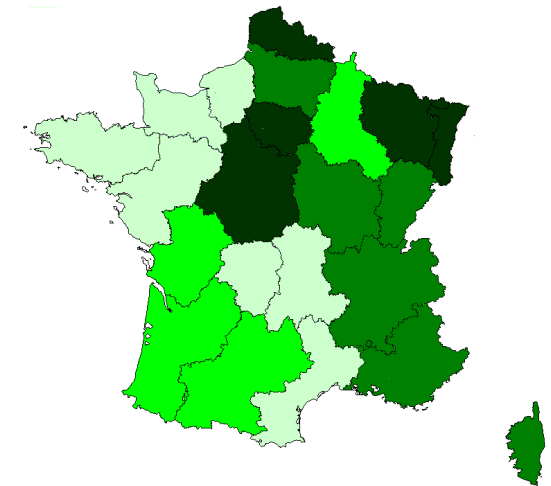
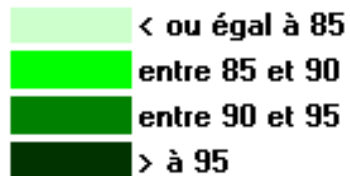
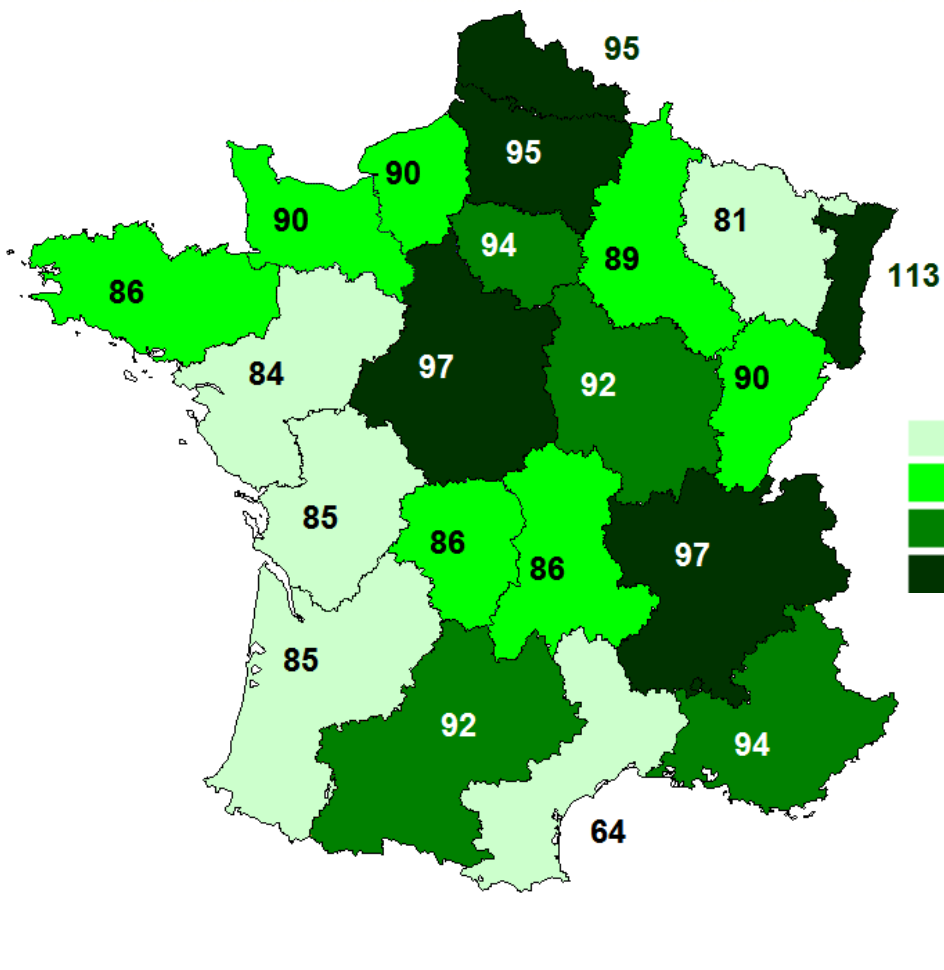


Céréales françaises : cotations à l'exportation



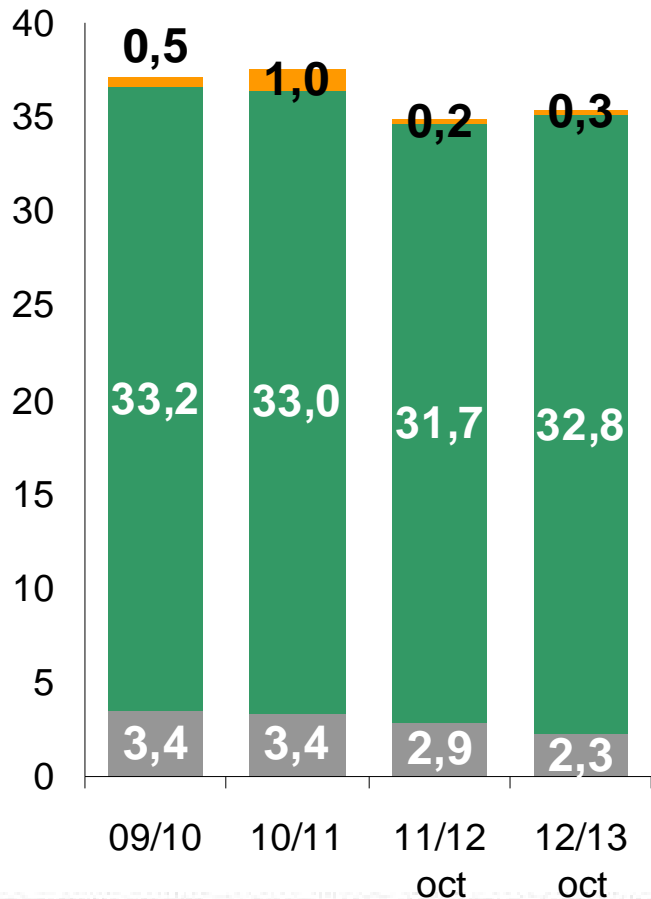
Maïs : dernières estimations récolte 2012

Maïs : rendements moyens 2007-2011



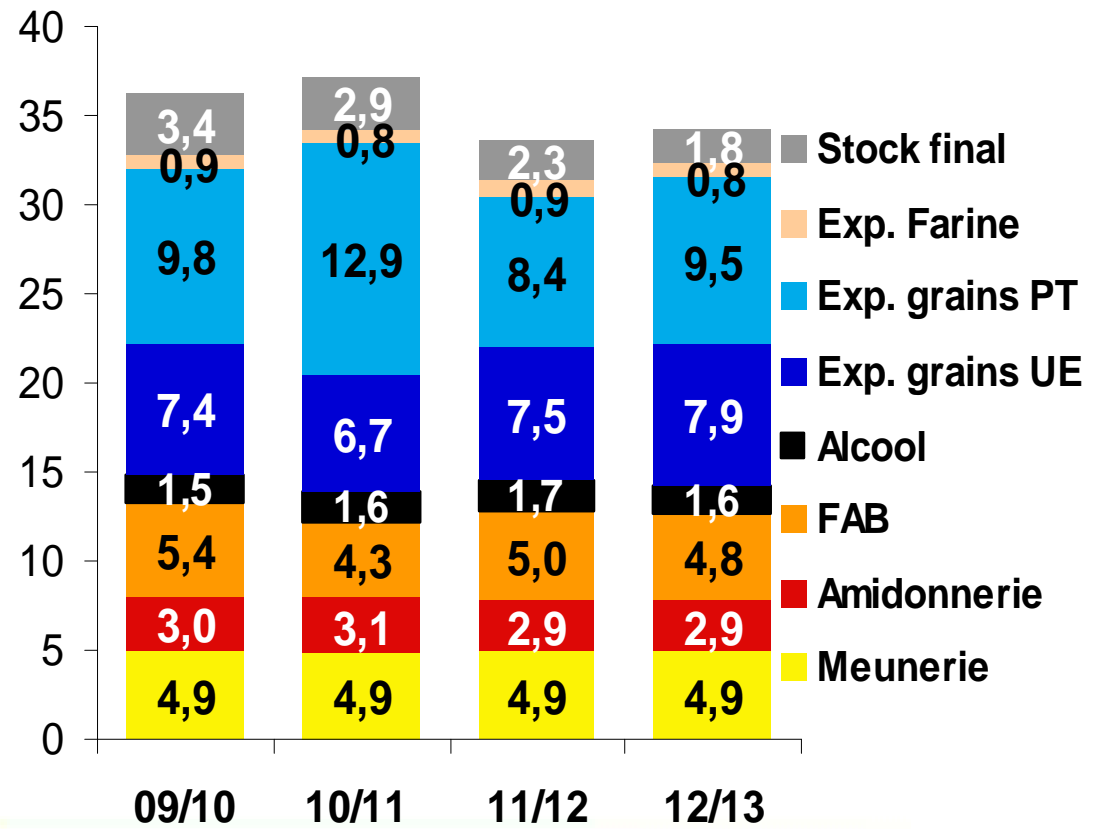
Bilan blé tendre

Mt

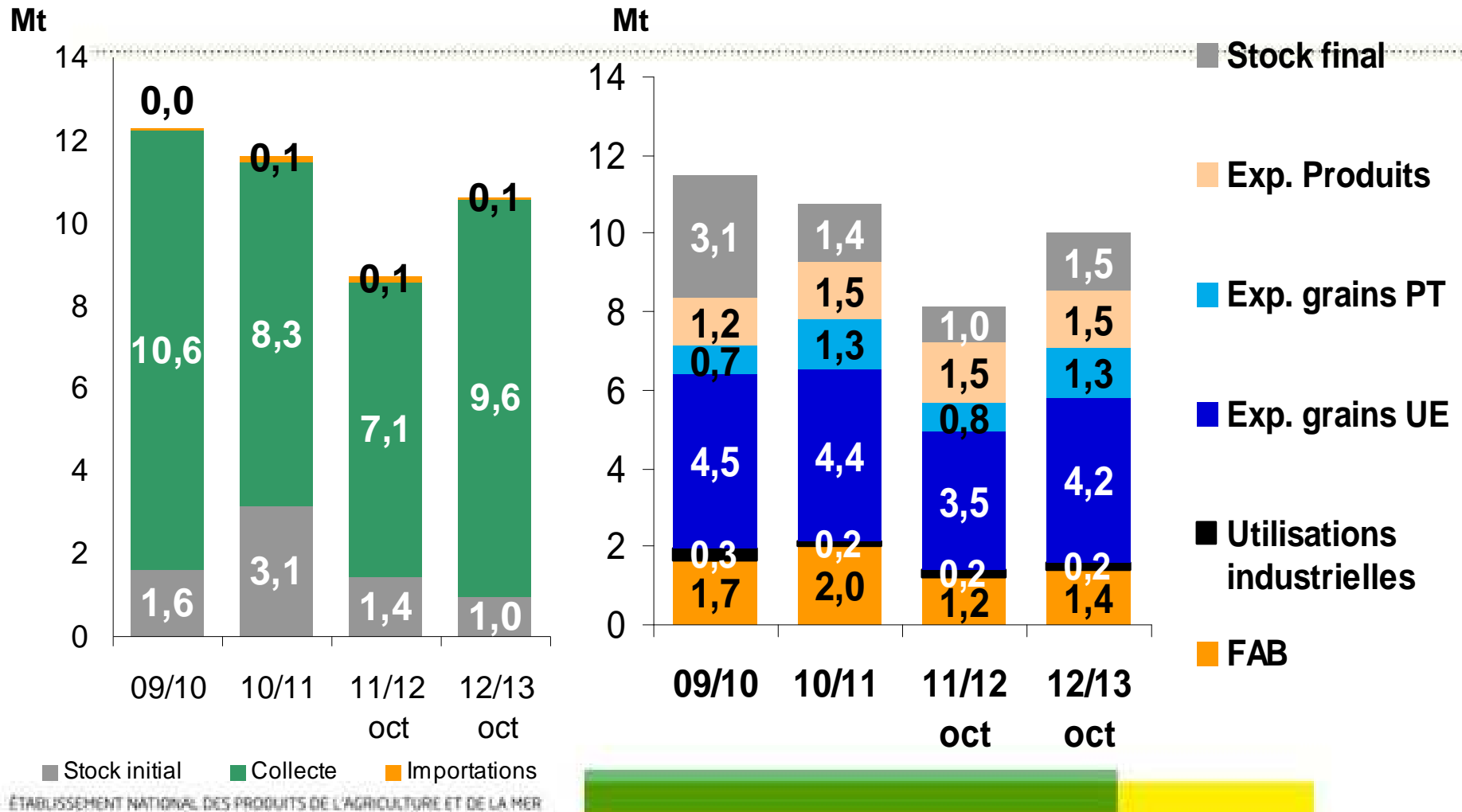


ÉTAT DES PLACES AGRICOLLES

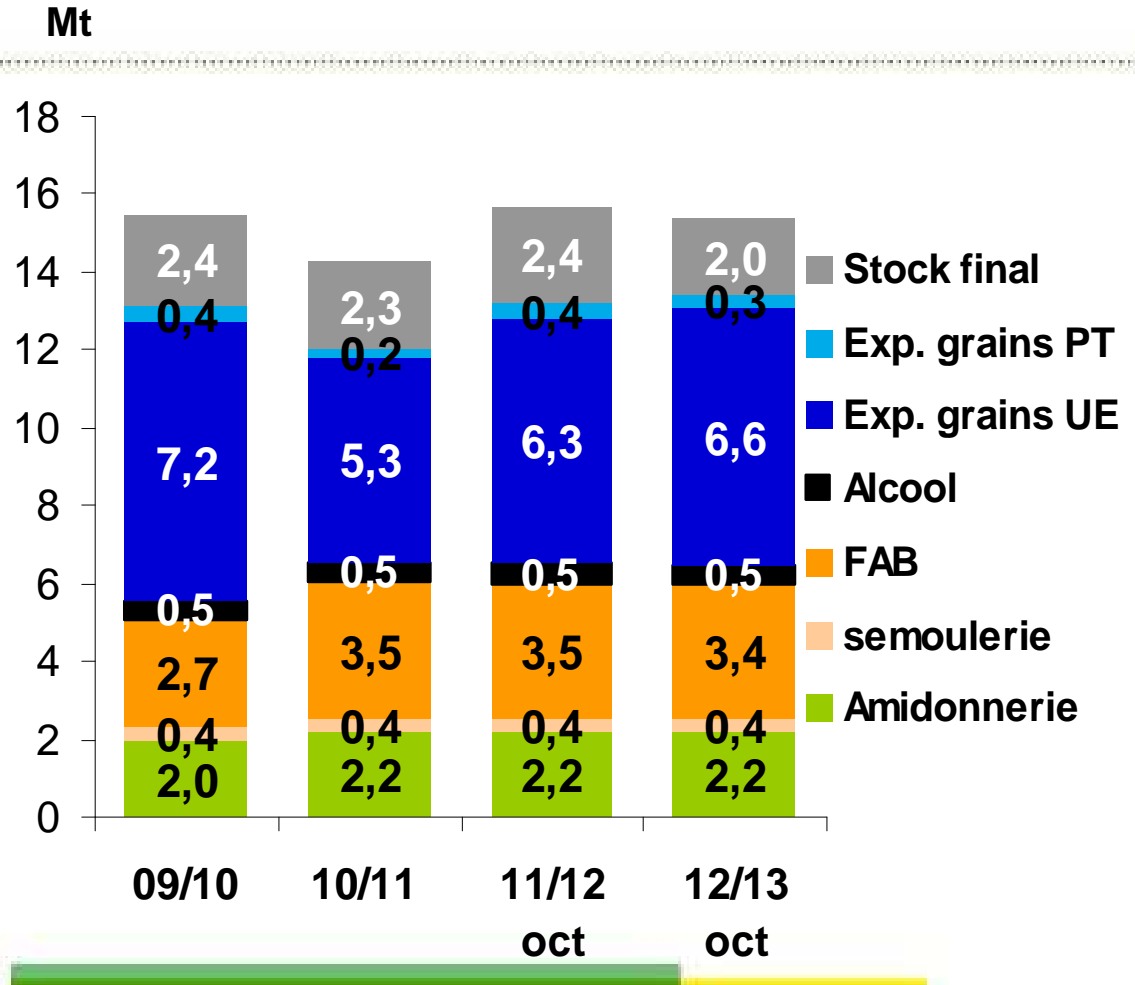
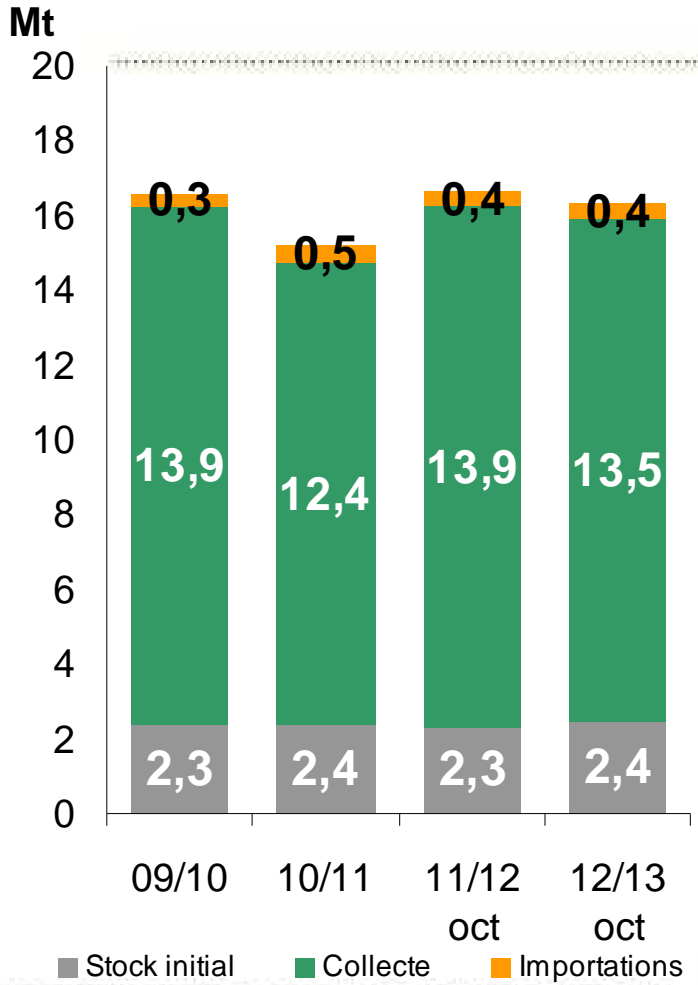
Mt



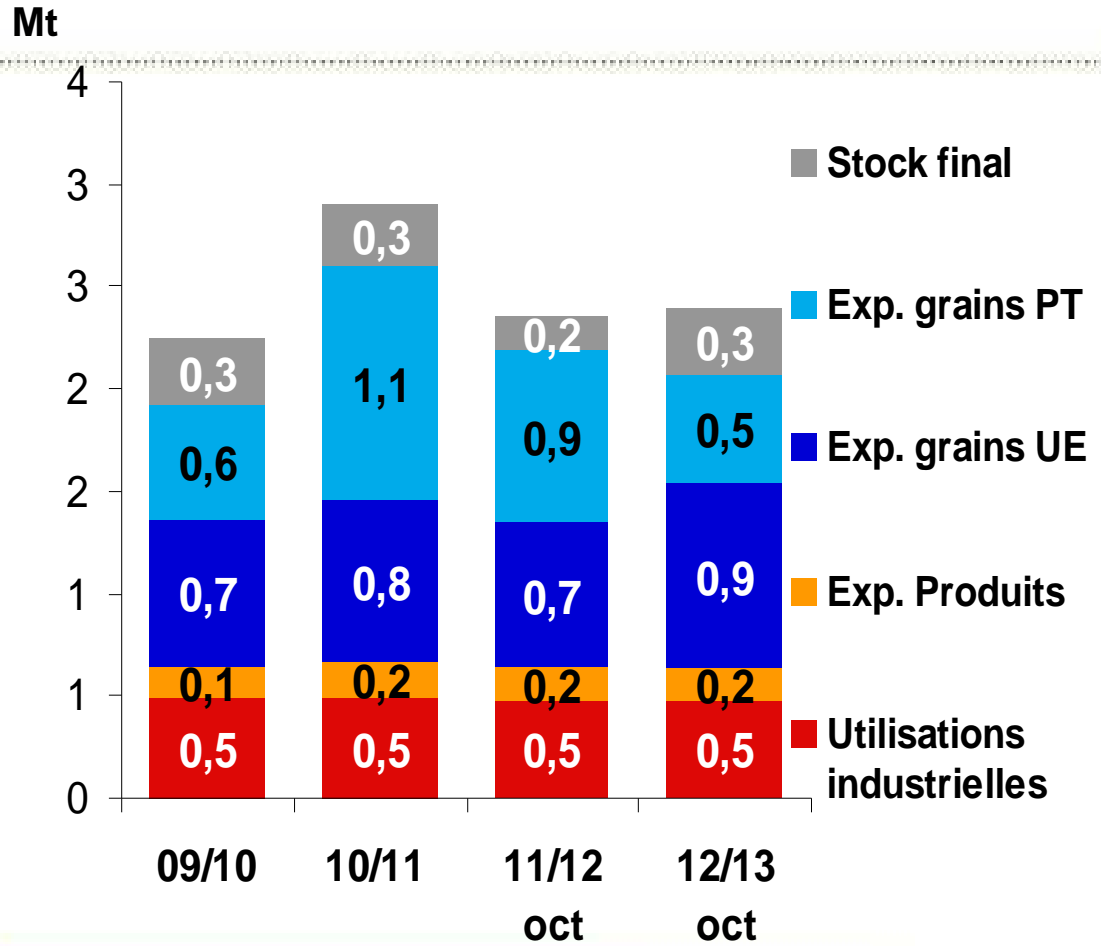
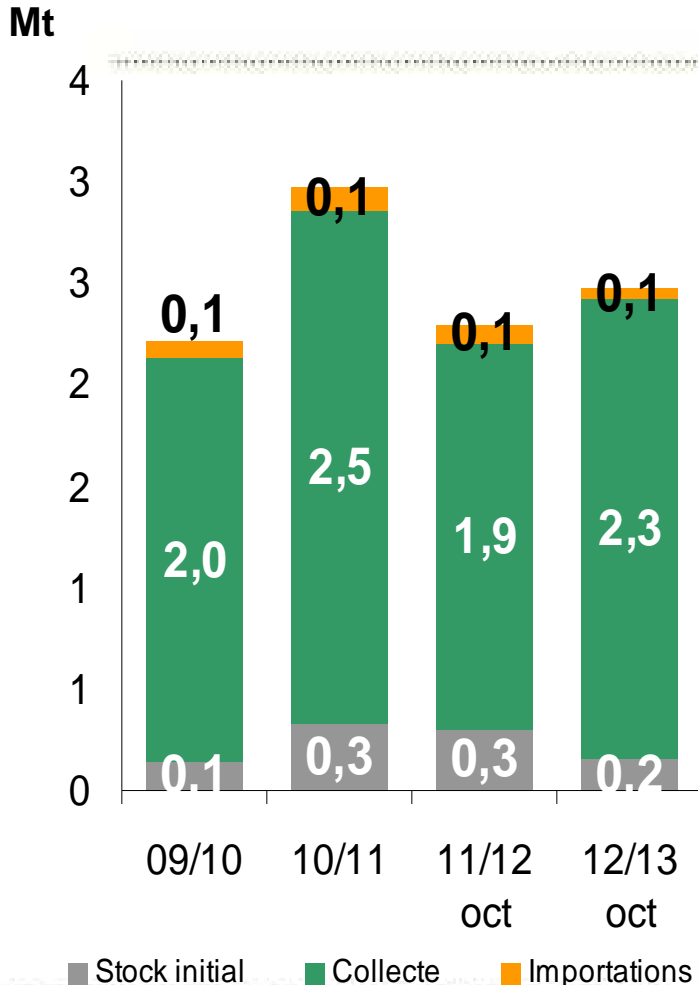
Bilan orges



Bilan maïs

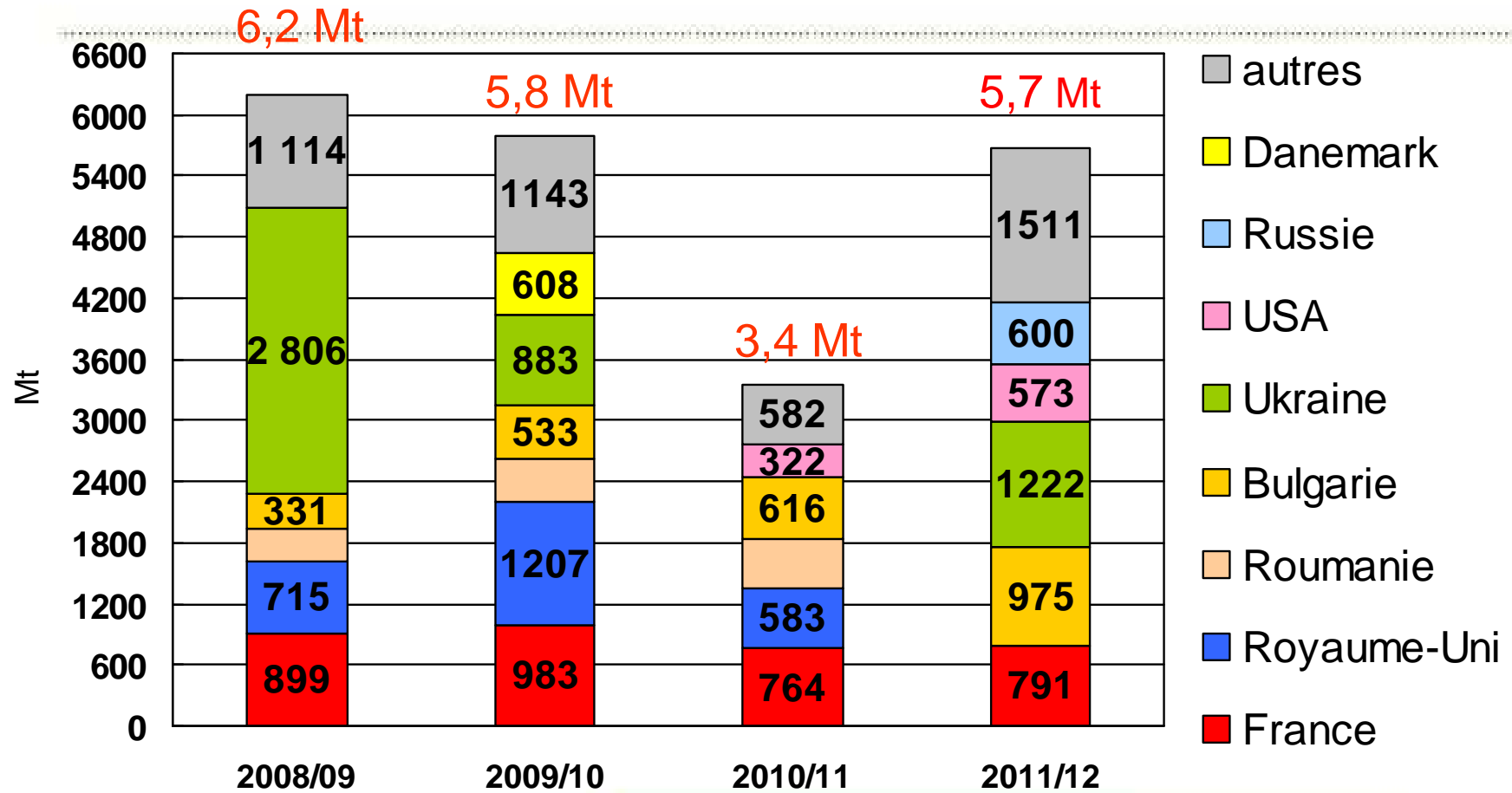


Bilan blé dur





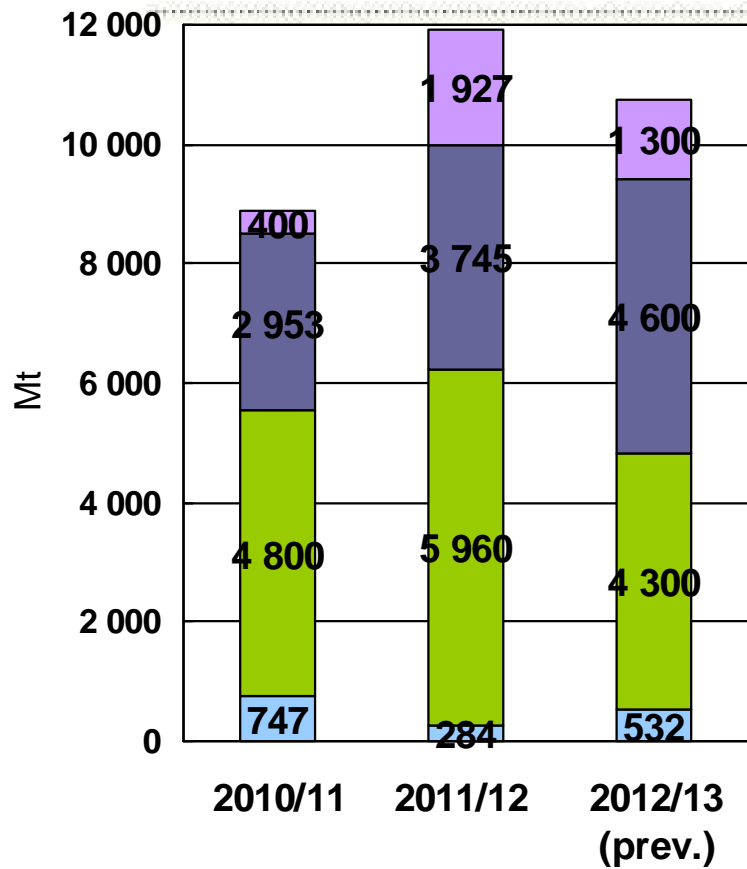
Principaux fournisseurs de l'Espagne en BLE TENDRE



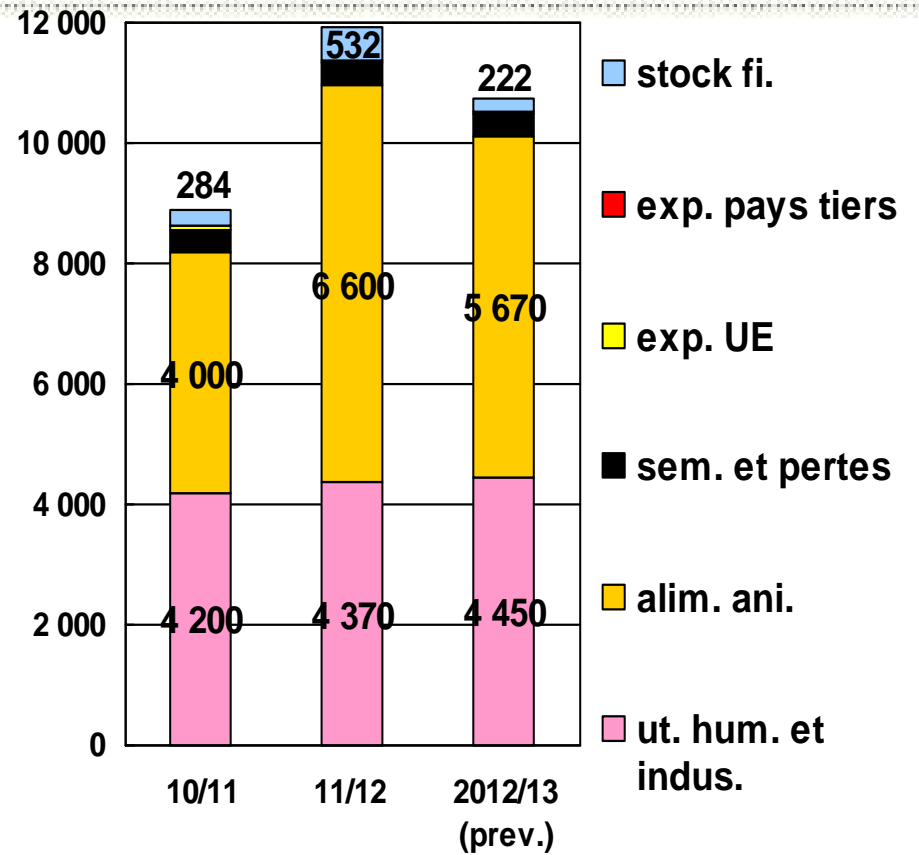
Espagne - bilan BLE TENDRE

Total disponible 12/13 : 10 732 Mt

Total utilisation 12/13 : 10 732 Mt

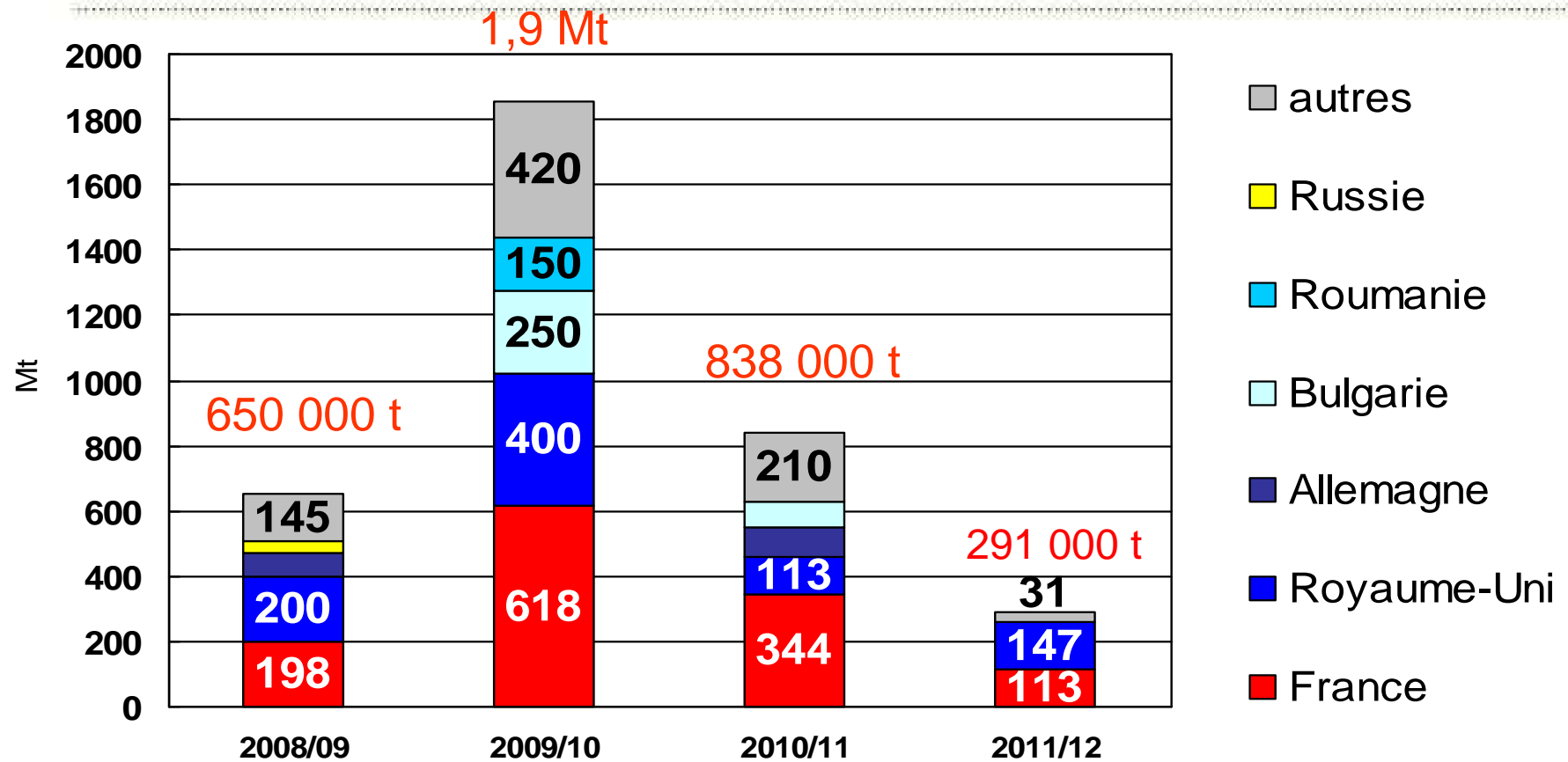


- imp. pays tiers
- imp. UE
- prod.
- stock ini.



- stock fi.
- exp. pays tiers
- exp. UE
- sem. et pertes
- alim. ani.
- ut. hum. et indus.

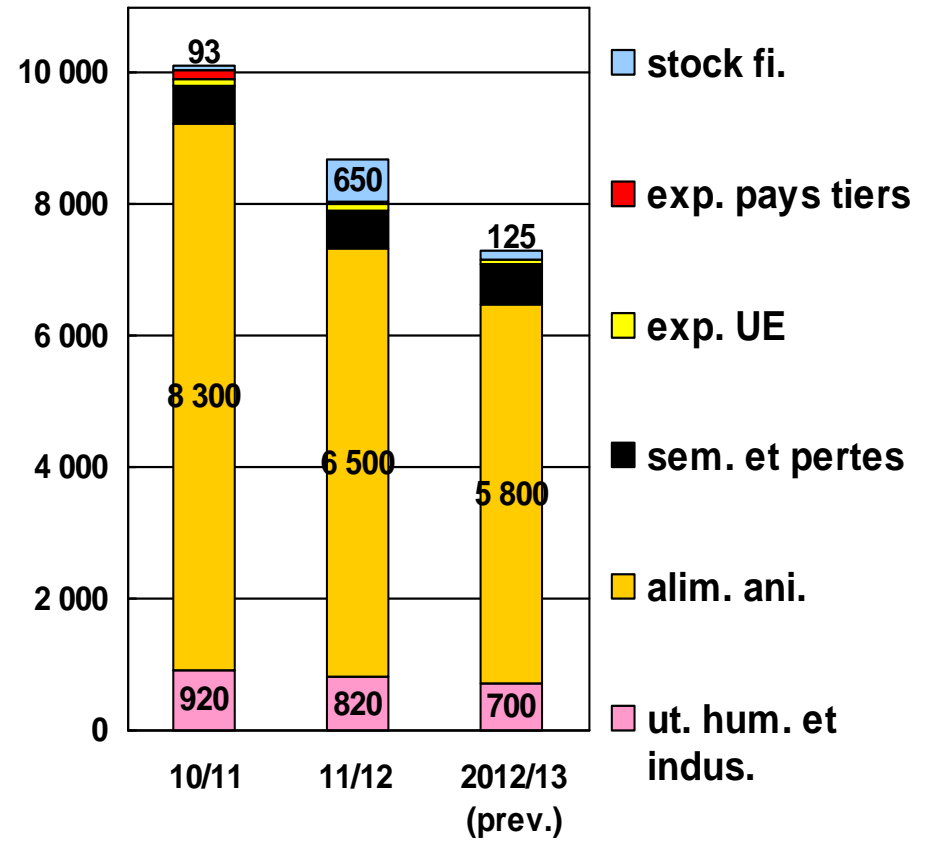
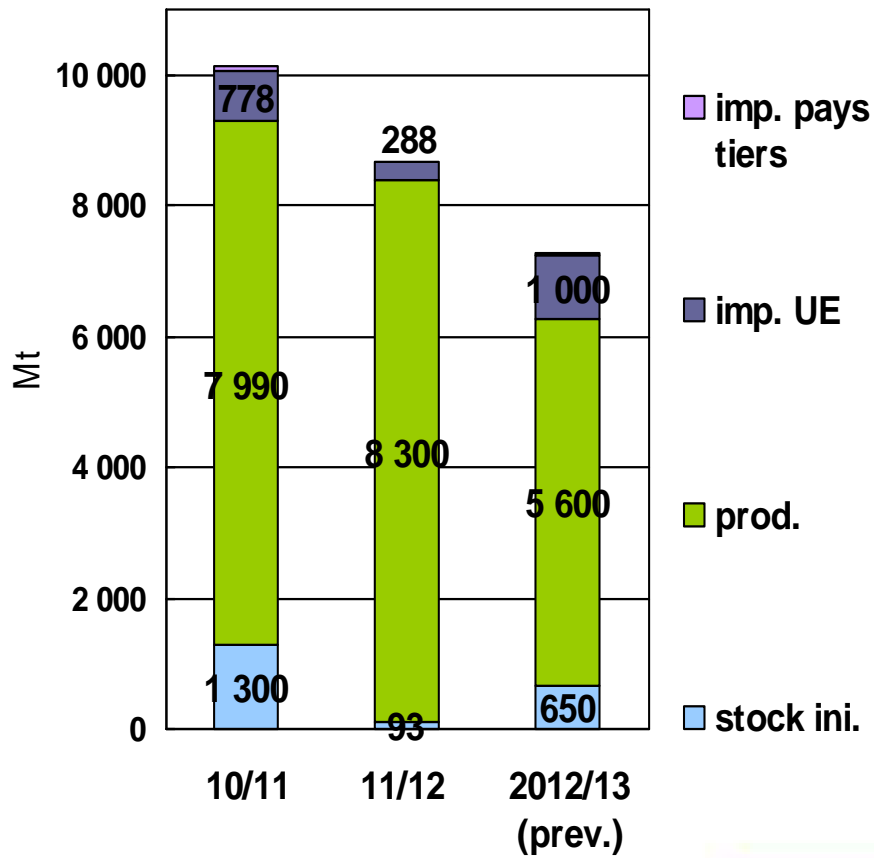
Principaux fournisseurs de l'Espagne en ORGE



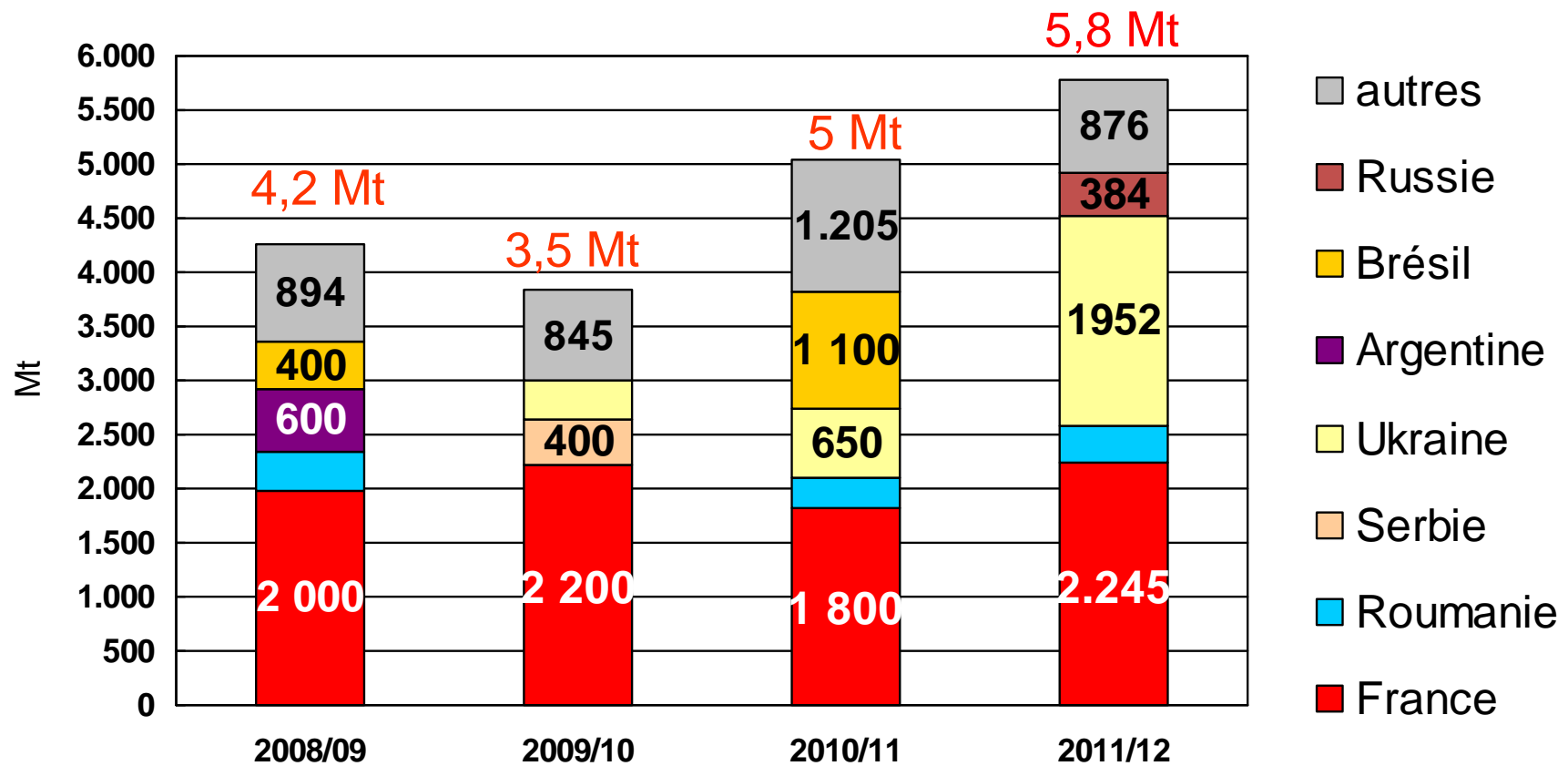
Espagne - bilan ORGE

Total disponible 12/13 : 7 290 Mt

Total utilisation 12/13 : 7 290 Mt



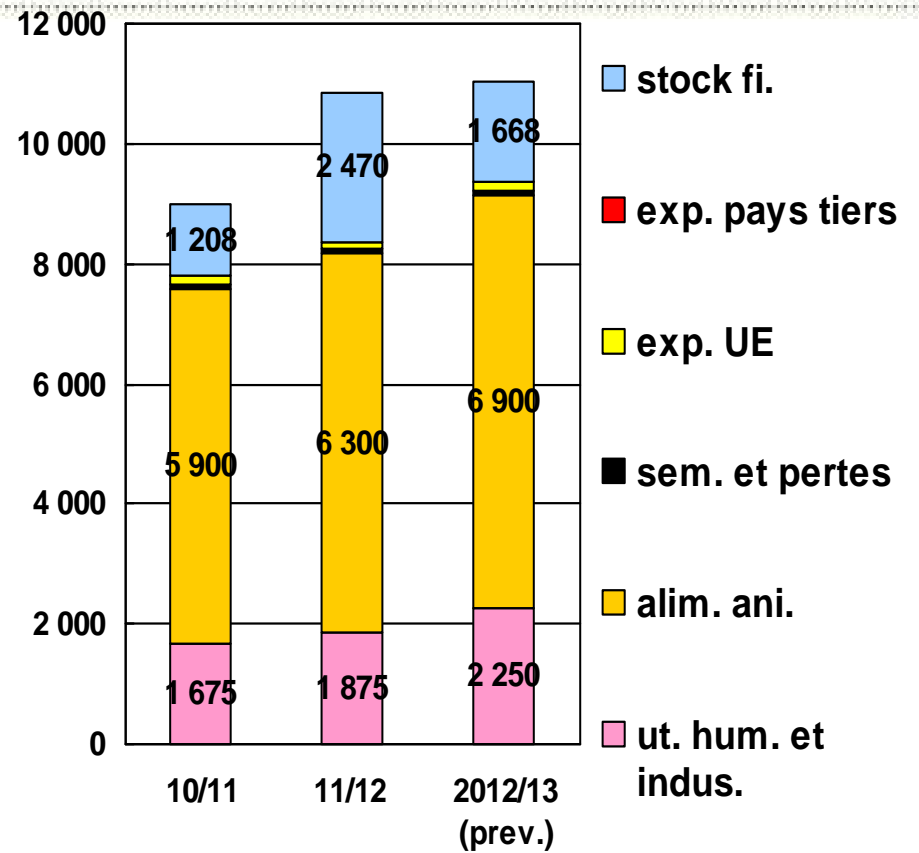
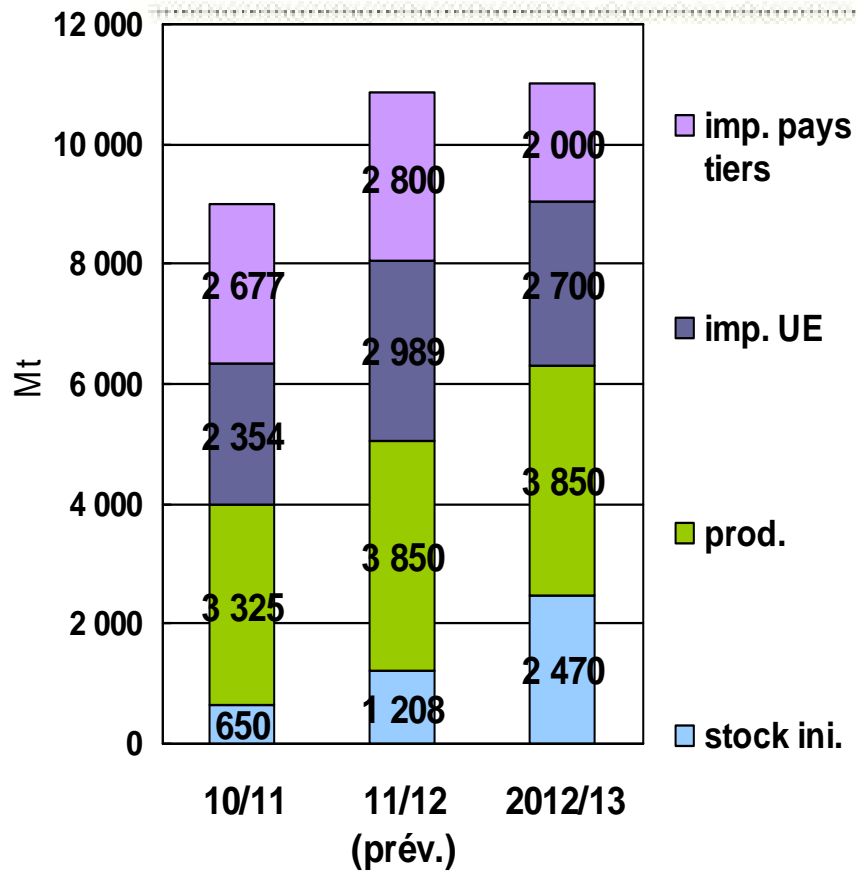
Principaux fournisseurs de l'Espagne en MAIS



Espagne - bilan MAIS

Total disponible 12/13 : 11 020 Mt

Total utilisation 12/13 : 11 020 Mt





¿ Y ahora ?

¡Gracias por su atención!

