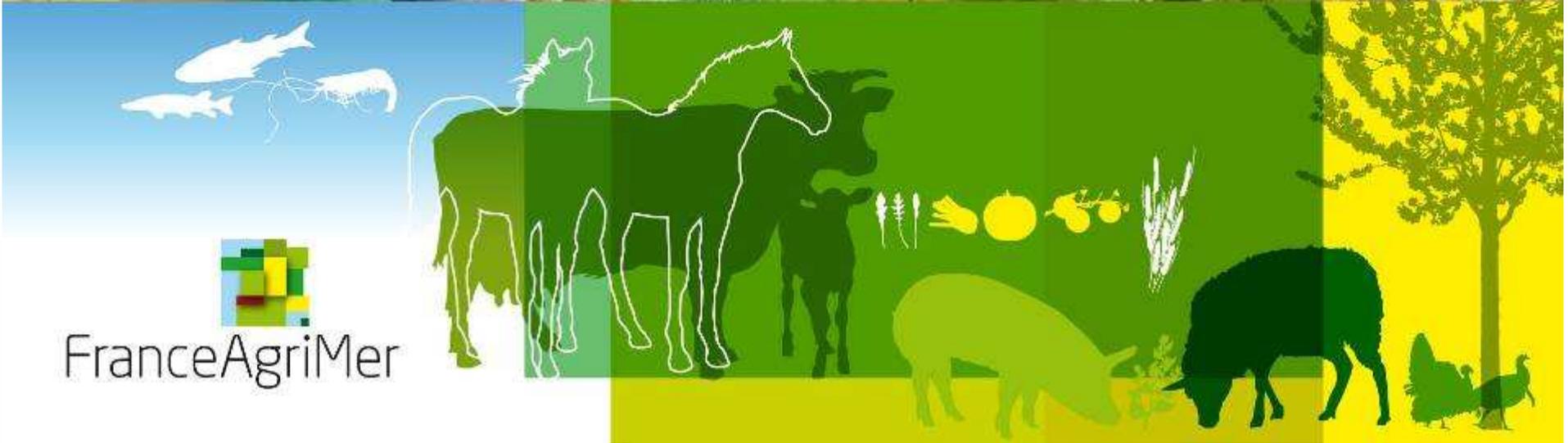


CÉRÉALES /
FRUITS ET LÉGUMES /
HORTICULTURE /
LAIT /
OLÉO-PROTÉAGINEUX /
PÊCHE ET AQUACULTURE /
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /
SUCRE /
VIANDES BLANCHES /
VIANDES ROUGES /
VINS /

FranceAgriMer



FranceAgriMer

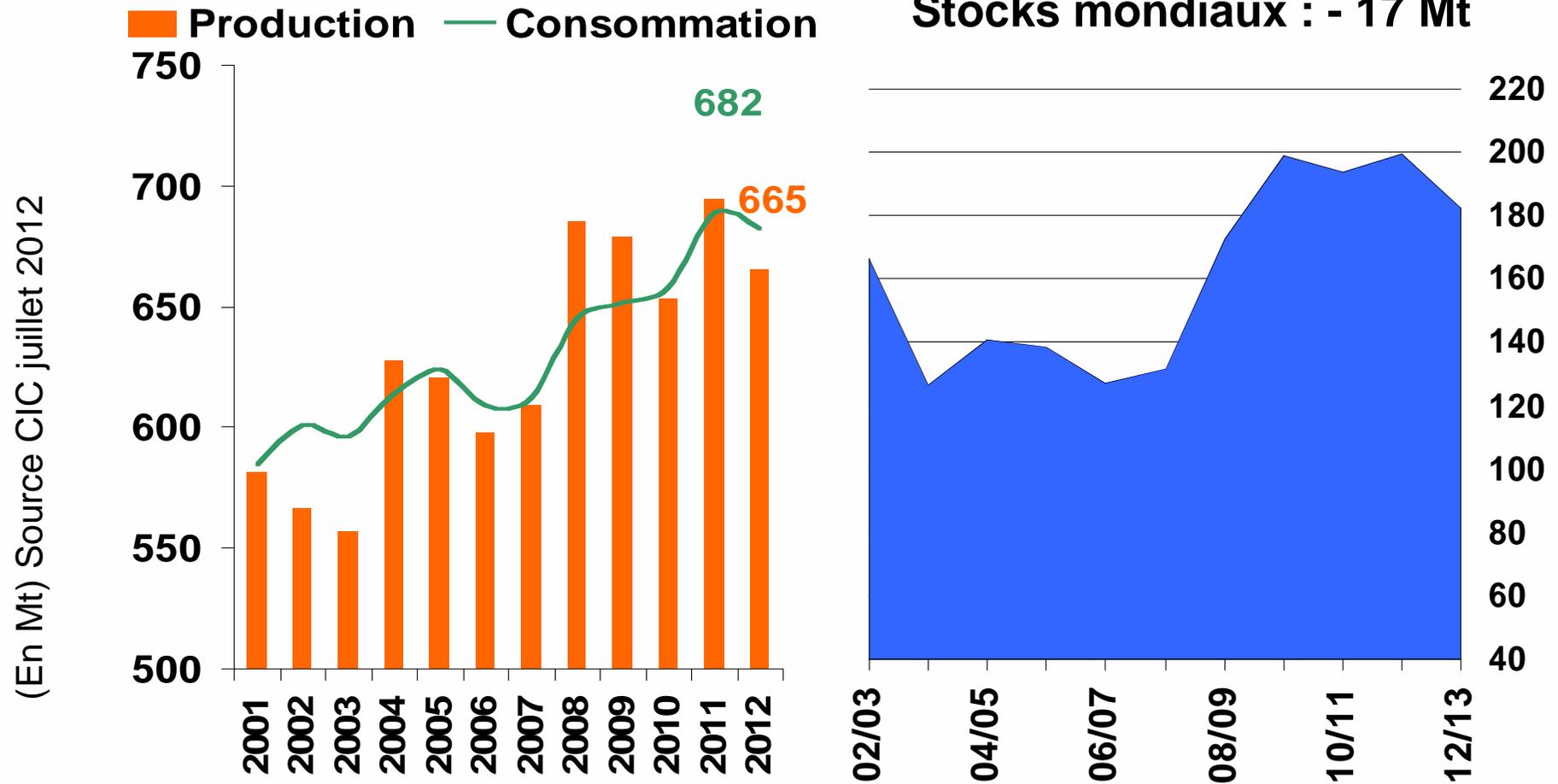


Points clefs

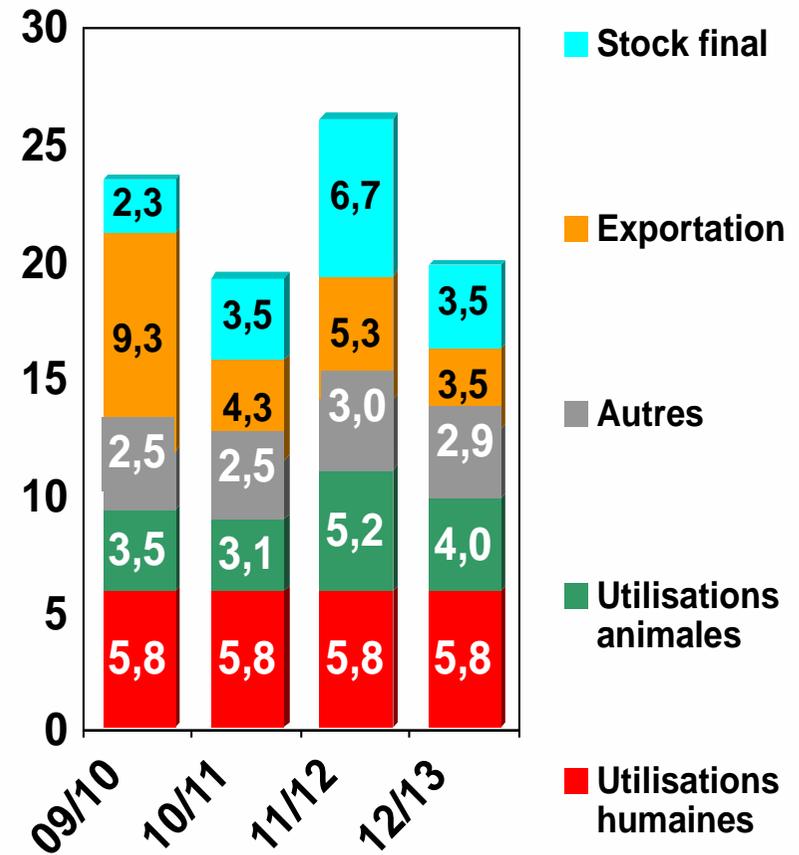
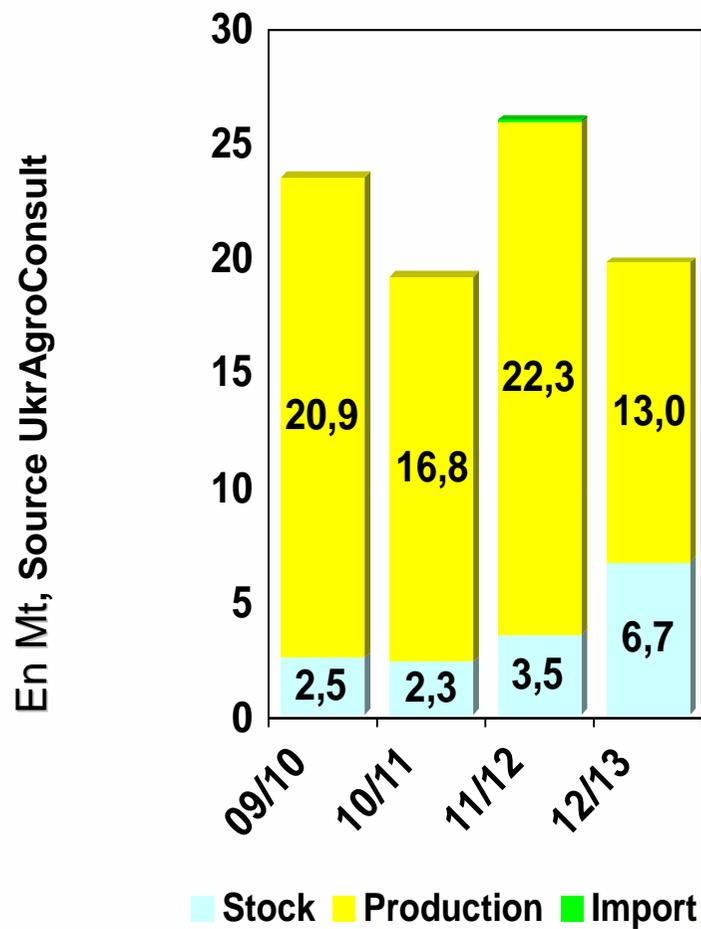
- Sécheresses...
- Inondations...
- Perspectives favorables pour l'UE et la France
- Forte hausses des cours mondiaux

Bilan mondial blé 2012/13

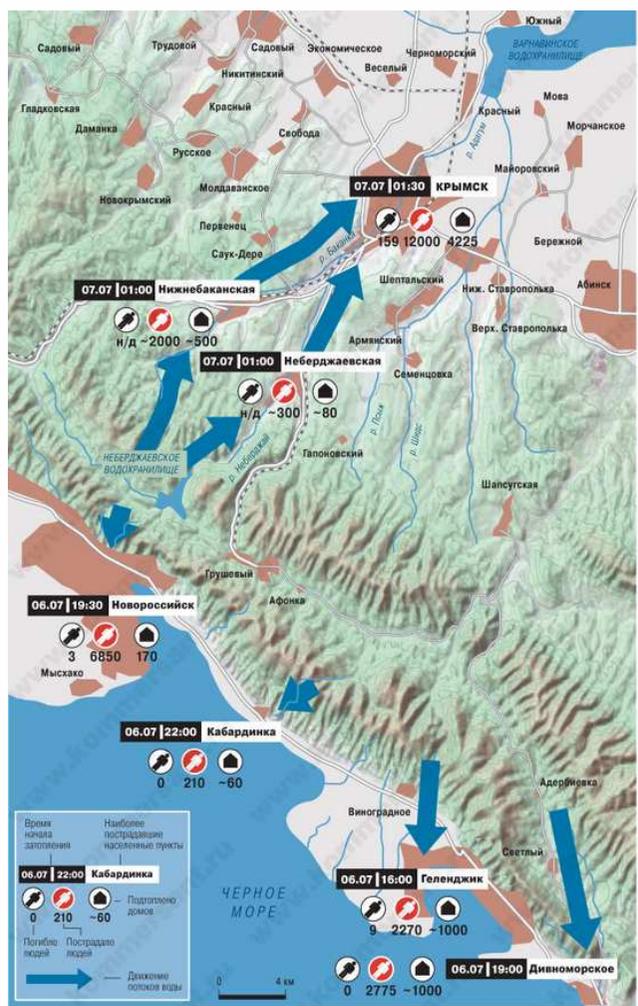
Stocks mondiaux : - 17 Mt



Ukraine : Bilan blé



Inondations dans le sud de la Russie (Région de Krasnodar)

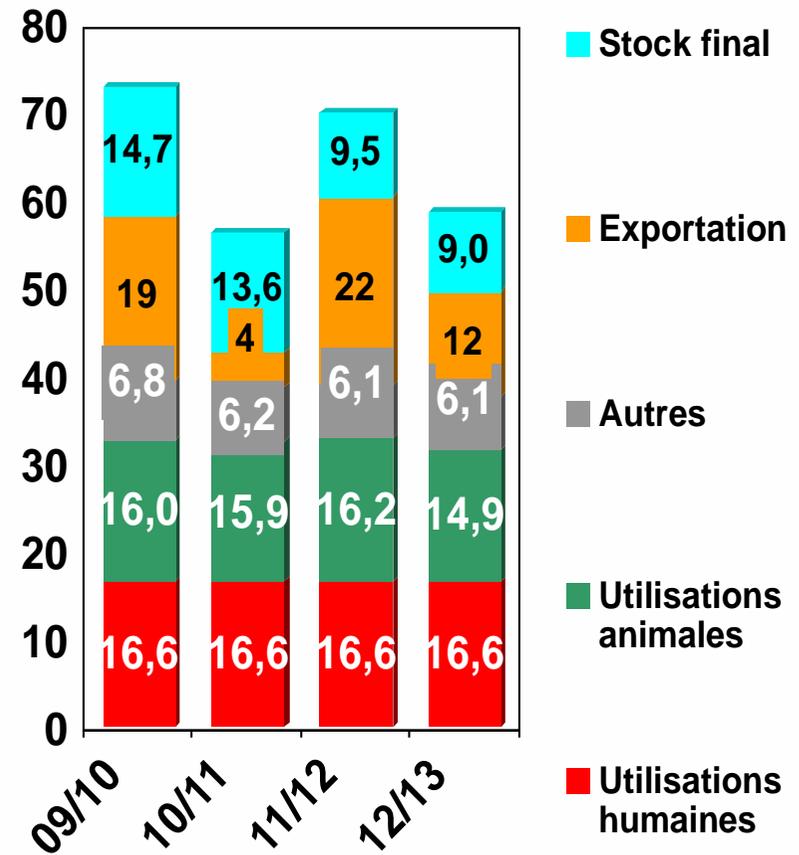
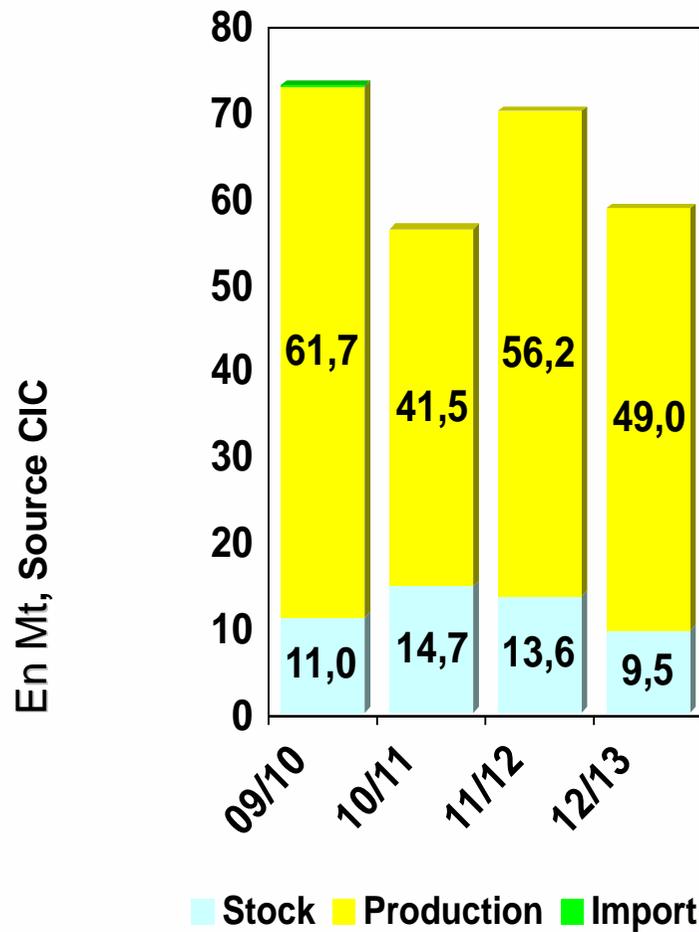




Le port de Novorossisk



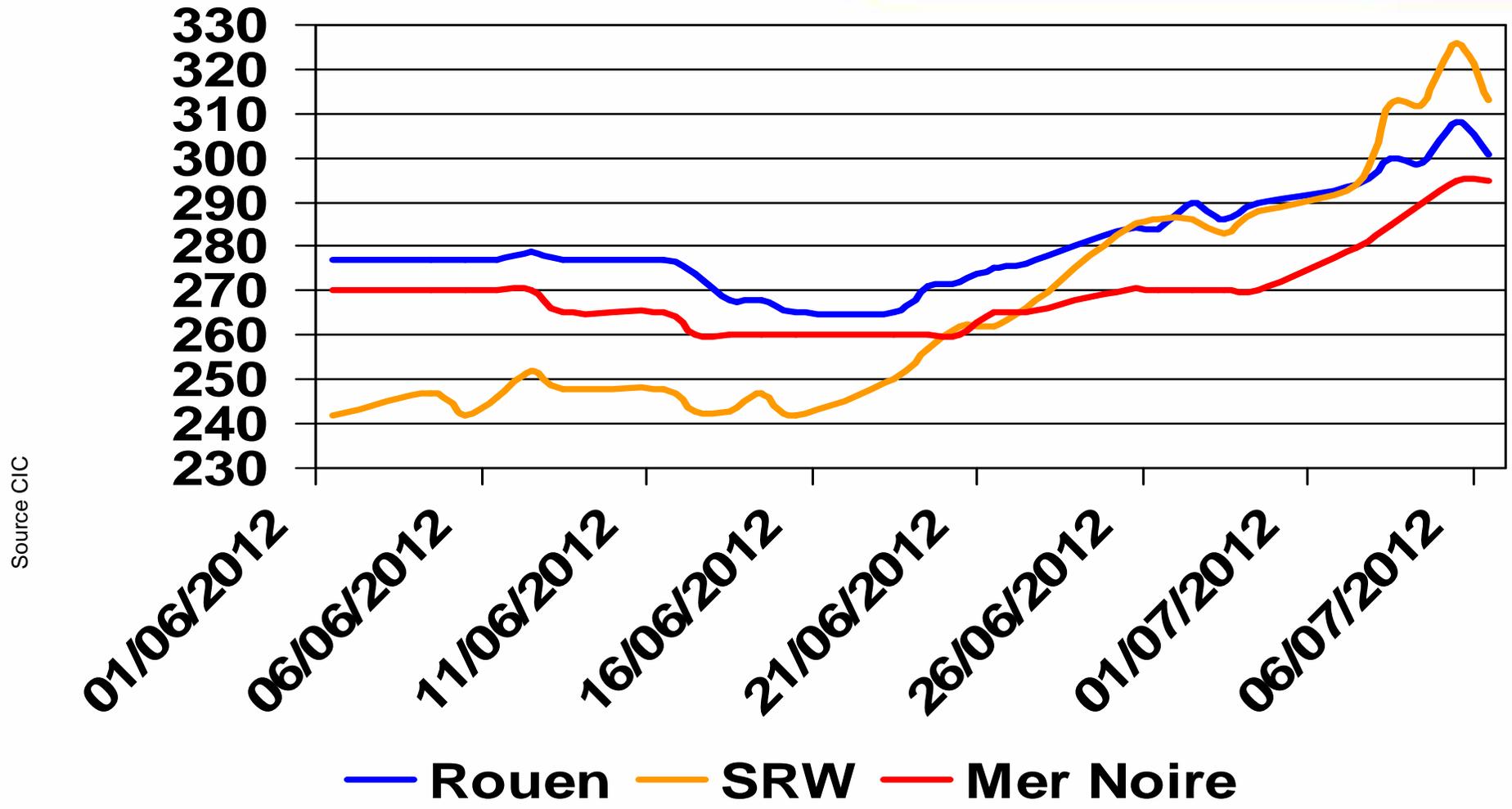
Russie: Bilan blé



La Méditerranée en déficit

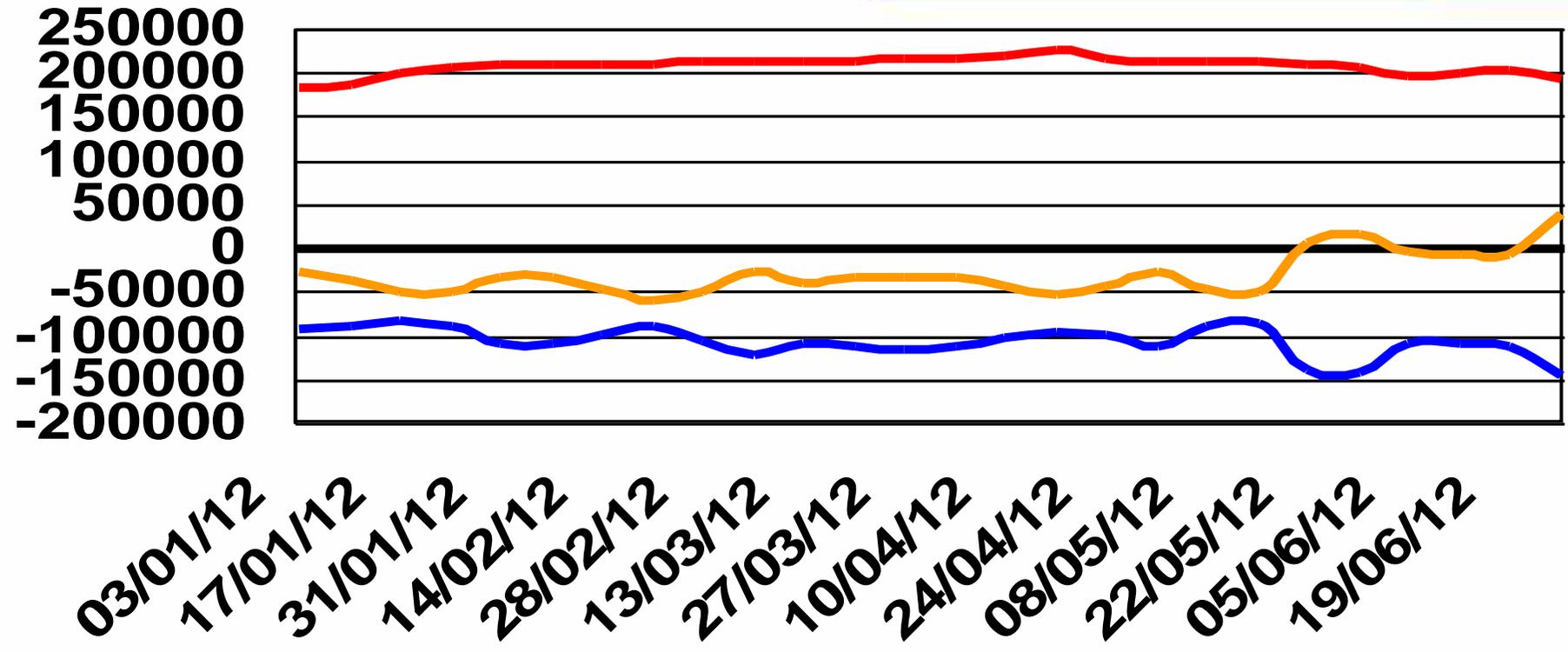
Source CIC, en Mt	Importations	Exportations
Europe	7,7	16,3
CEI	6,5	25,0
Proche et Moyen-Orient	19,0	3,7
Algérie	5,1	0
Maroc	5,3	0
Tunisie	1,8	0
Libye	1,6	0
Egypte	10,1	0
Total	57,0	45,0

Blé : Cours mondiaux



Source CIC

Blé Chicago positions nettes

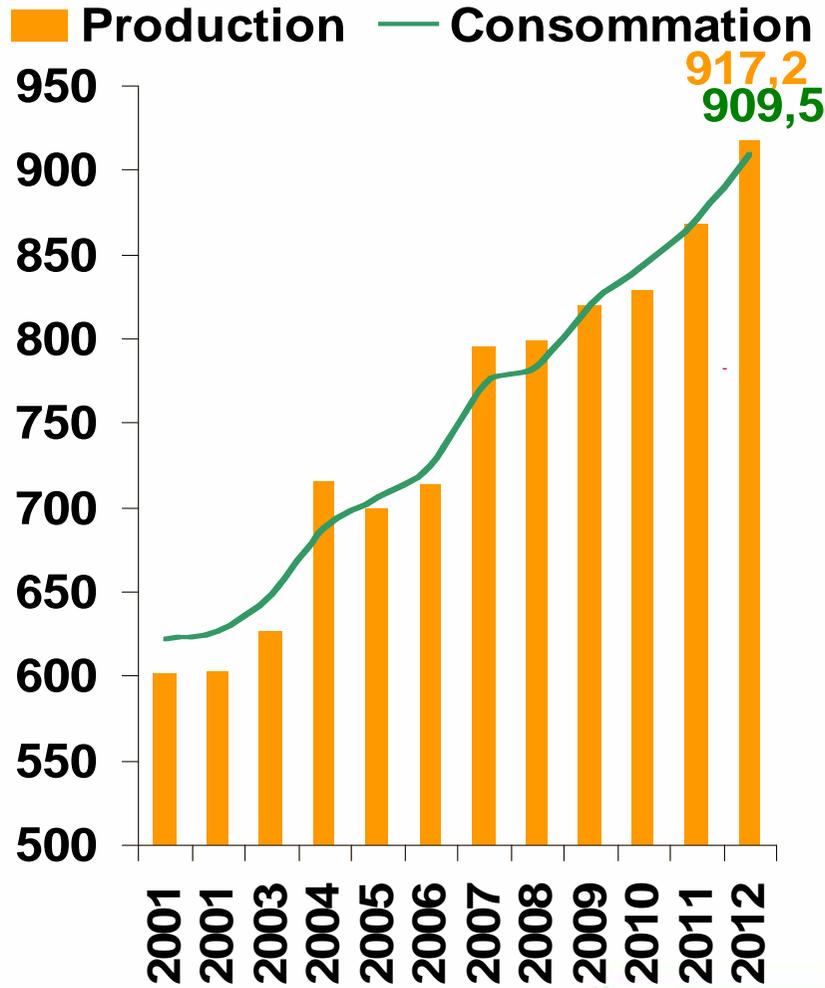


Source CIC

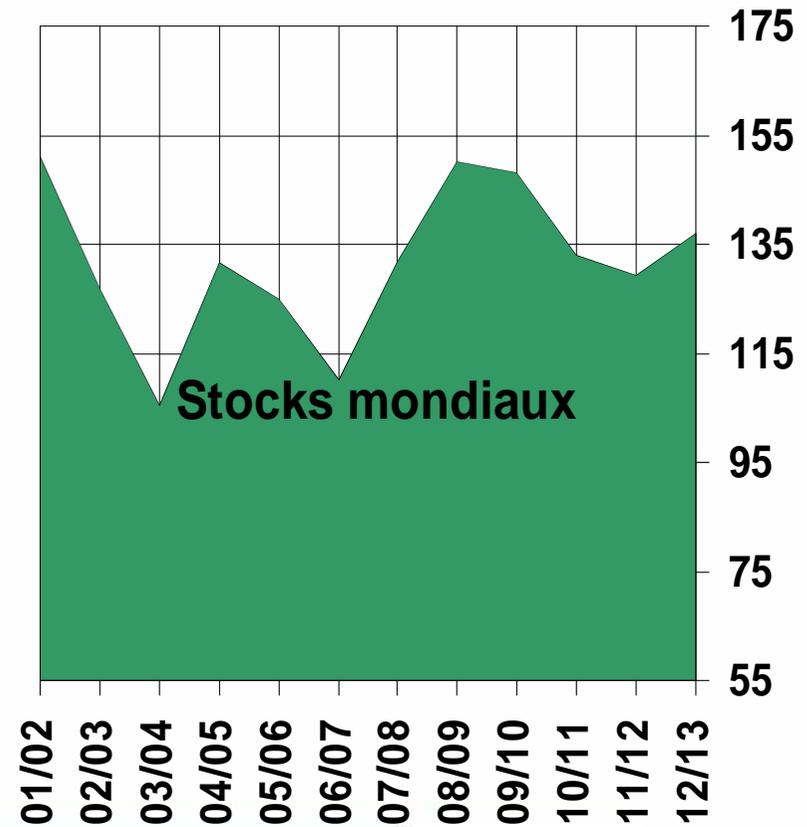
- Positions nettes commerçants et industriels
- Positions nettes des gestionnaires de fonds
- Position nette fonds indiciels



Bilan mondial du maïs



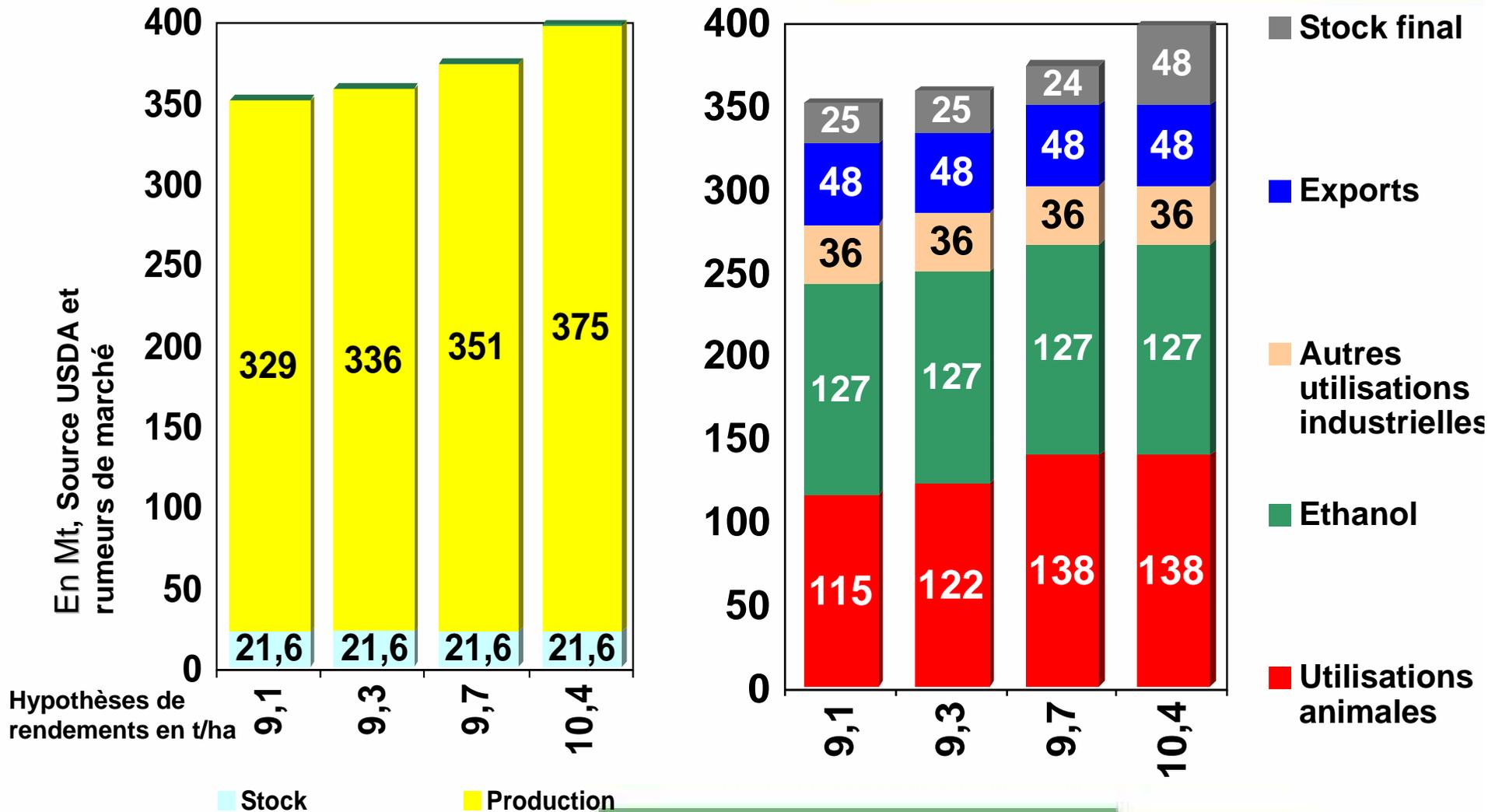
Stocks mondiaux +6 Mt



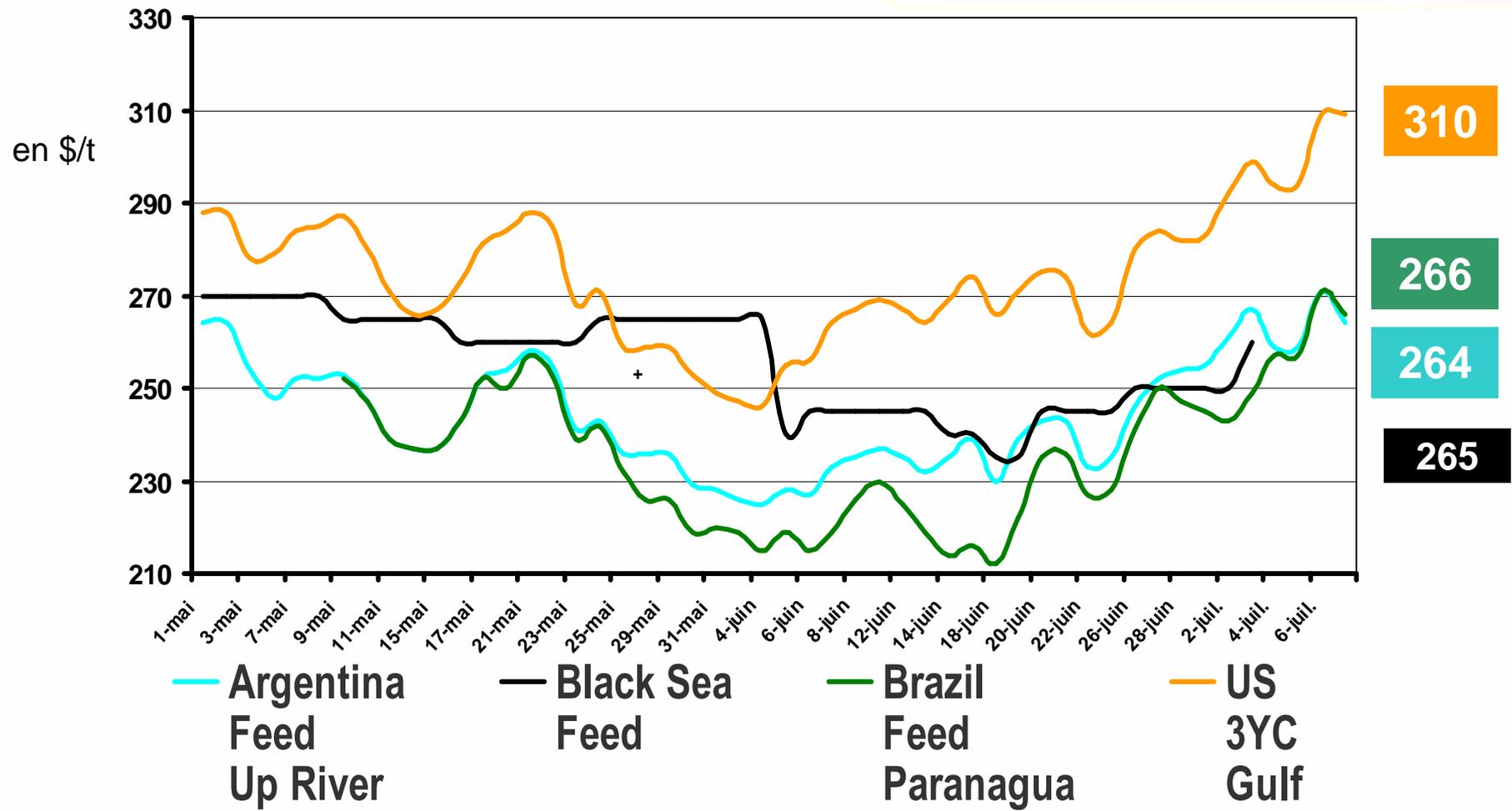
Source CIC



Etats Unis, bilans maïs sur la base de surfaces récoltées de 36,1 Mha

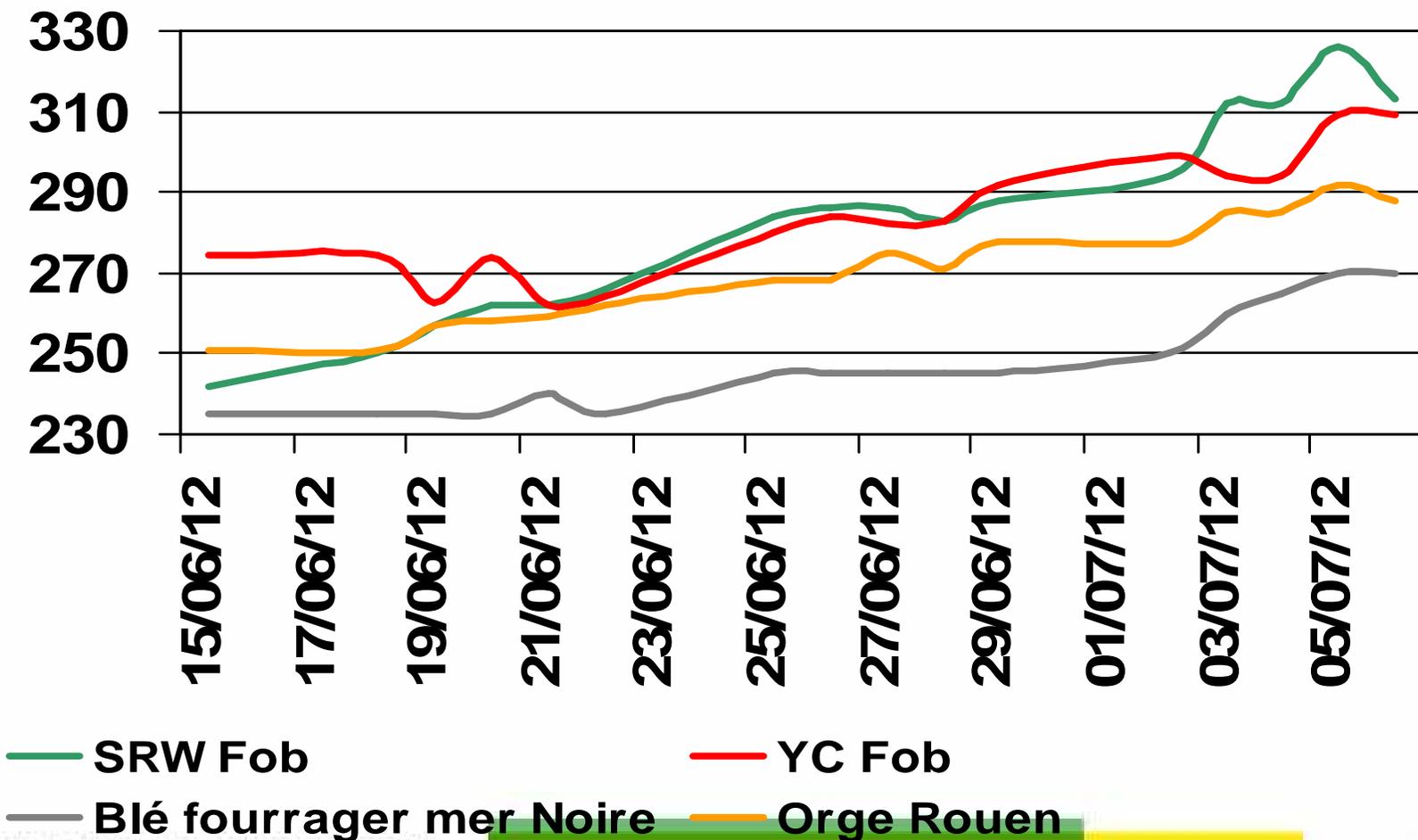


Prix du maïs FOB

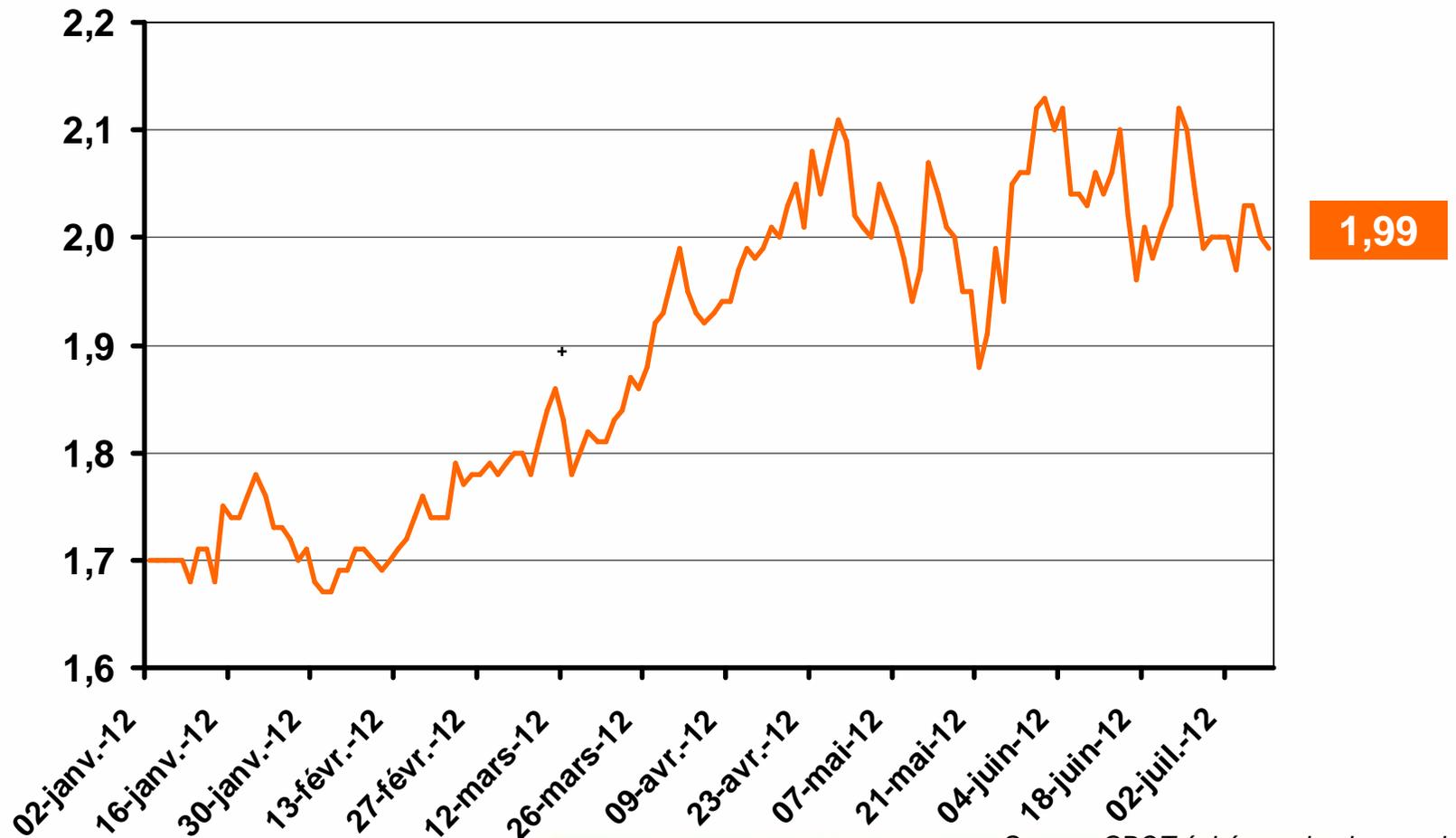


Source: CIC

Prix des céréales fourragères



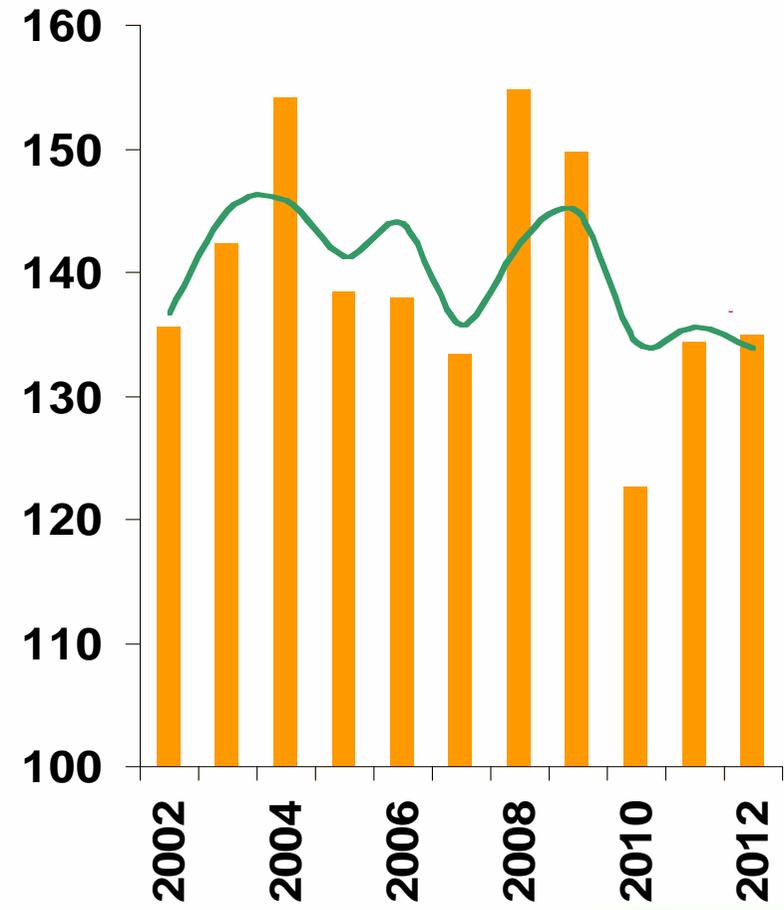
Rapport de prix soja/maïs aux Etats Unis



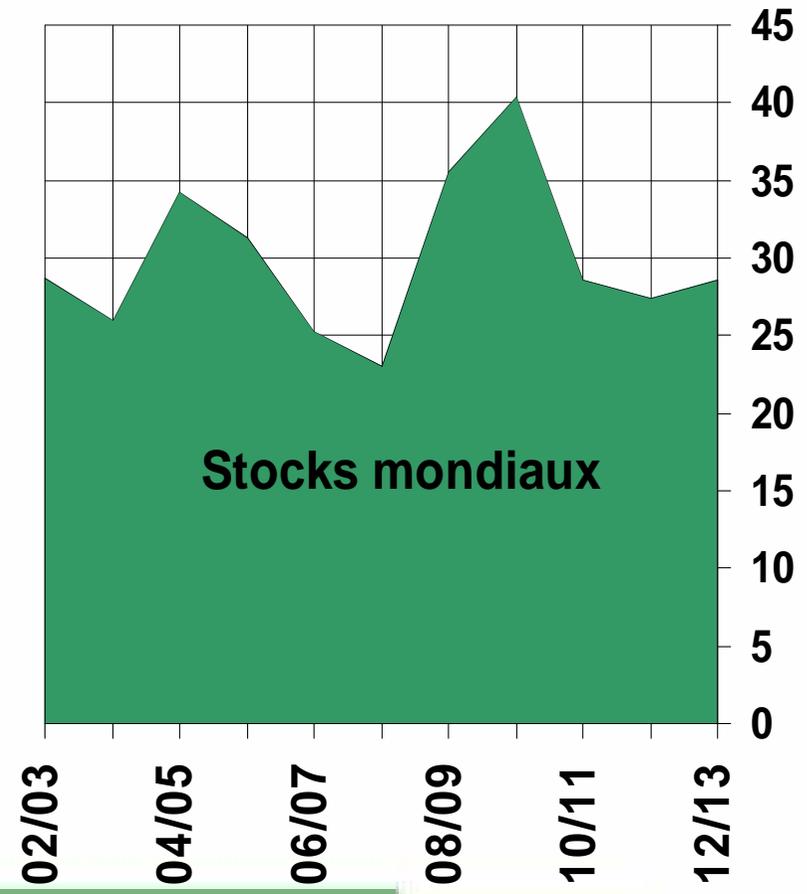
Source: CBOT échéance la plus proche

Bilan mondial de l'orge

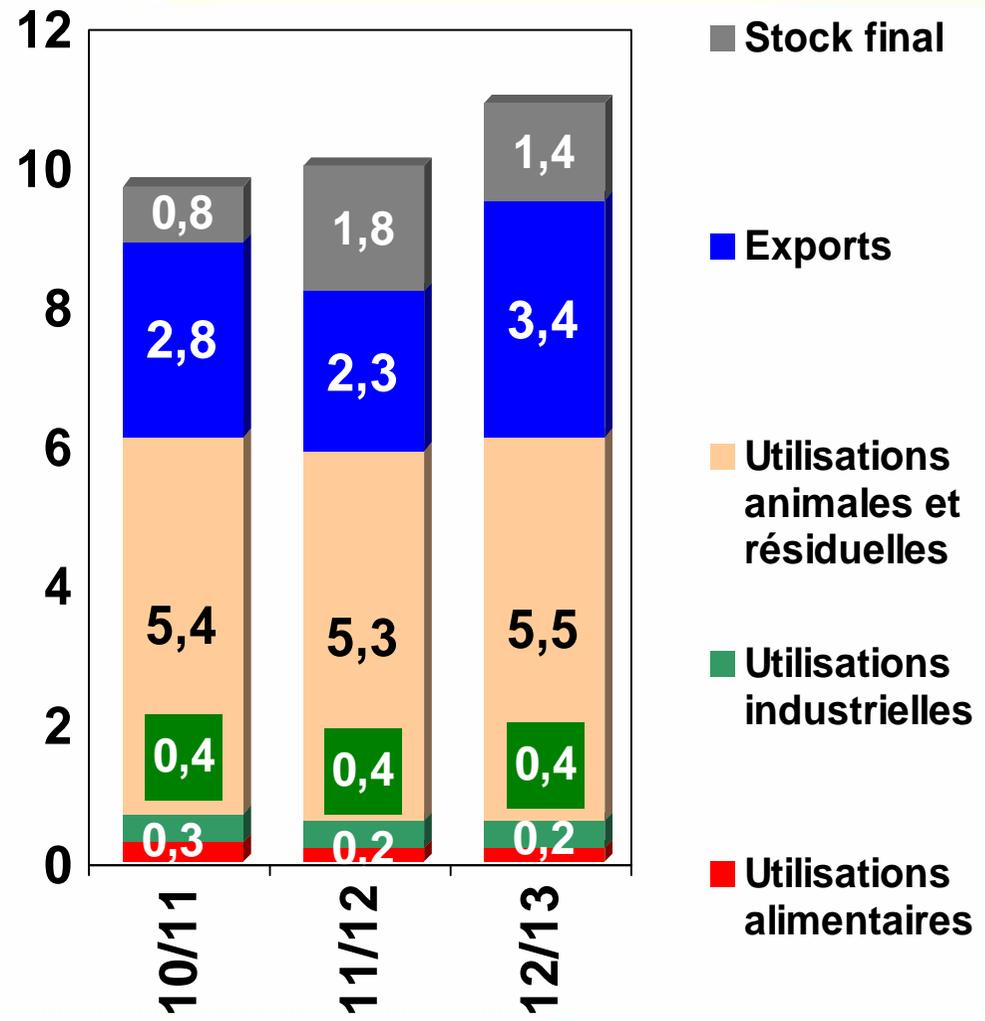
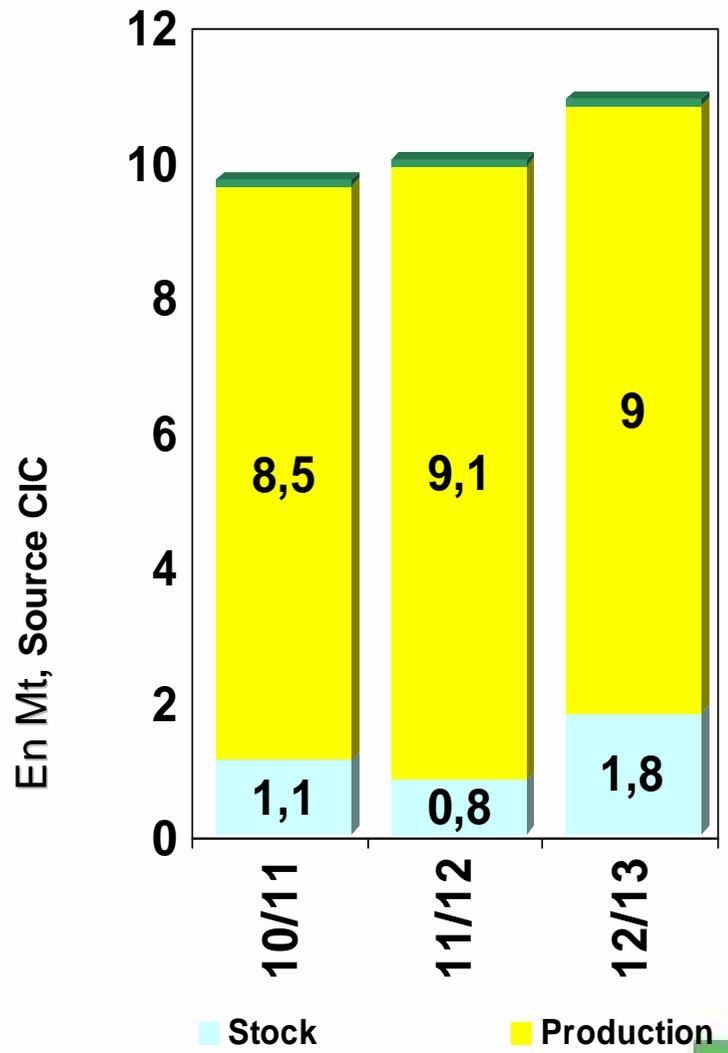
Production — Consommation



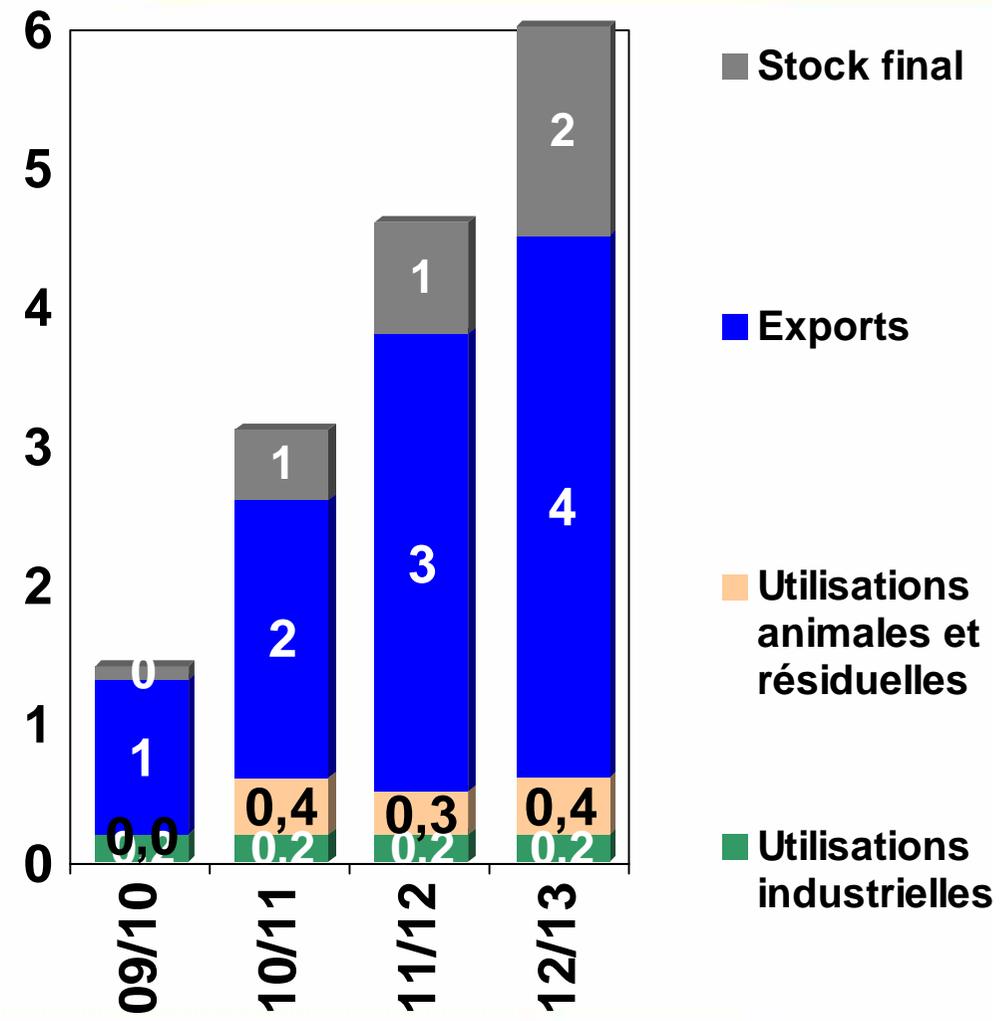
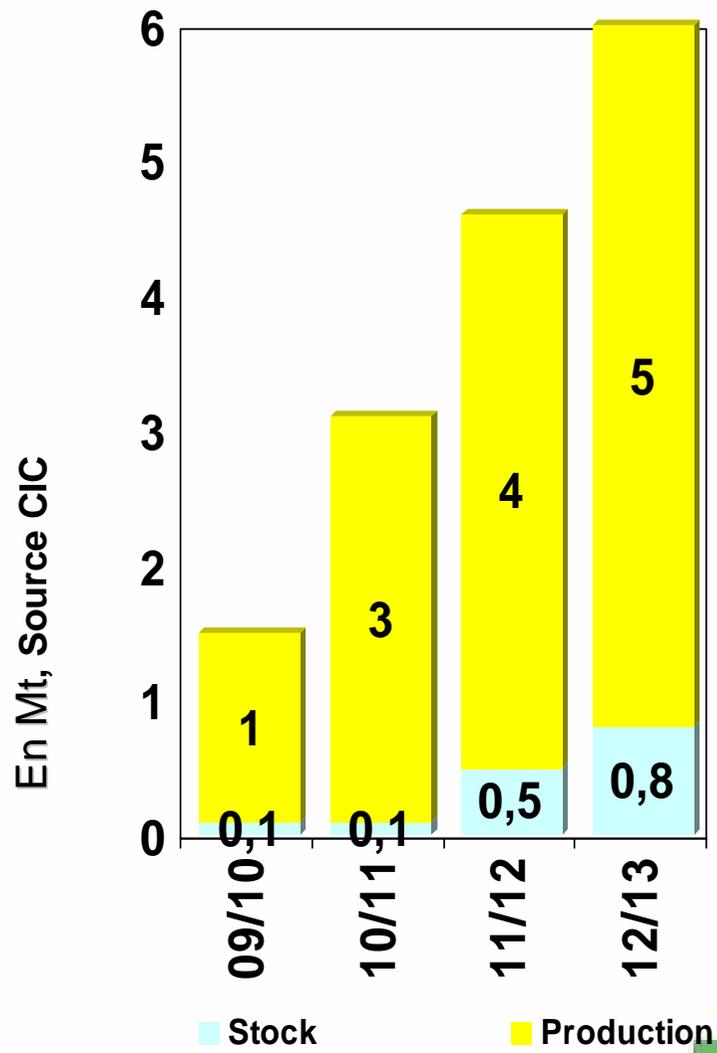
Stocks mondiaux +1 Mt



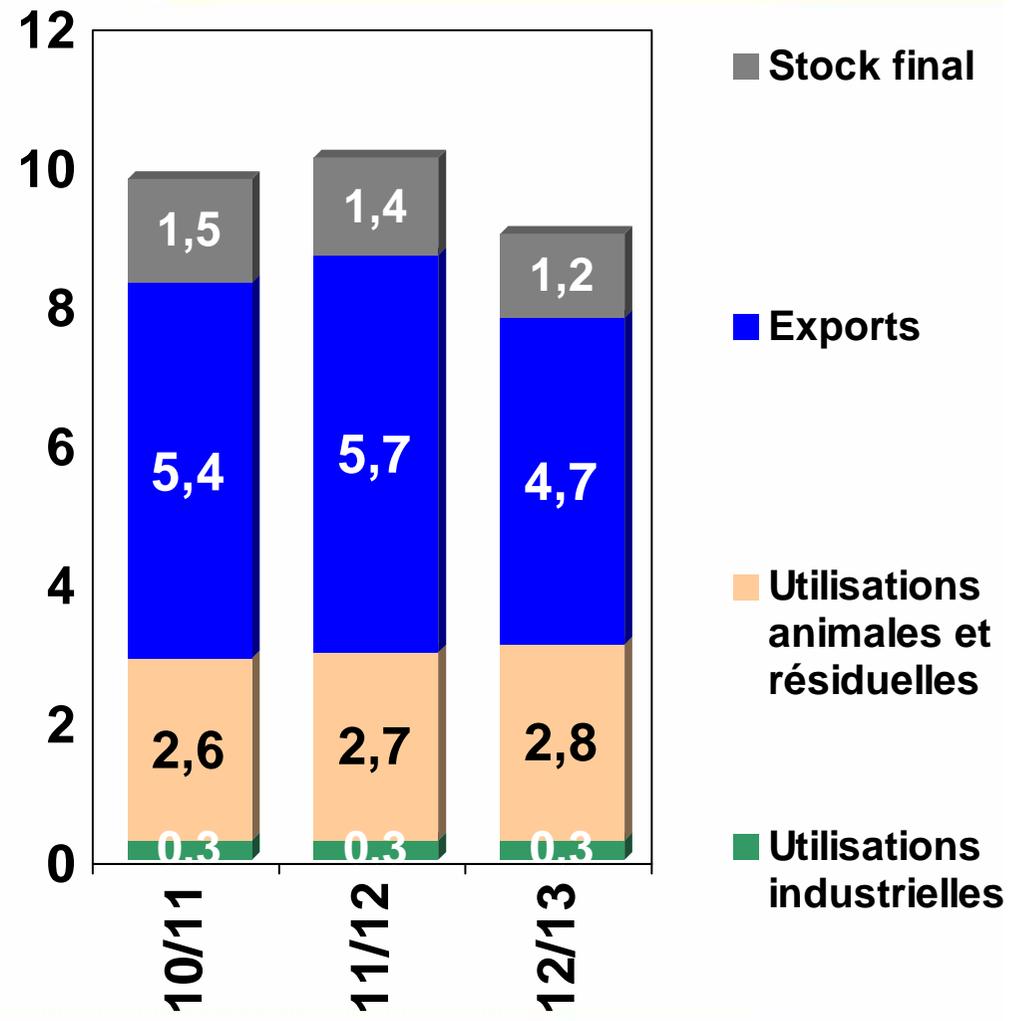
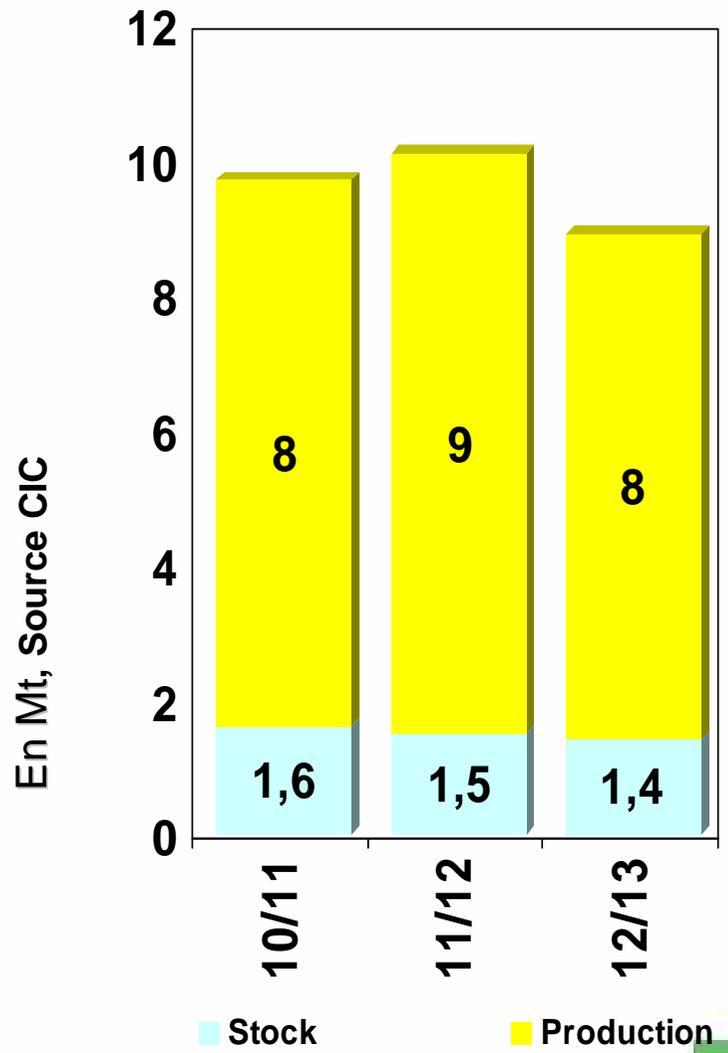
Ukraine, bilan orge



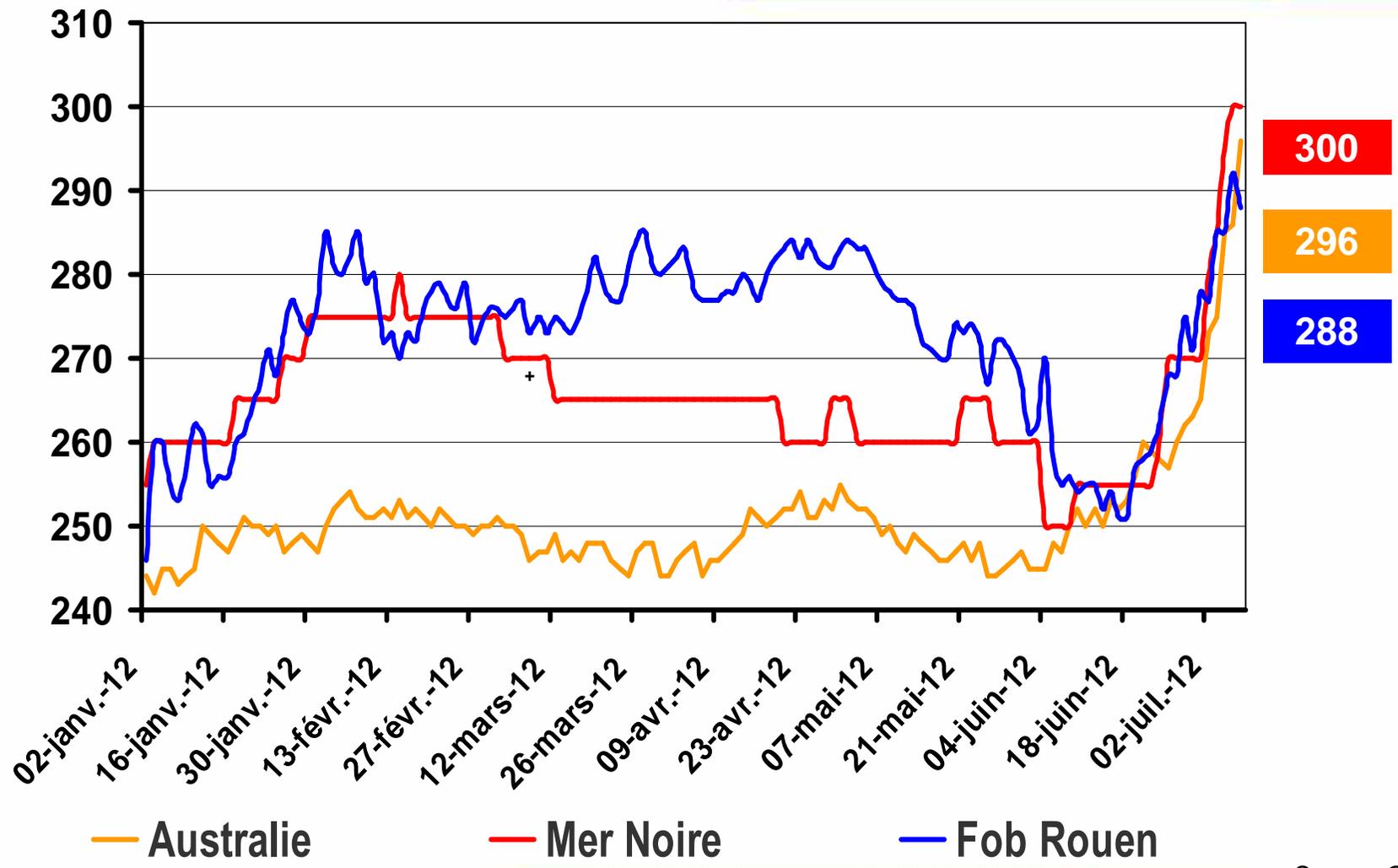
Argentine, bilan orge



Australie, bilan orge



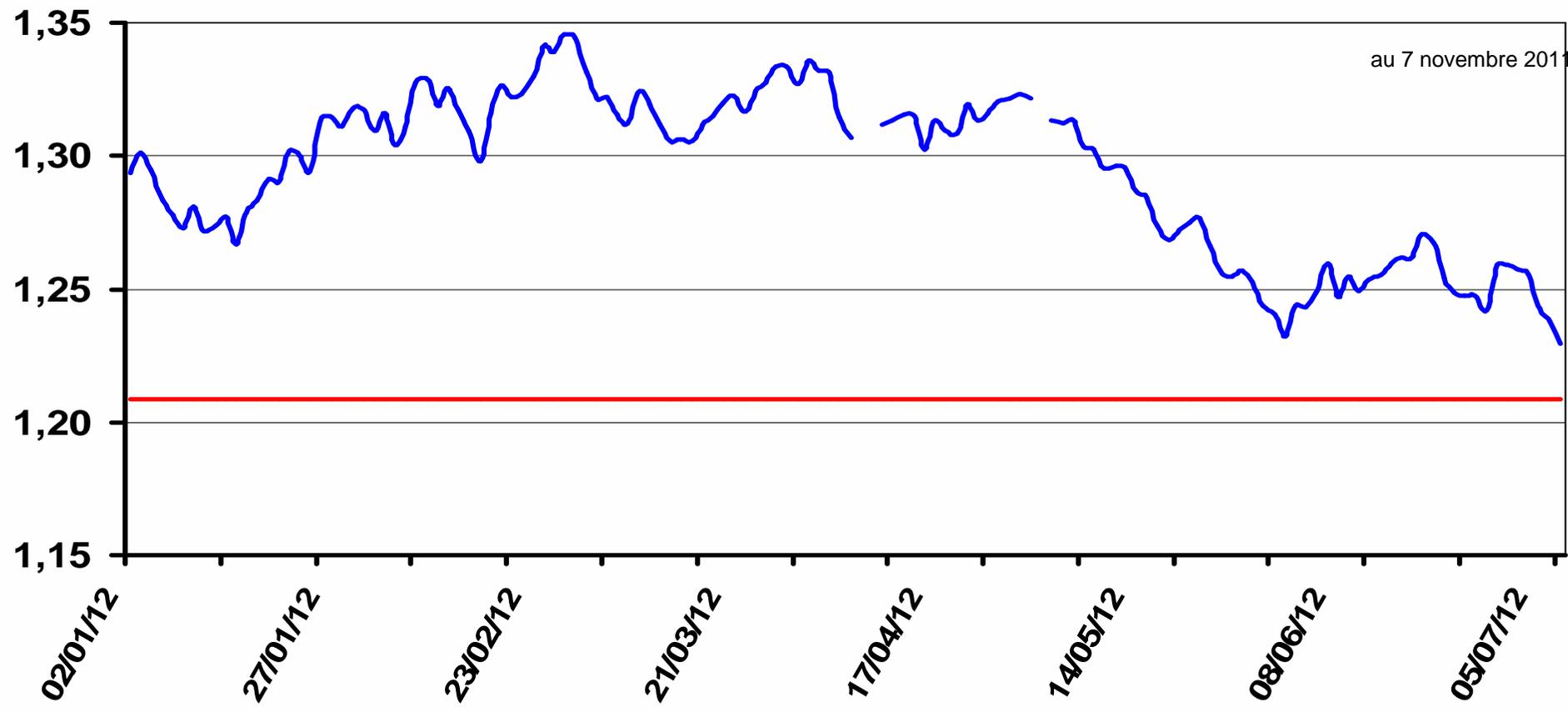
Prix de l'orge



Taux de change Euro / \$

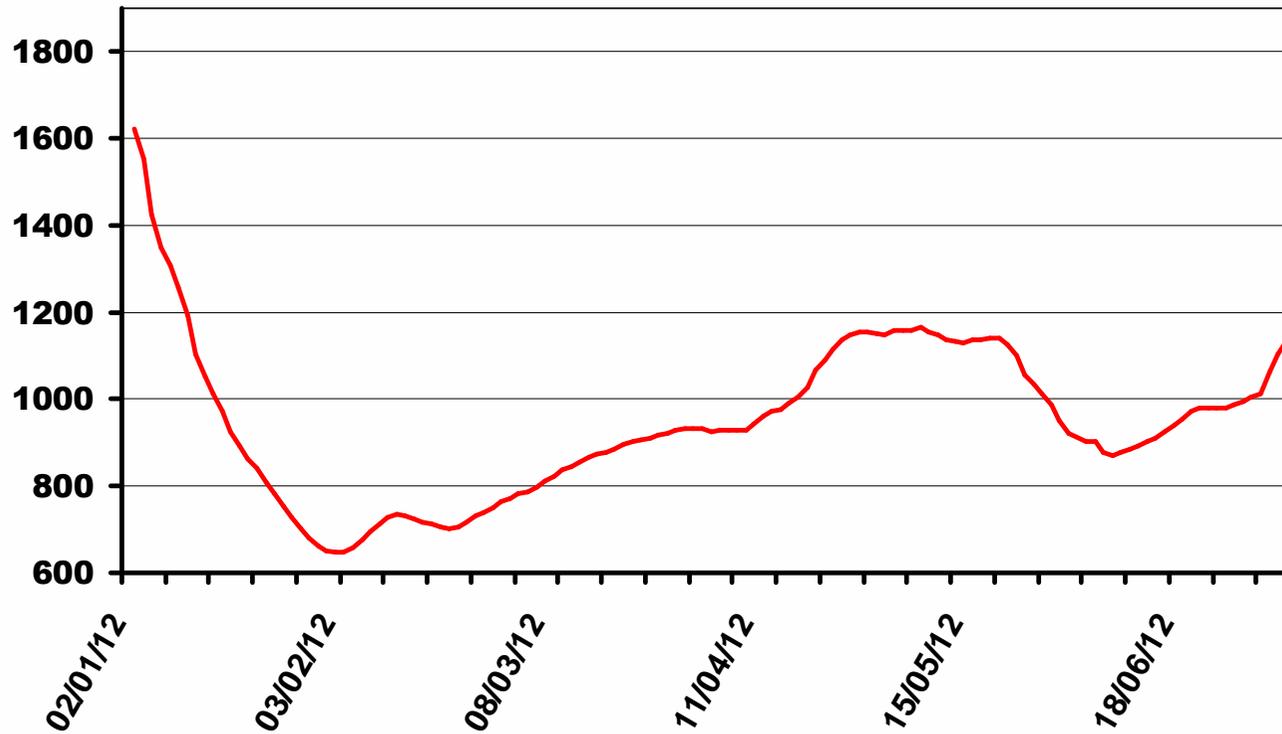
1 € = 1,2293

au 7 novembre 2011

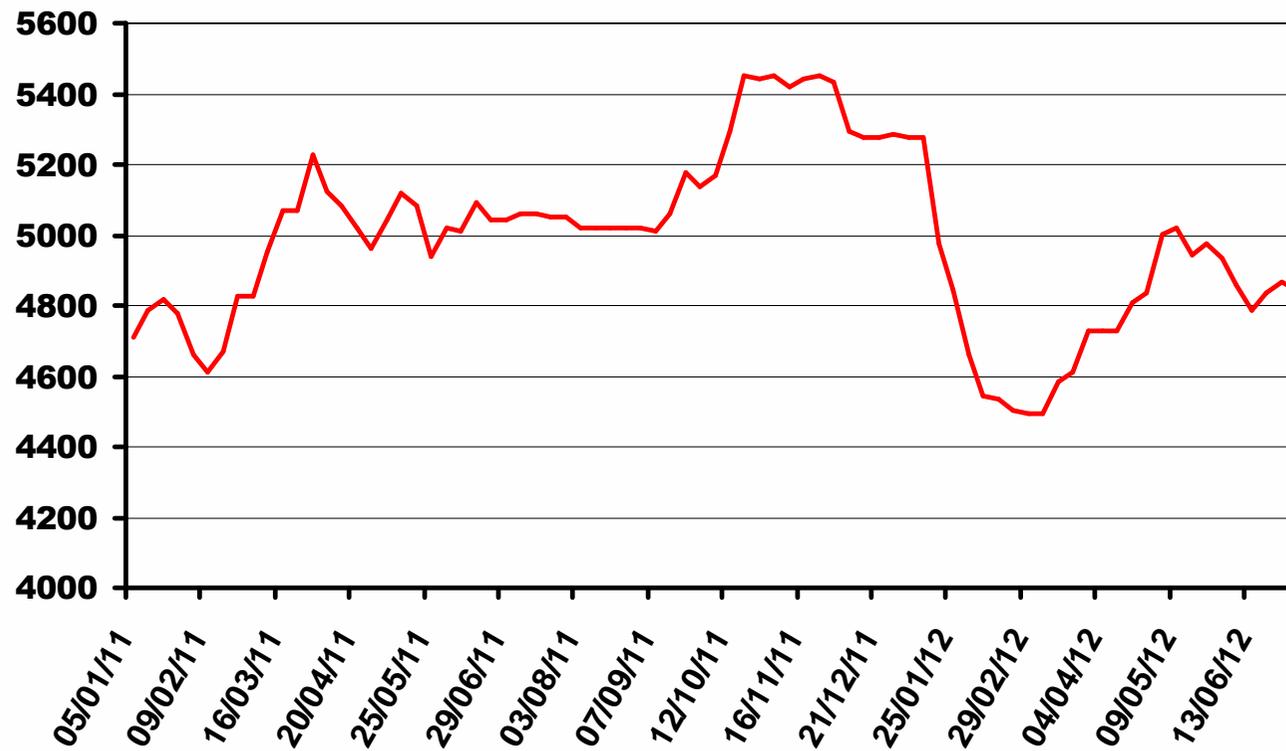


— Euro en \$ — Moyenne

Fret : Baltic Dry Index



Fret : indice des frets céréaliers du CIC



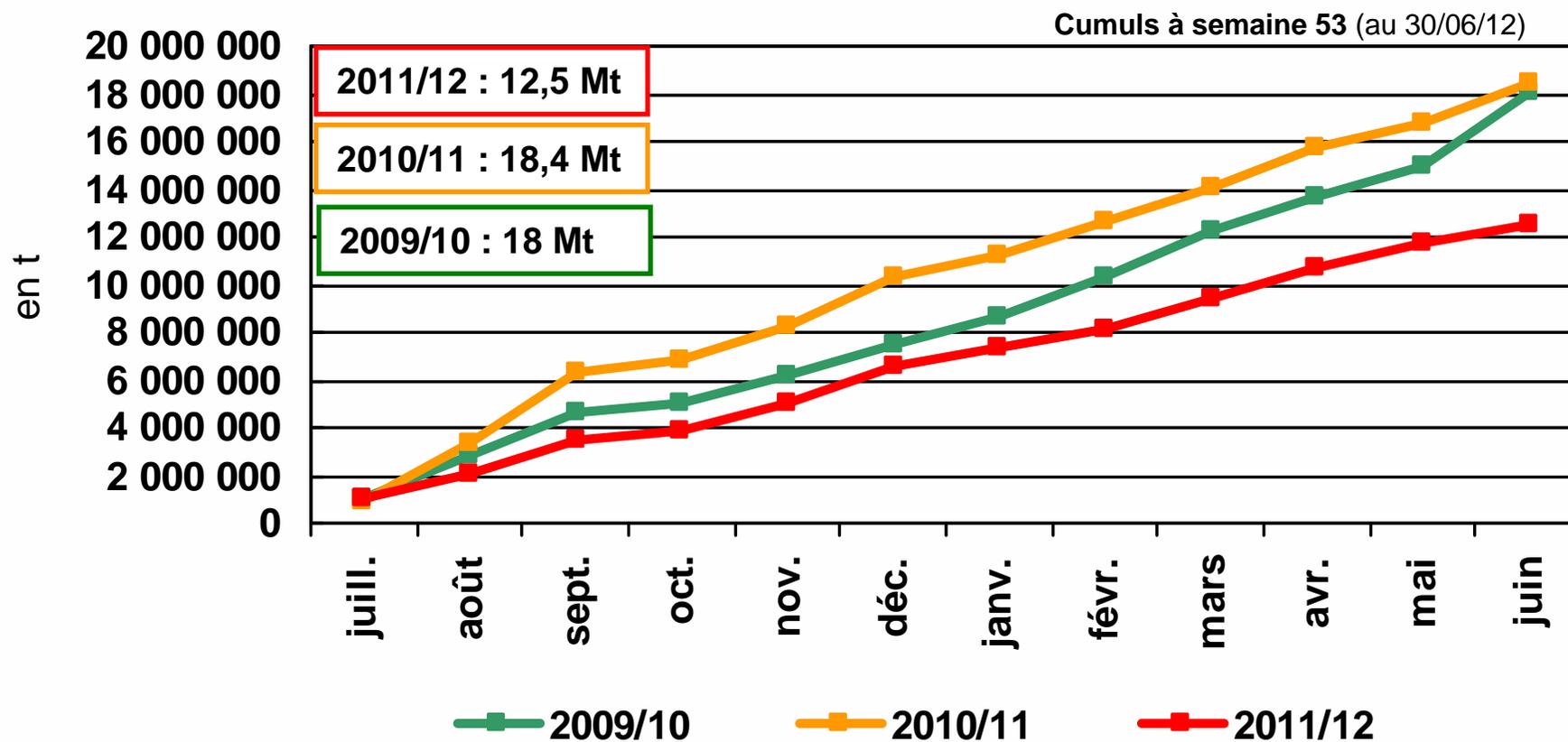


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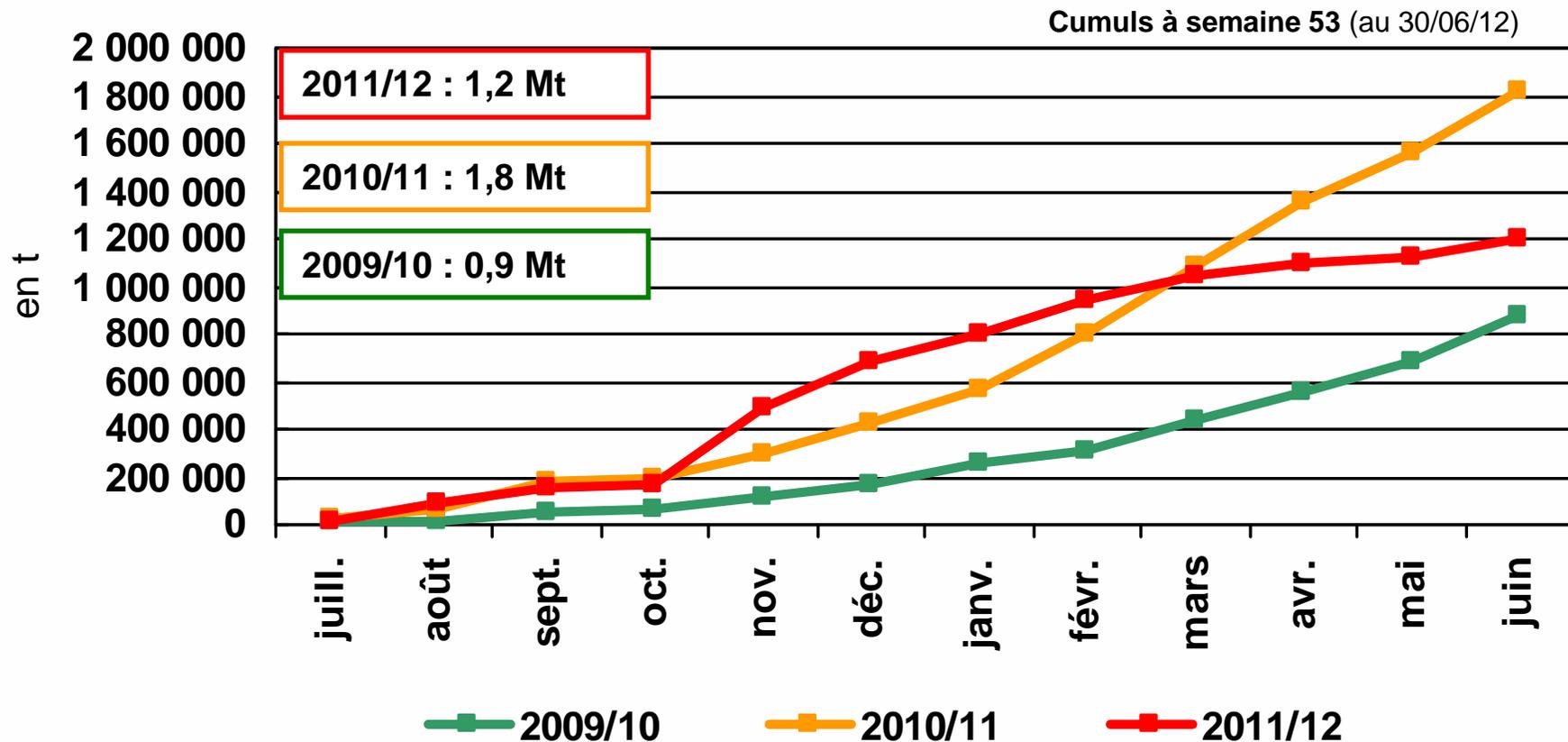
Marché européen

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



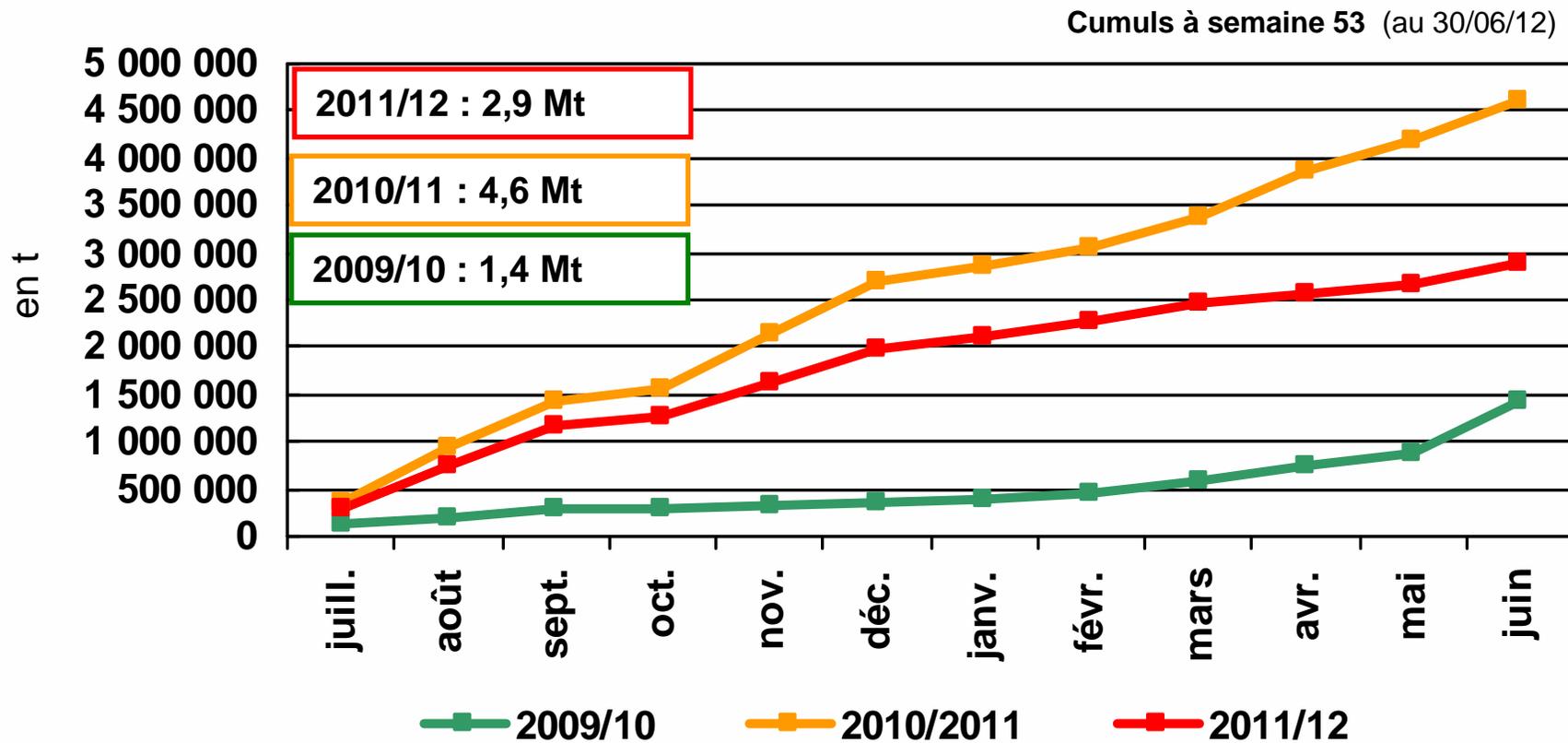
Source : Commission européenne

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



Source : Commission européenne

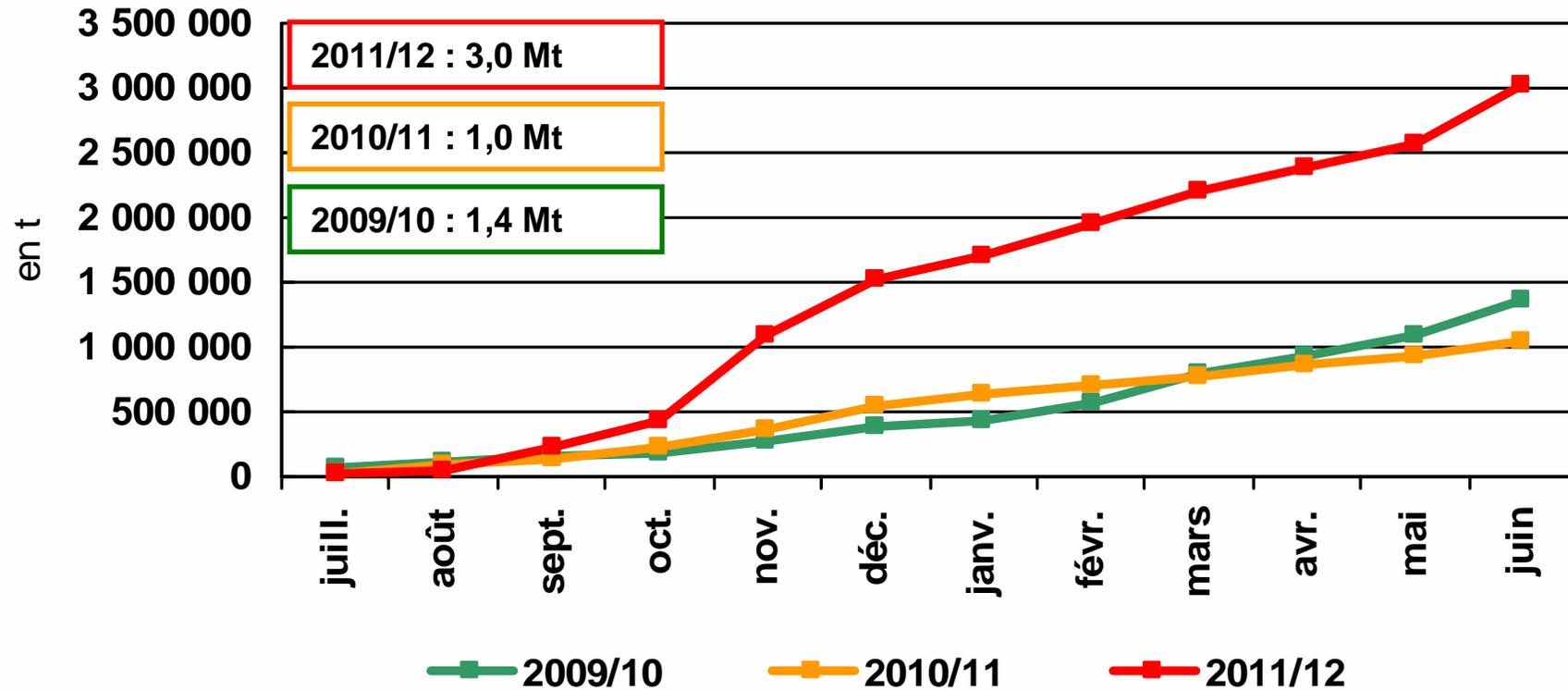
Orge : certificats à l'exportation délivrés dans l'UE



Source : Commission européenne

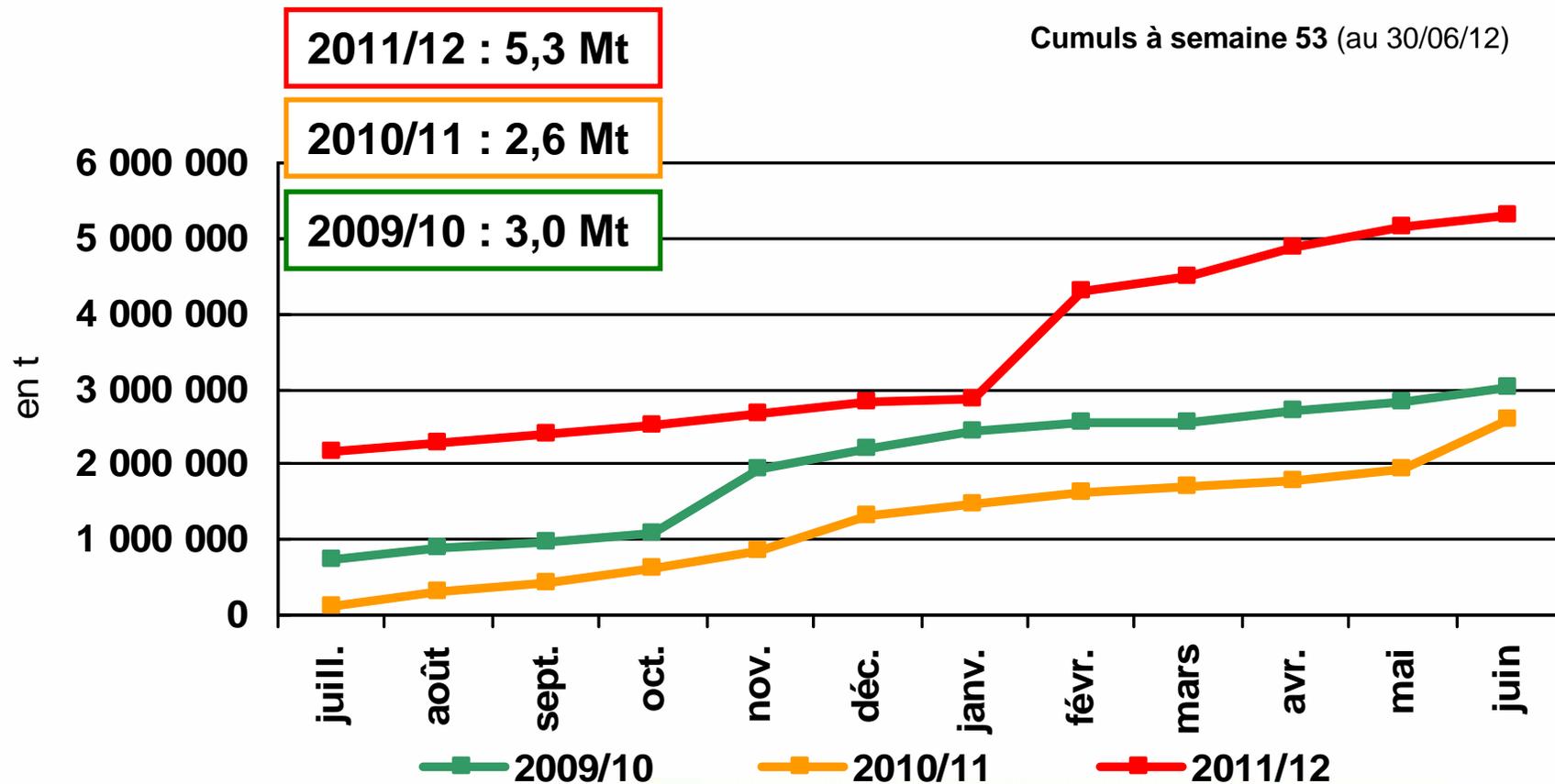
Maïs : certificats à l'exportation délivrés dans l'UE

Cumuls à semaine 53 (au 30/06/12)

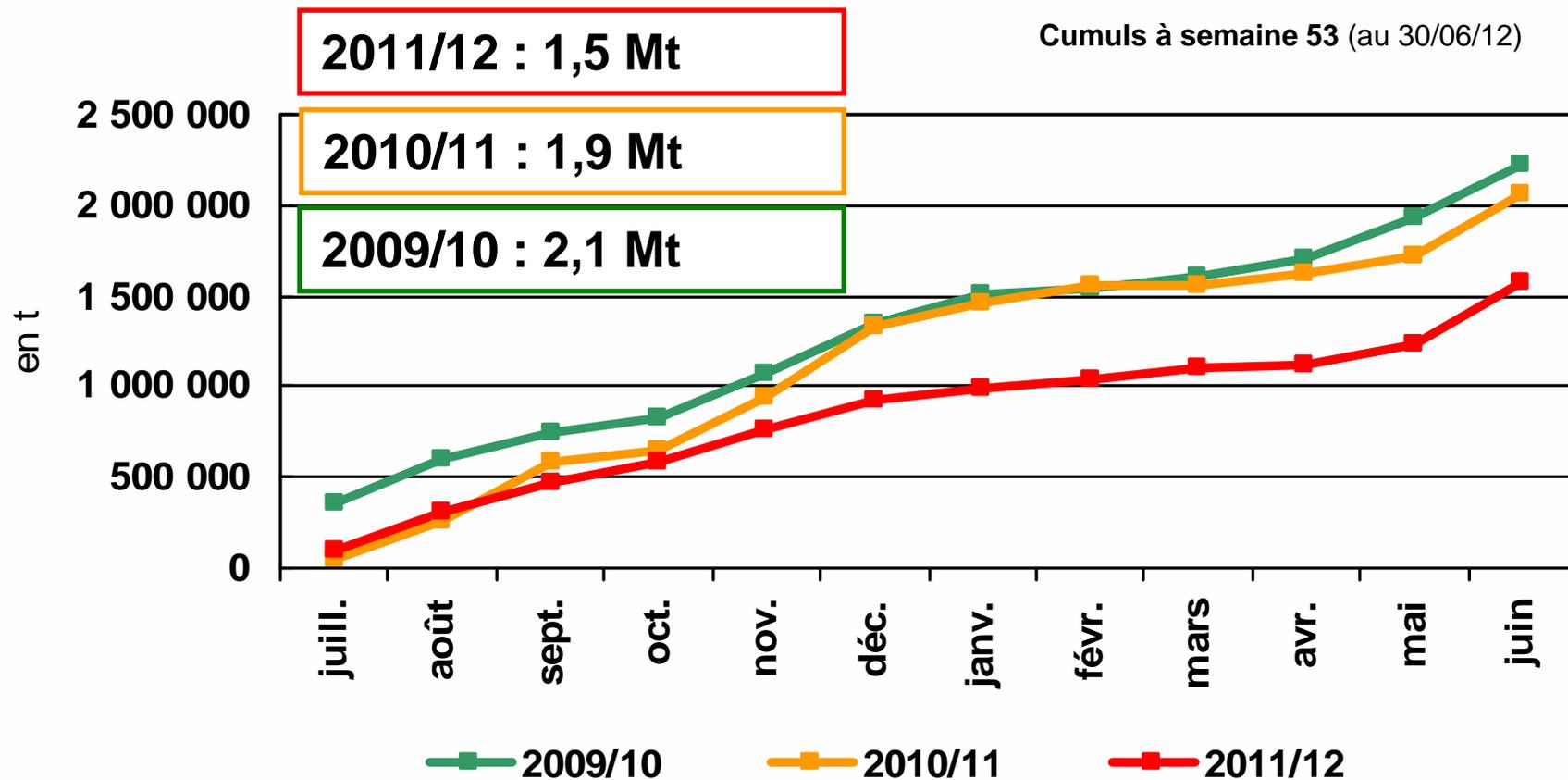


Source : Commission européenne

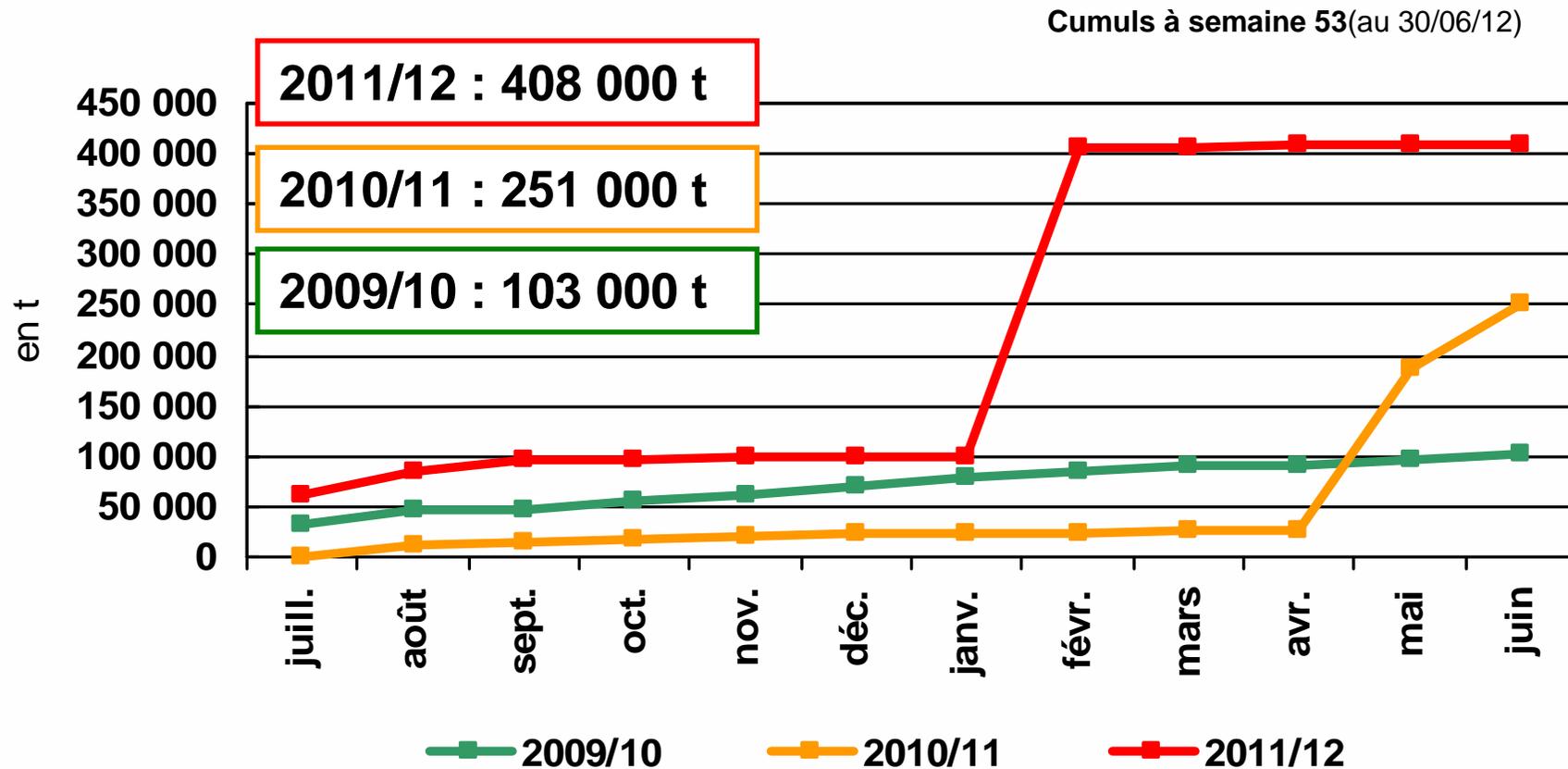
Blé tendre : certificats à l'importation délivrés dans l'UE



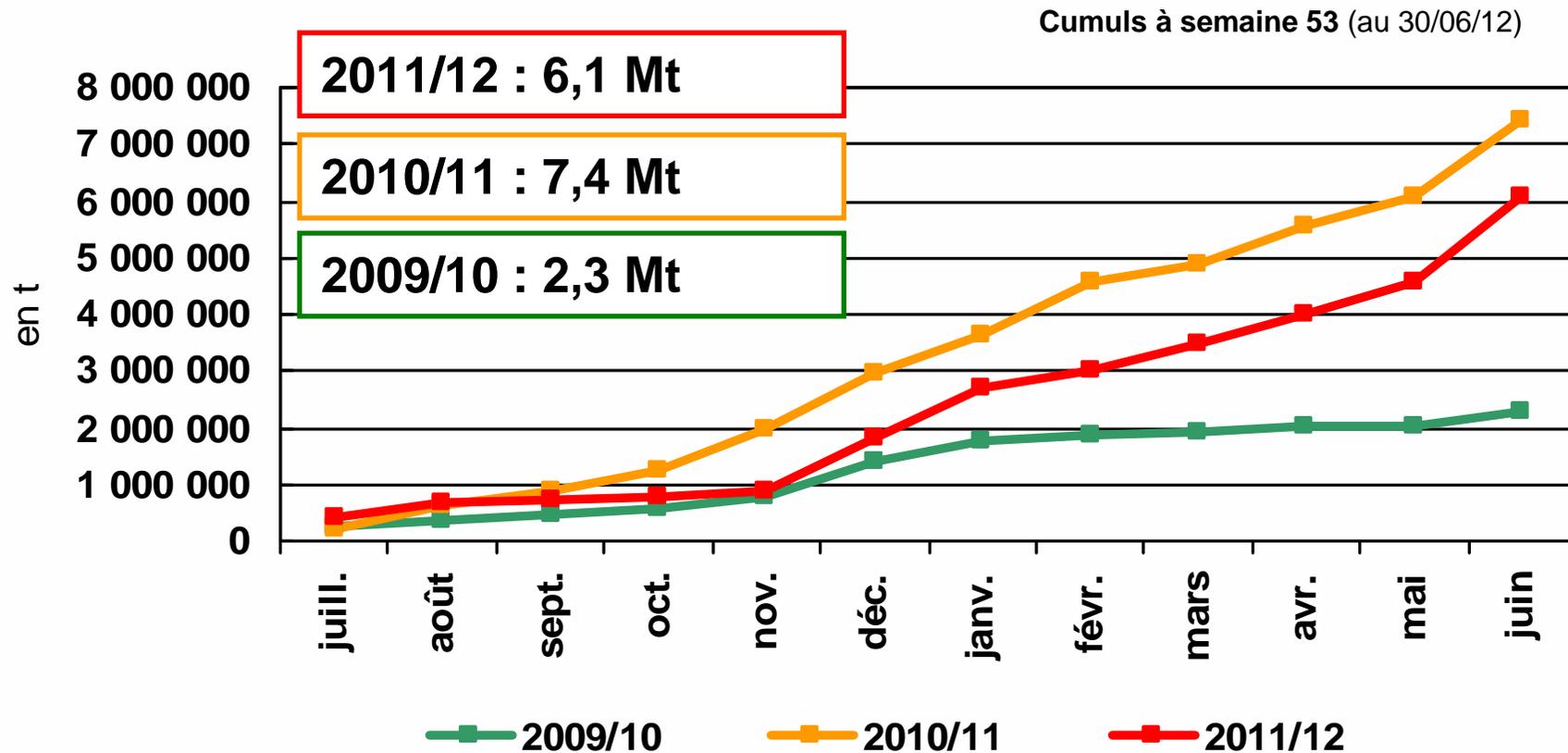
Blé dur : certificats à l'importation délivrés dans l'UE



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

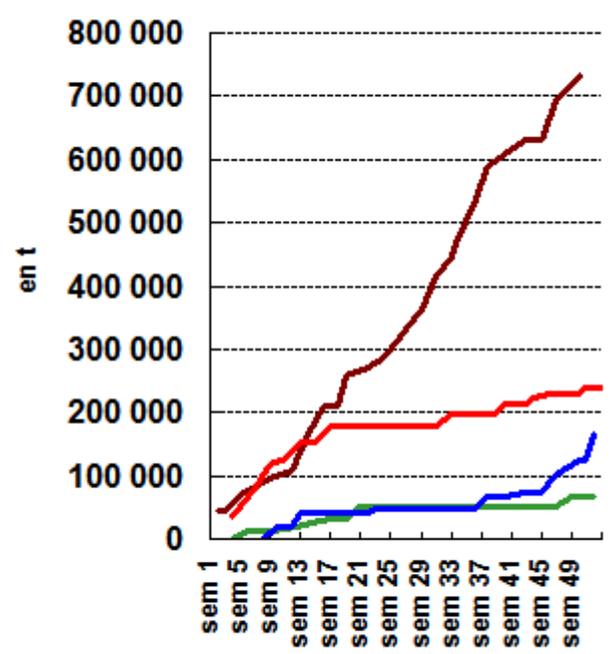


Maïs : certificats à l'importation délivrés dans l'UE

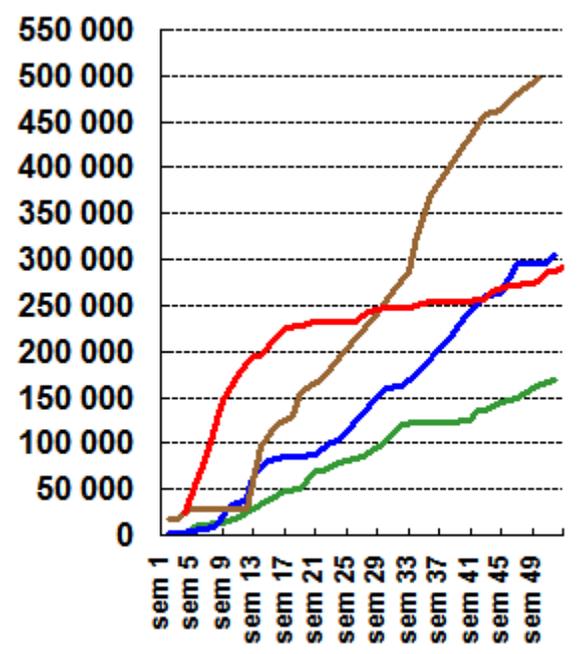


Imports de PSC : Certificats tirés depuis le début de campagne

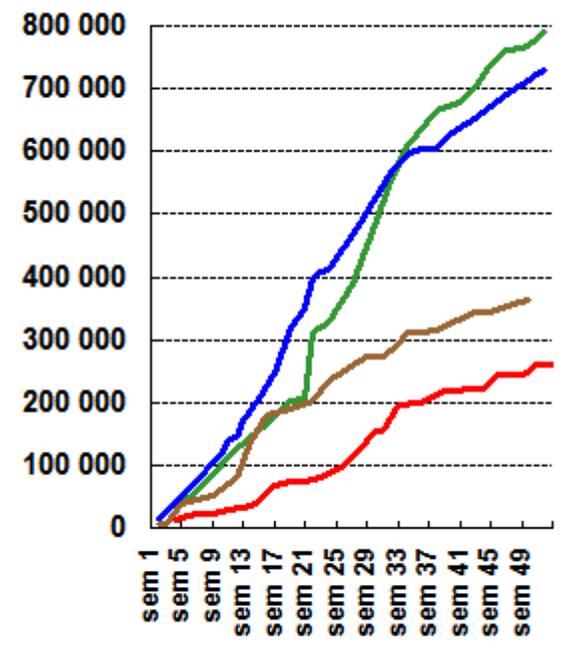
Corn gluten feed



Drèches de brasserie



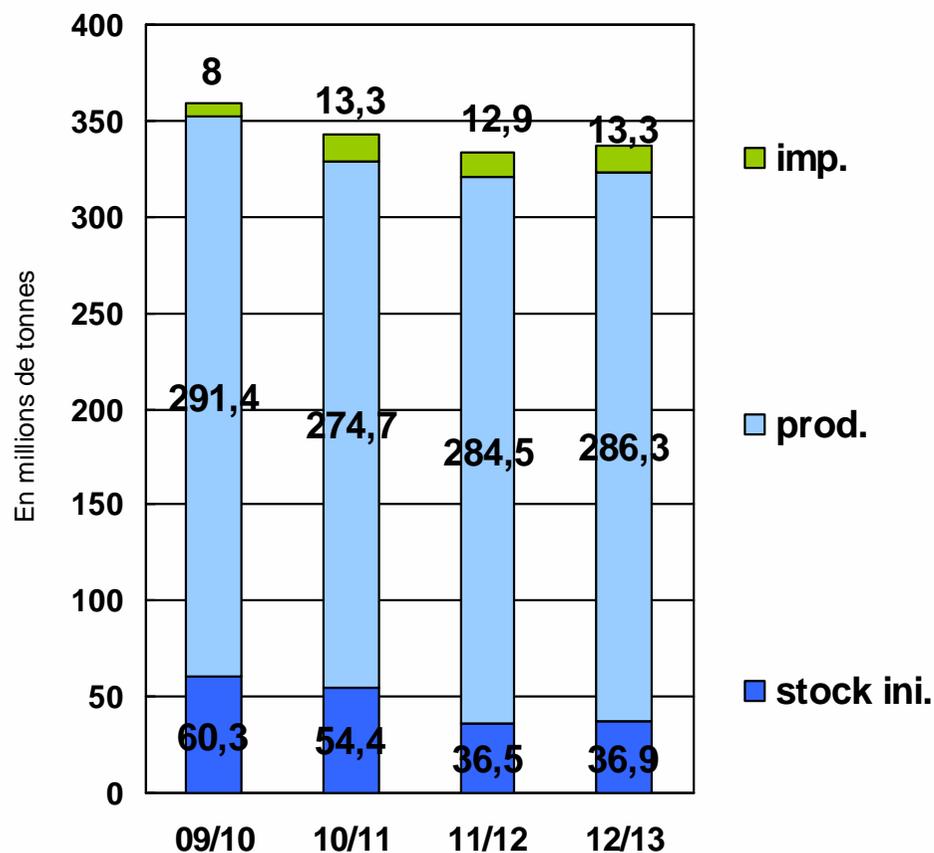
Pulpes d'agrumes



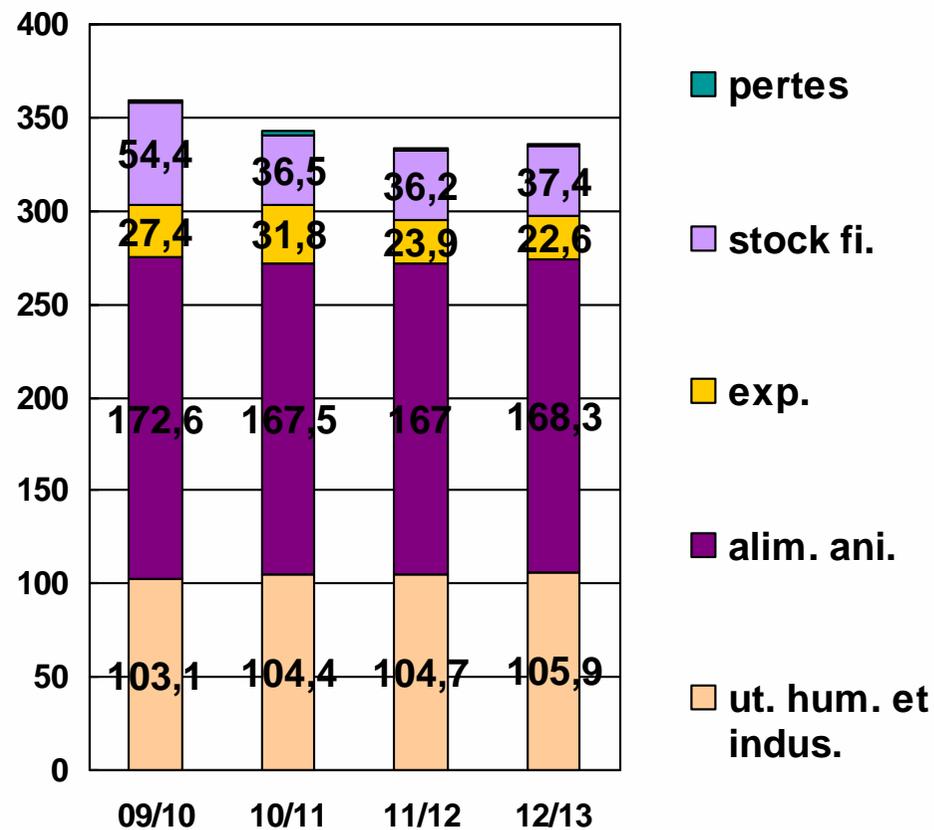
— 2008/09 — 2009/10
— 2010/11 — 2011/12

UE - bilan toutes céréales

Total dispo 2012/13 : 336,5 Mt

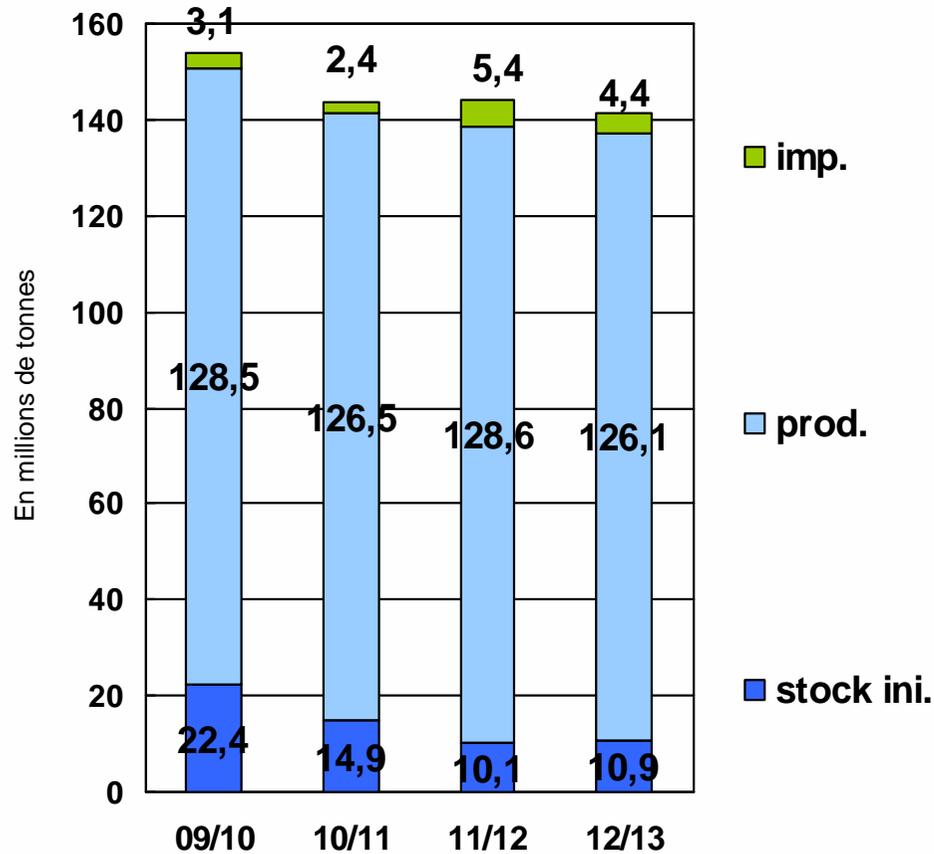


Total utilisation 2012/13 : 336,5 Mt

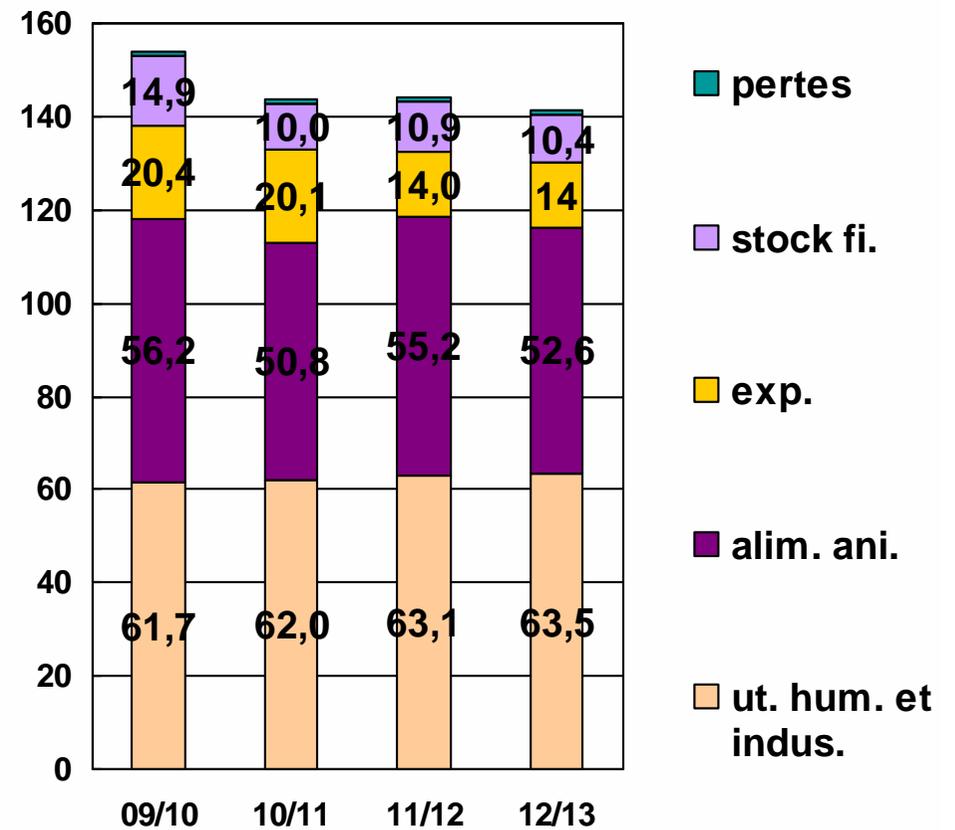


UE - bilan blé tendre

Total dispo 2012/13 : 141,4 Mt

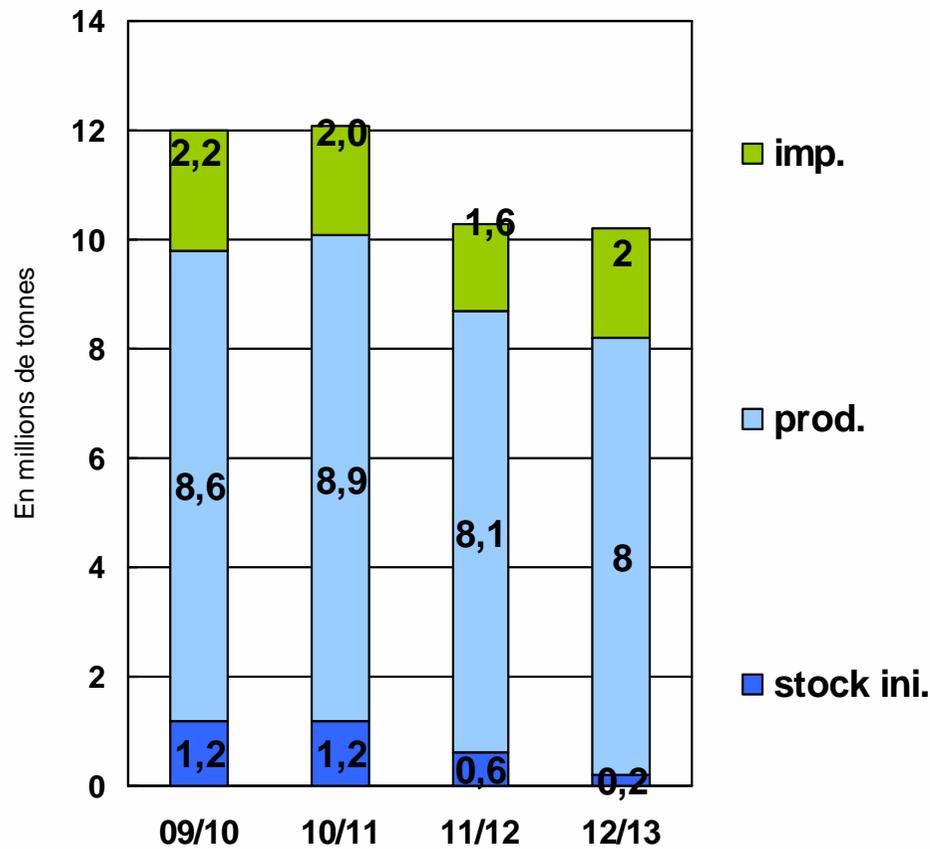


Total utilisation 2012/13 : 141,4 Mt

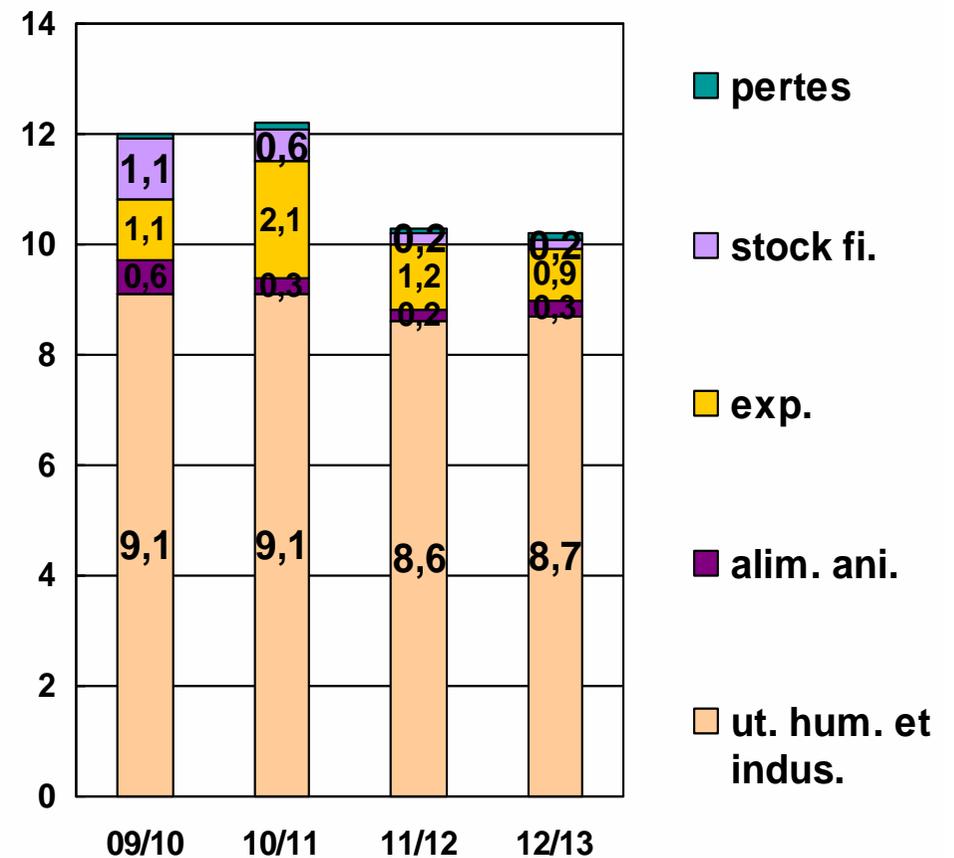


UE - bilan blé dur

Total dispo 2012/13 : 10,2 Mt

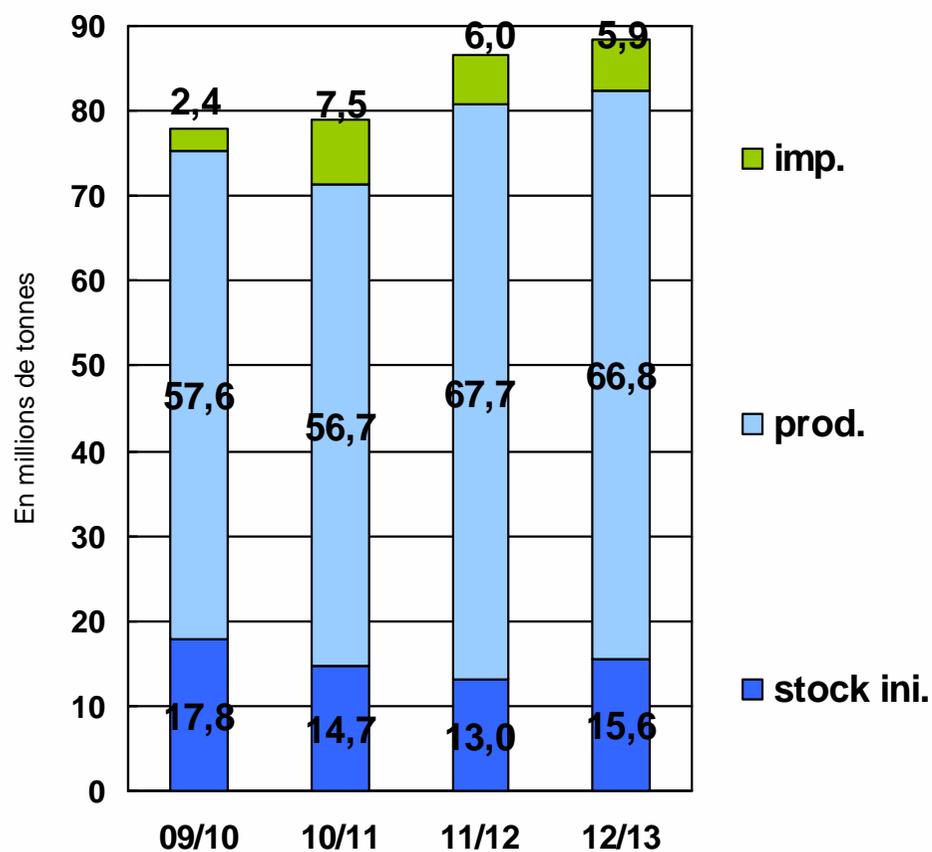


Total utilisation 2012/13 : 10,2 Mt

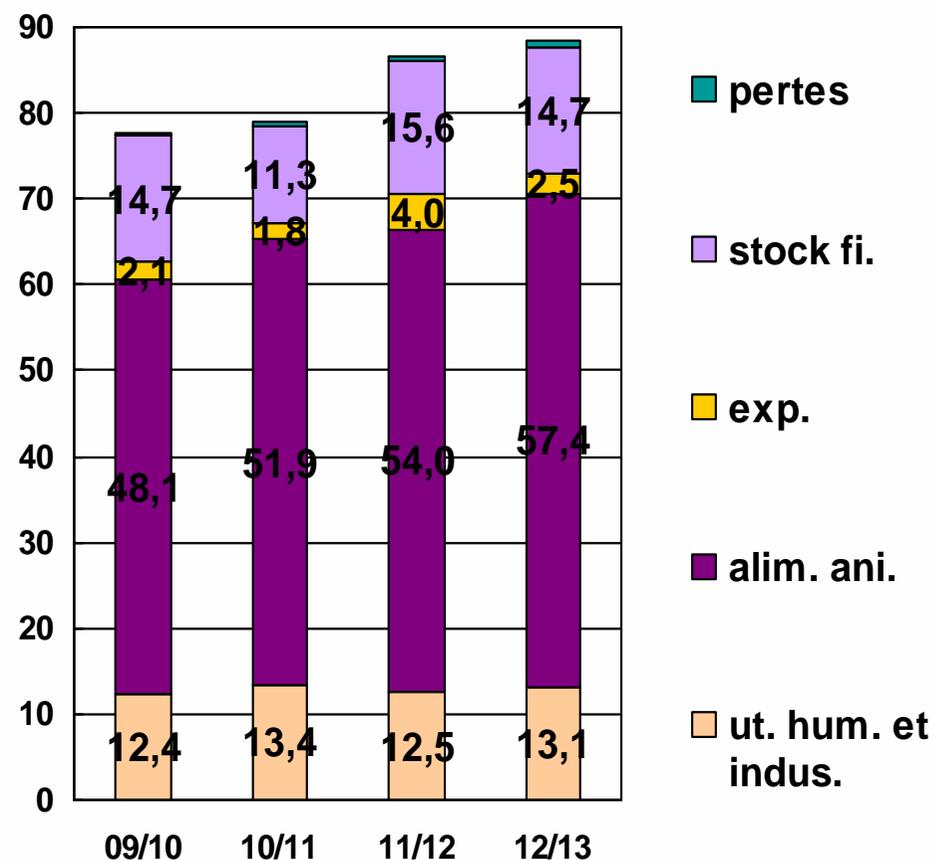


UE - bilan maïs

Total dispo 2012/13 : 88,3 Mt

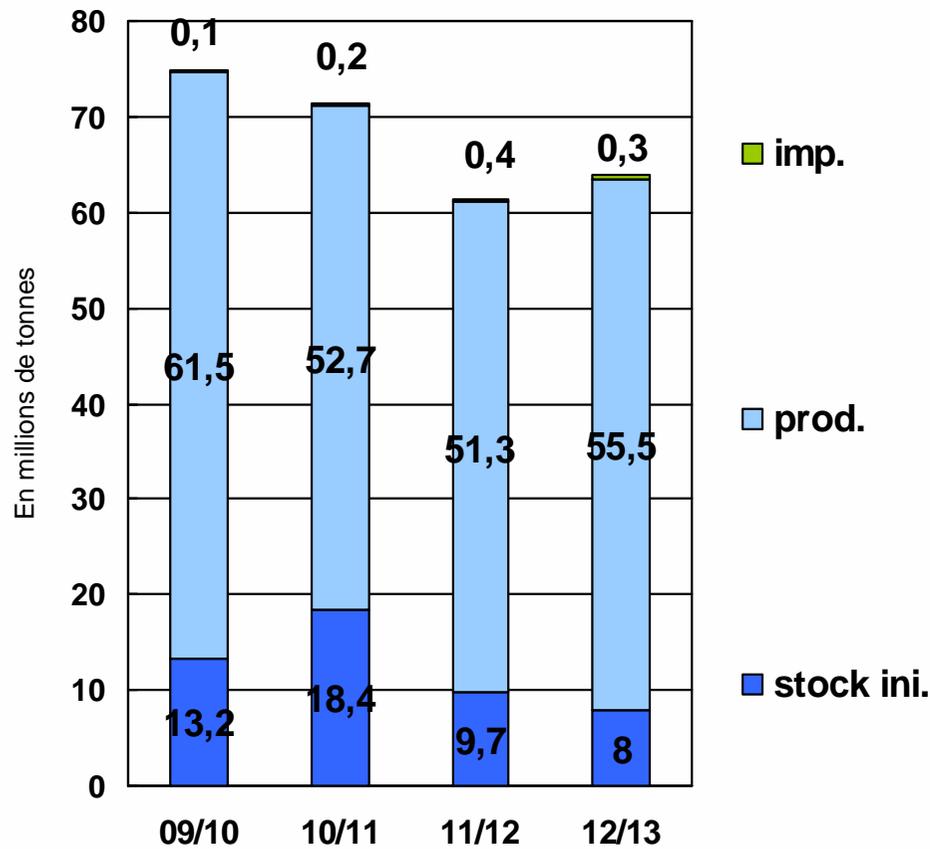


Total utilisation 2012/13 : 88,3 Mt

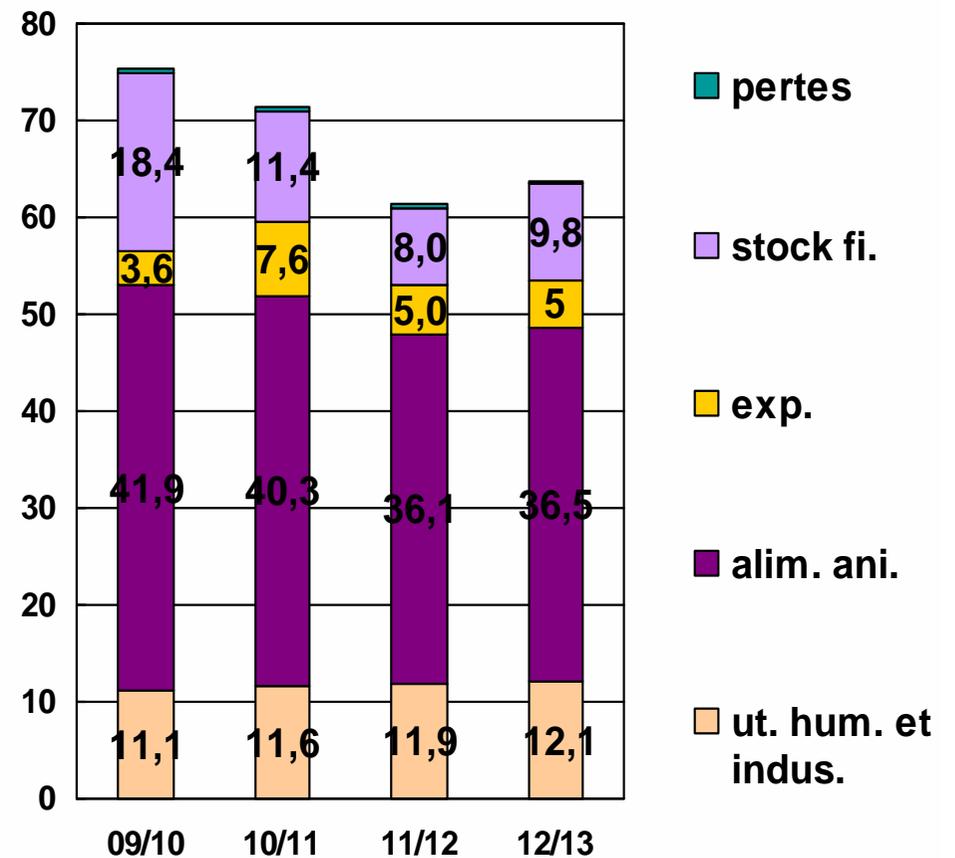


UE - bilan orge

Total dispo 2012/13 : 63,8 Mt



Total utilisation 2012/13 : 63,8 Mt



AGRICULTURAL AREAS RAINFALL

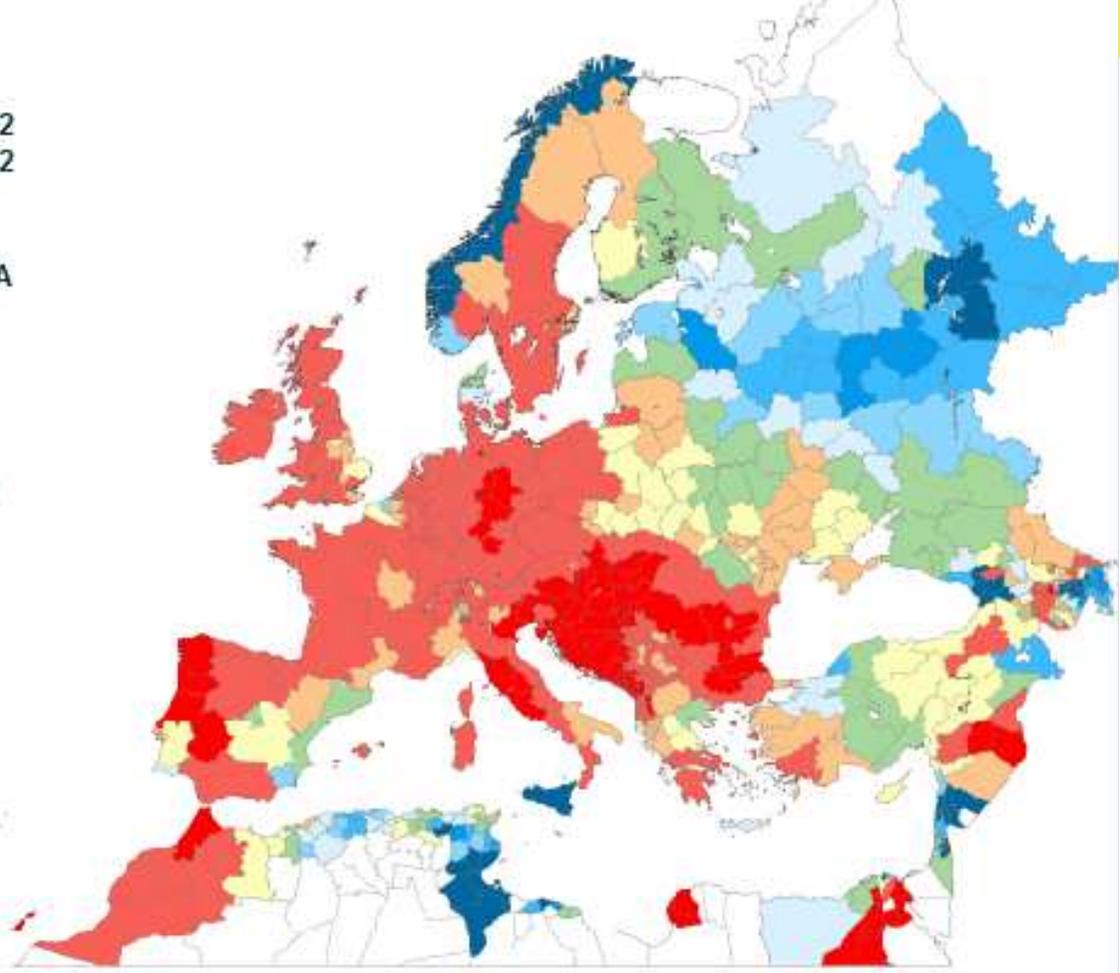
04/04/2012
resolution: NUTS Level 2

Cumulated values

from : 01 March 2012
to : 31 March 2012

Deviation:

Year of interest - LTA



Source: National Meteorological Services
Processed by: ALTERRA Consortium
On behalf of: AGR4CAST Action - MARS Unit



FranceAgriMer

RAINFALL

Cumulated values

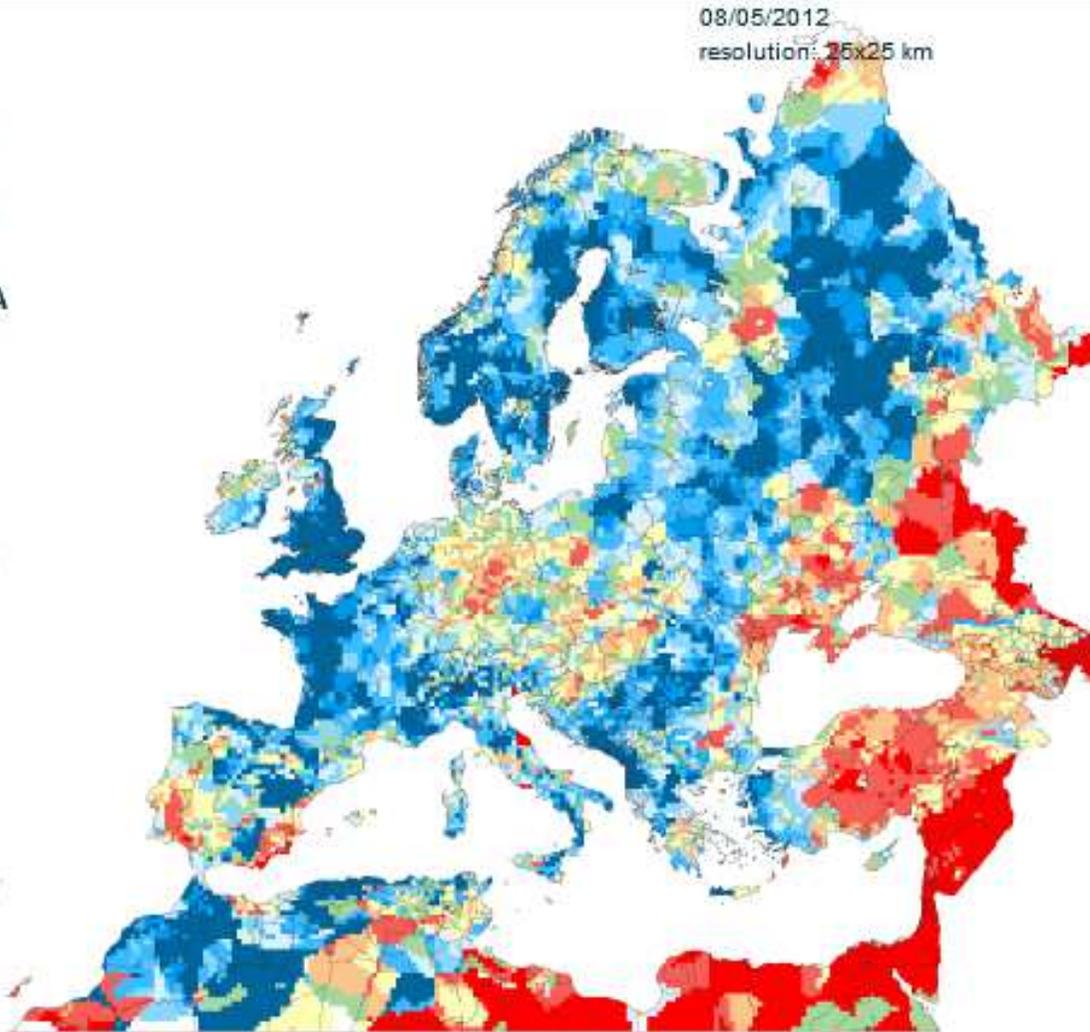
from : 01 April 2012
to : 30 April 2012

Deviation:

Year of interest - LTA

08/05/2012
resolution: 25x25 km

Unit: %



Source: National Meteorological Services
Processed by: ALTERRA Consortium
On behalf of: AGR4CAST Action - MARS Unit



FranceAgriMer

RAINFALL

Cumulated values

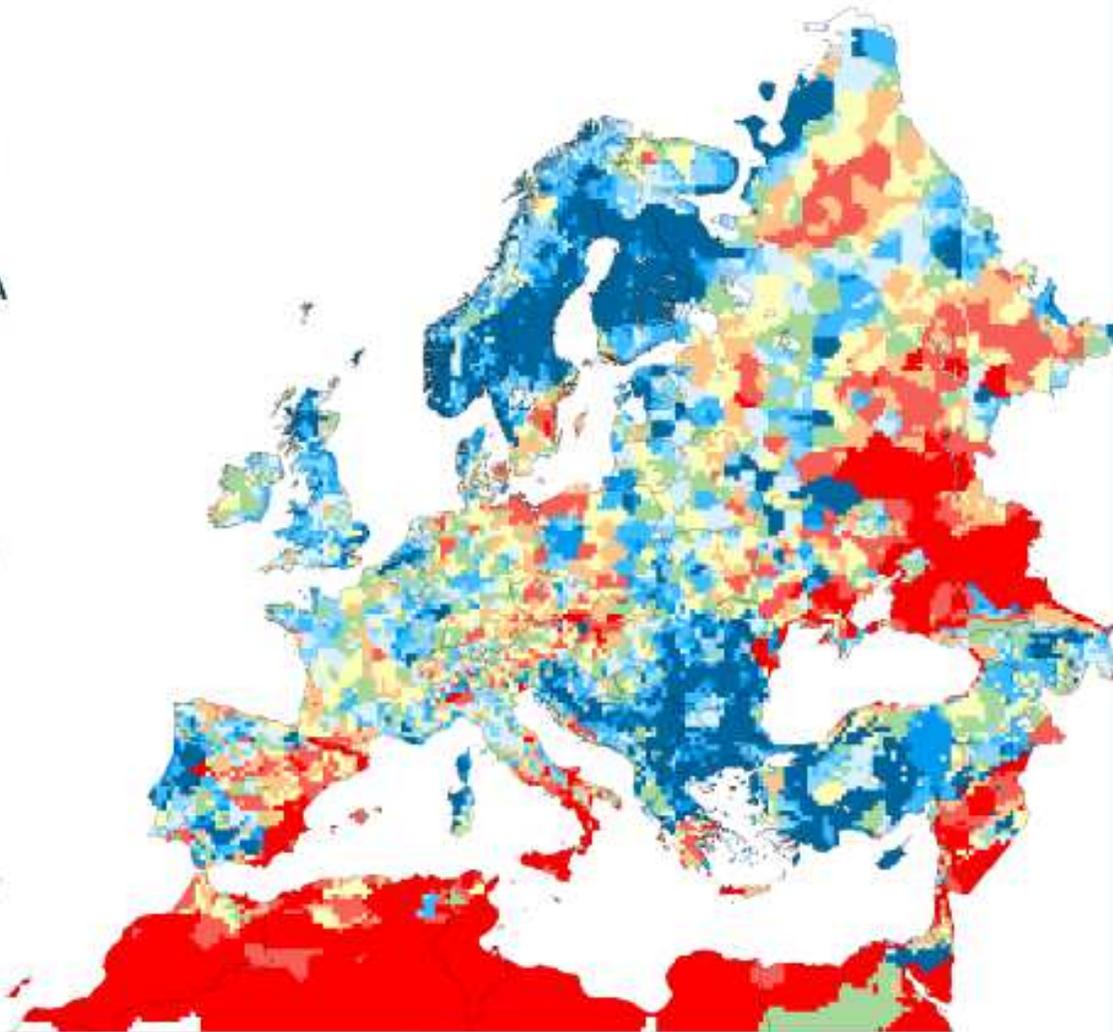
from : 01 May 2012

to : 20 May 2012

Deviation:

Year of interest - LTA

Unit: %



24/05/2012

resolution: 25x25 km



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



RAINFALL

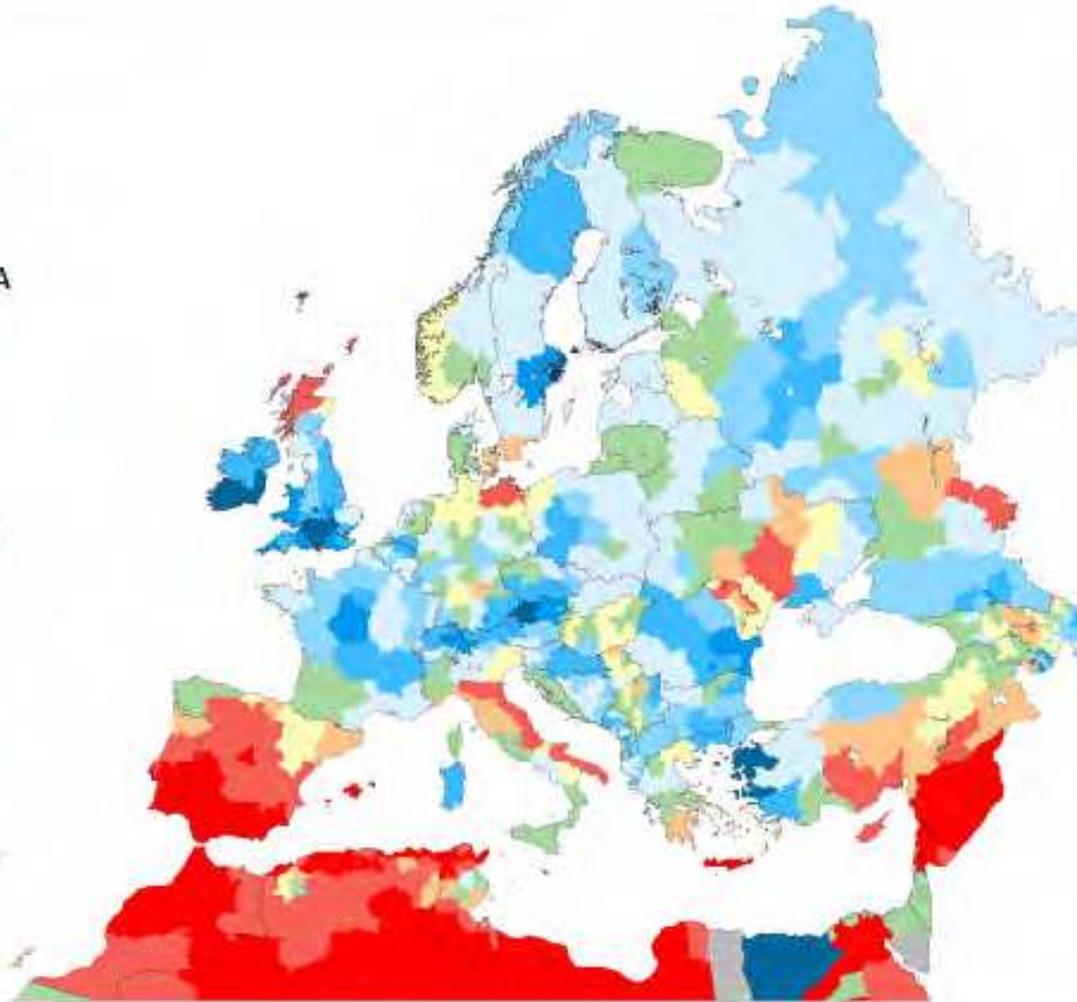
Cumulated values

from : 21 May 2012
to : 20 June 2012

Deviation:

Year of interest - LTA

Unit: %

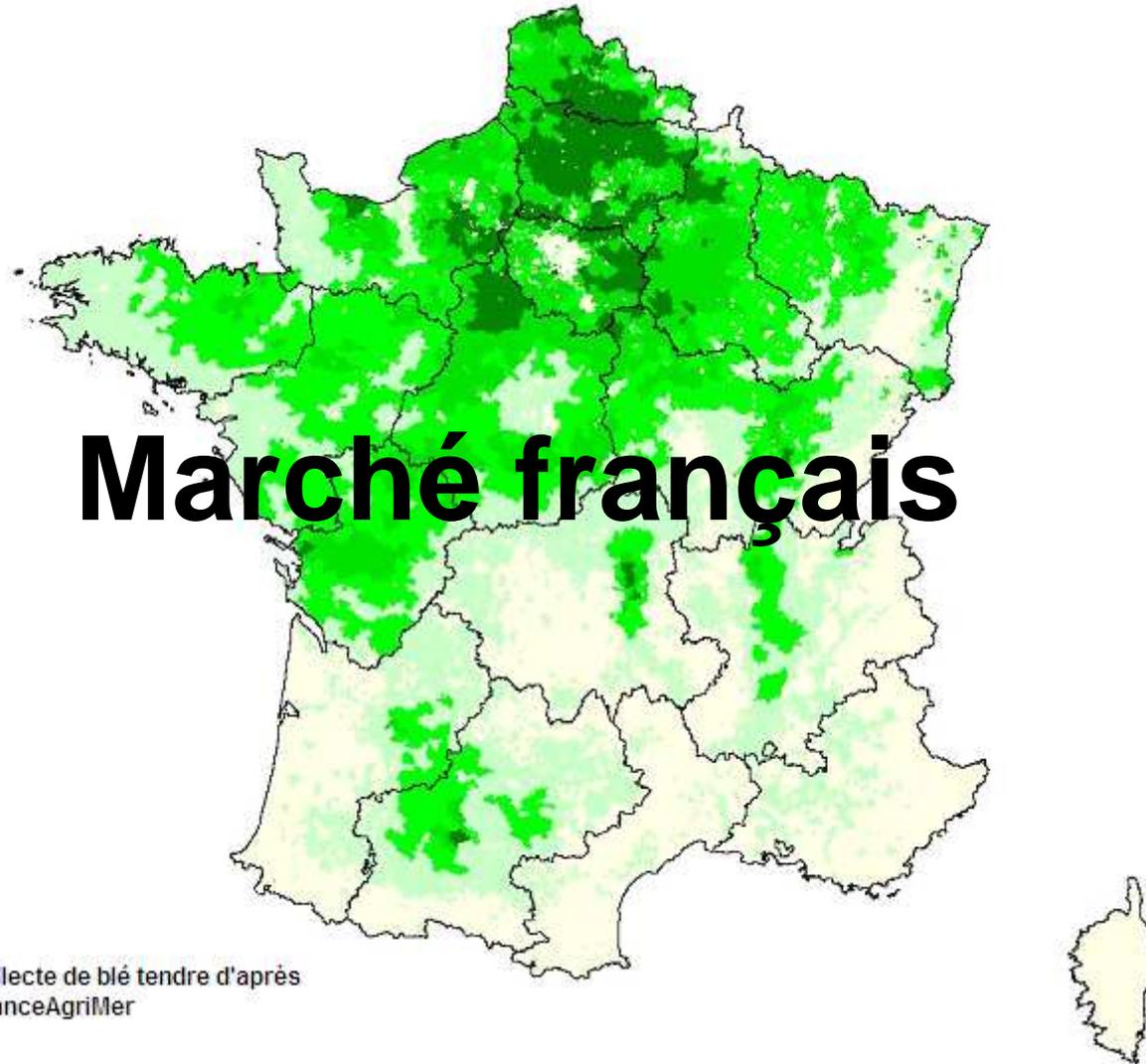


22/06/2012

resolution: NUTS Level 2



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

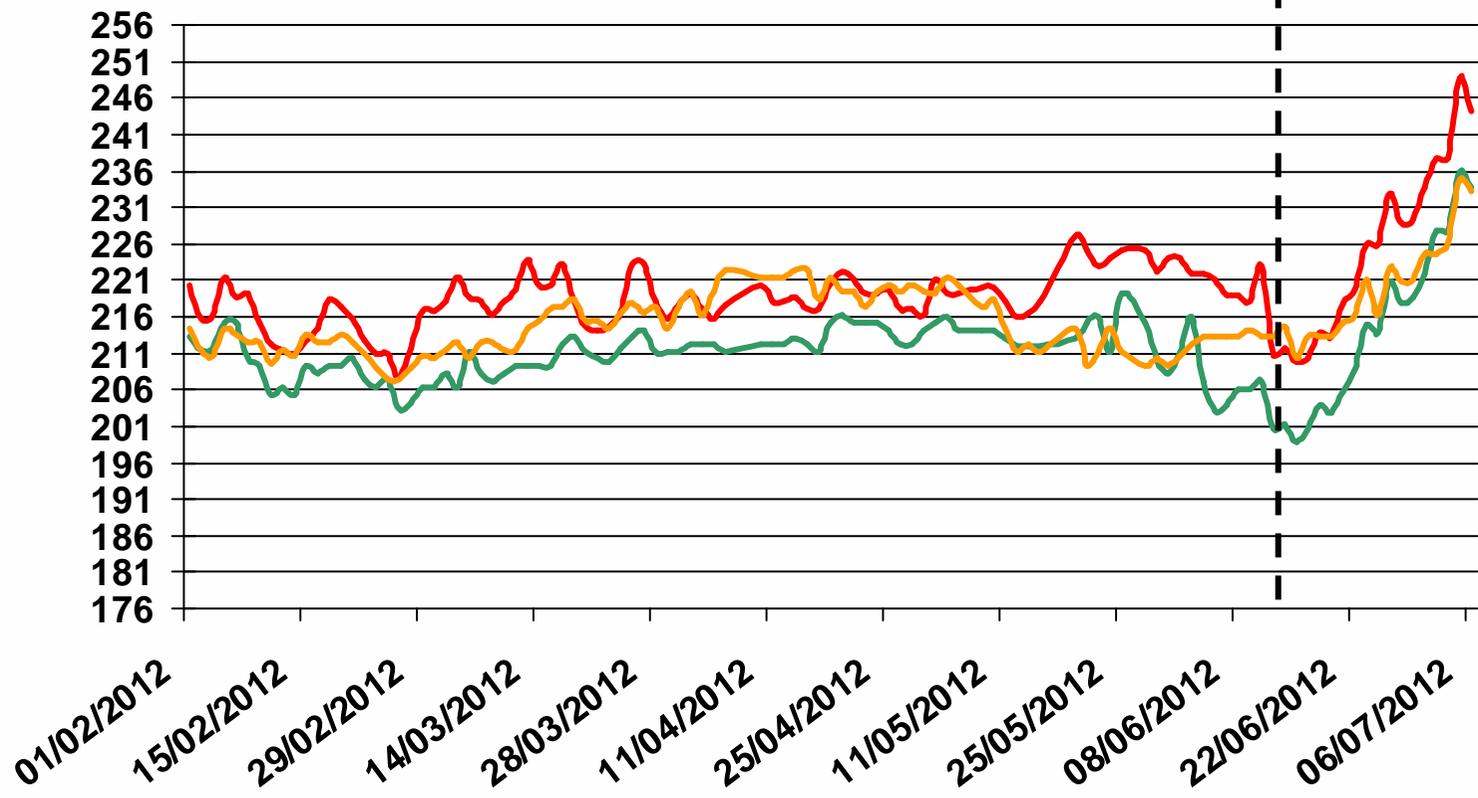


Marché français

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

Céréales françaises : cotations à l'exportation

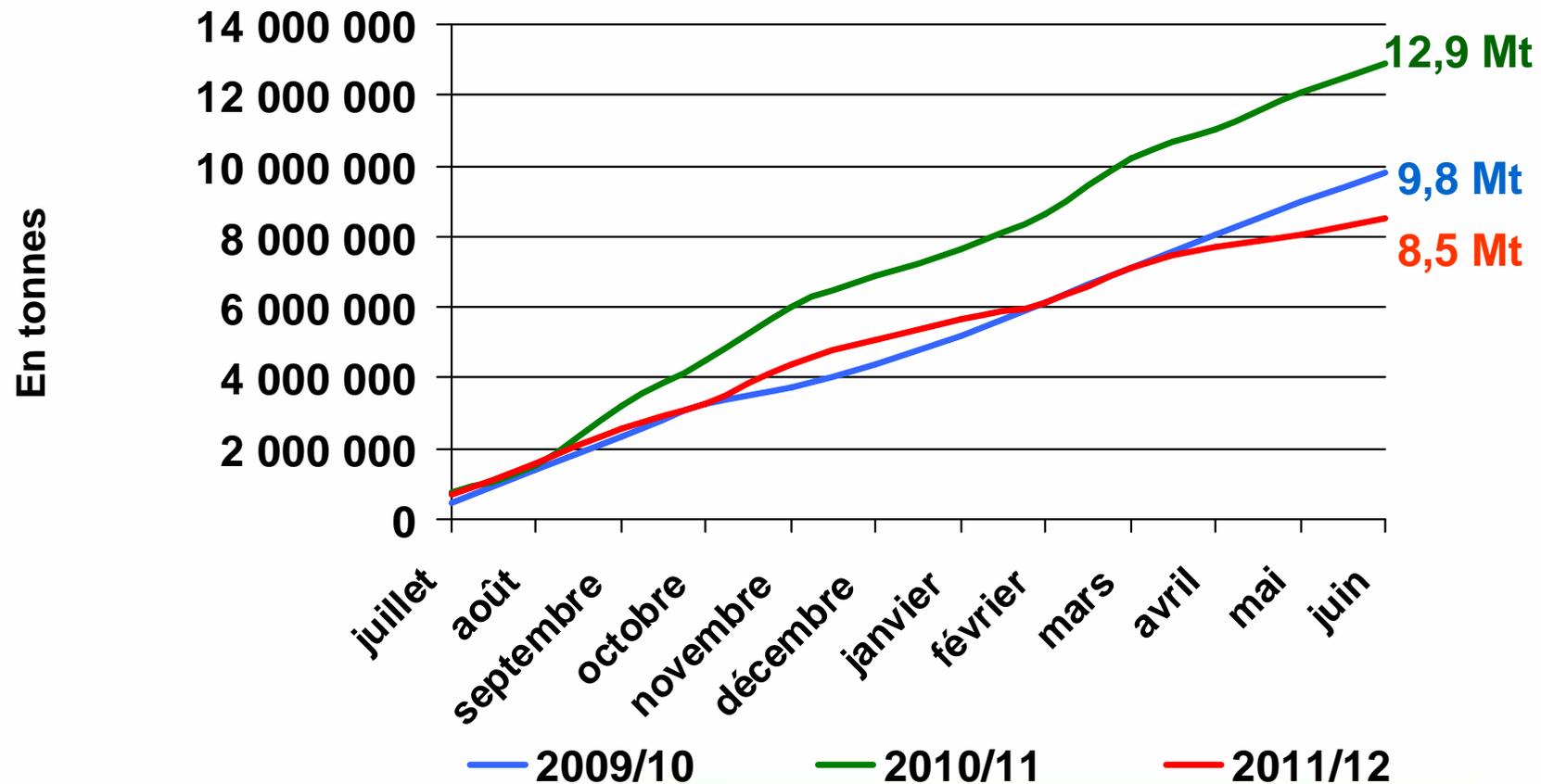
En €/t (majorations mensuelles incluses)



Récolte 2012 (blé tendre et orge)

— Blé FCW 1 — Orge Fob Rouen — Maïs Fob Bordeaux

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



Exportations de blé tendre sur pays tiers 2011/12 (*en 1 000 t*)

France (30/6/2012)

- Algérie : 3 447 (4 200)
- Maroc : 1 535 (2 112)
- Egypte : 440 (2 317)
- Tunisie : 30 (368)
- Libye : 145 (248)
- Yemen : 99 (499)
- Cuba : 561 (523)
- Afrique sub-s. : 1 980 (1900)
- Maurice : 77 (79)

- Total Pays tiers : 8,5 Mt (12,9 Mt)

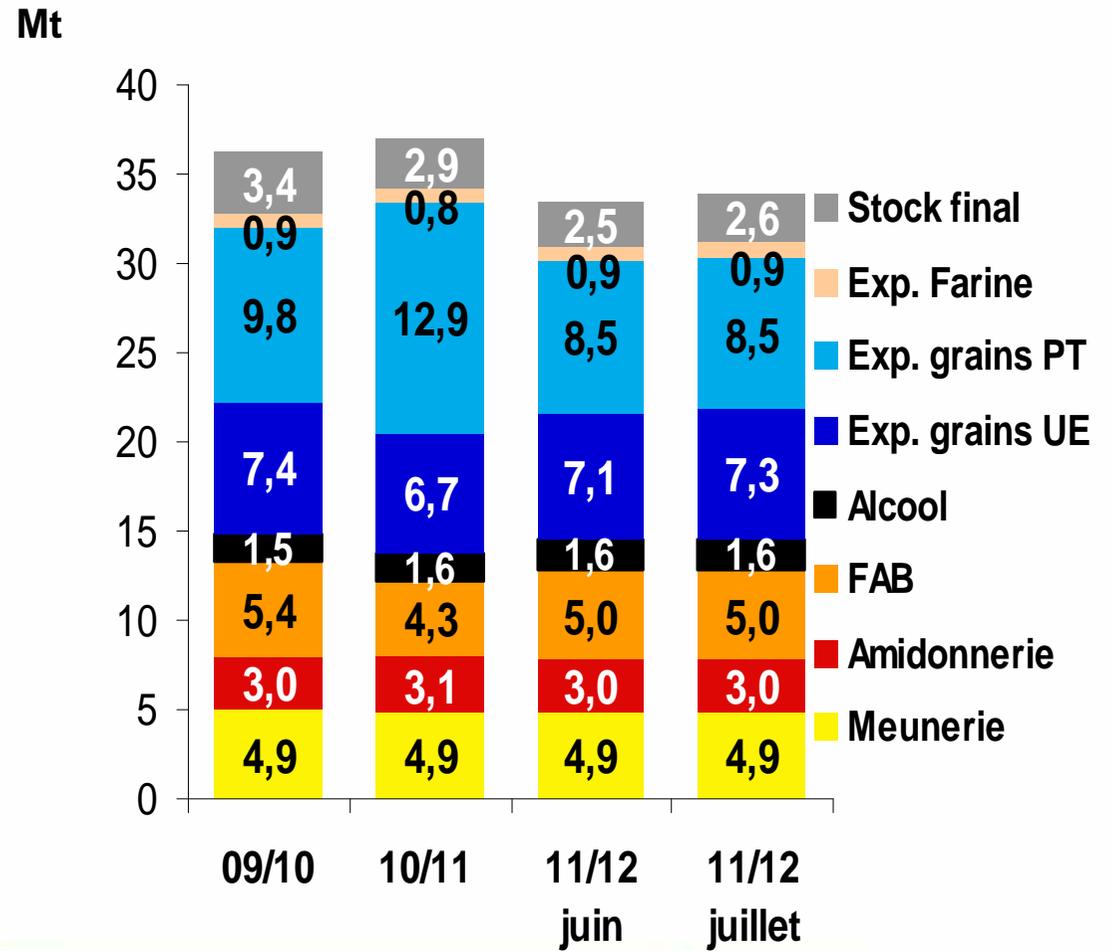
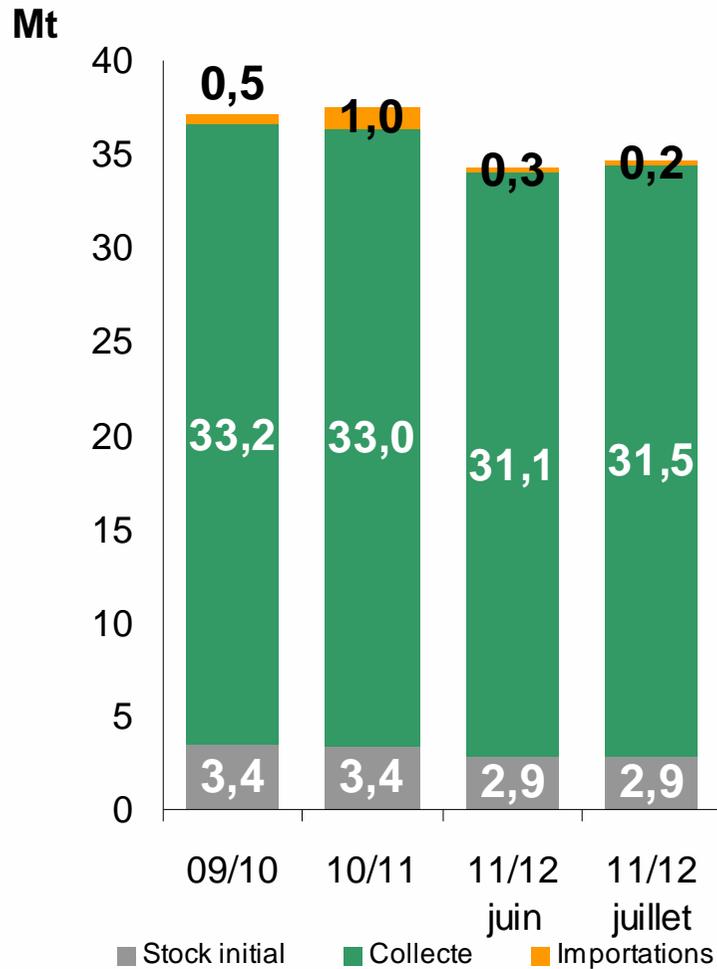
Allemagne (31/4/2012)

- Soudan : 346 (421)
- Ar.Saoud : 310 (314)
- Iran : 373 (0)
- Afr. Sud : 160 (172)
- Norvège : 202 (153)
- Suisse : 87 (166)
- Libye : 74 (256)
- Israel : 72 (28)
- Algérie : 26 (0)

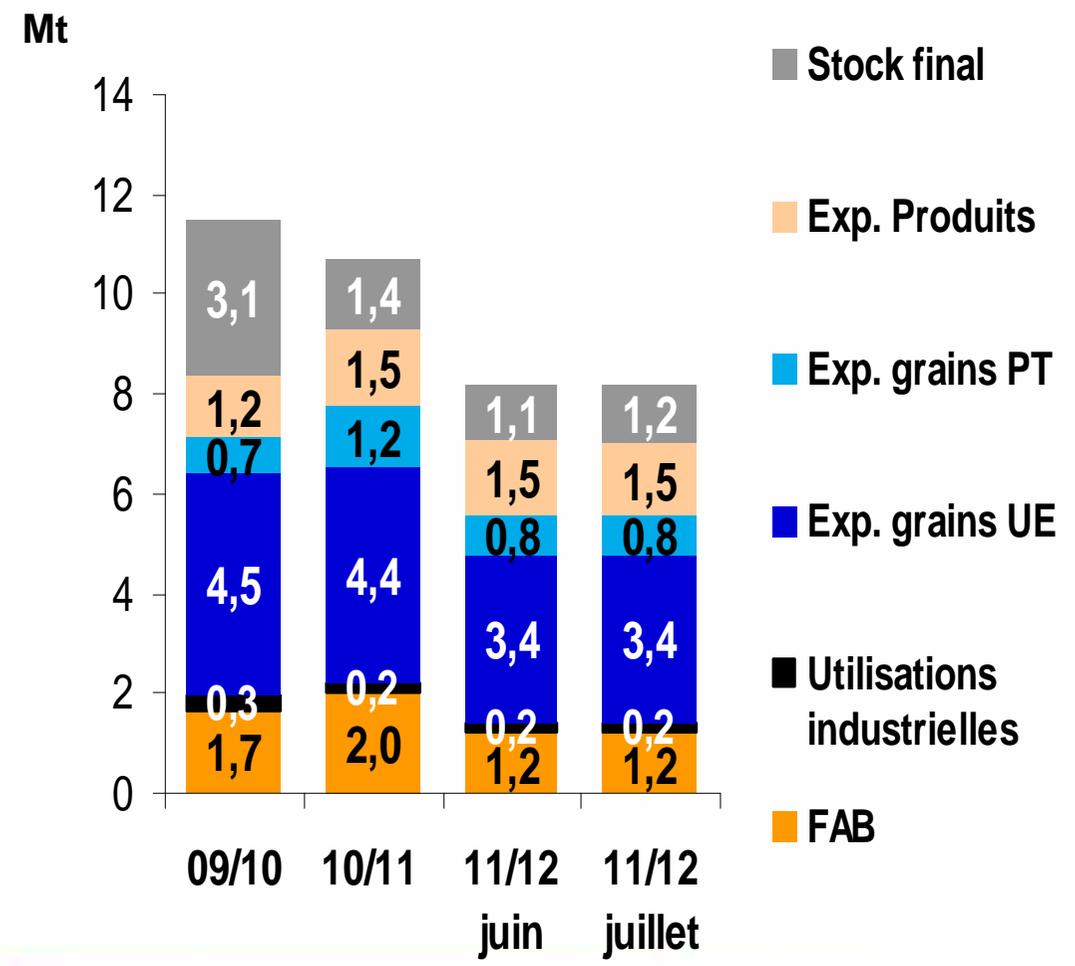
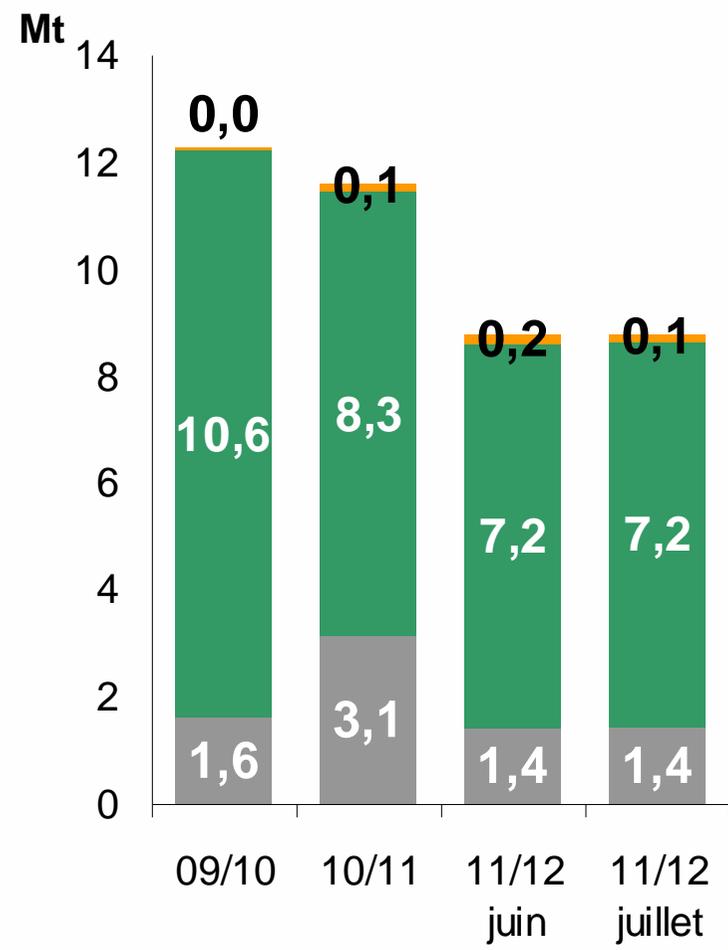
- TOTAL Pays tiers : 1,85 Mt (2,78 Mt)
- Total UE : 2,48 Mt (4,02 Mt)



Bilan blé tendre

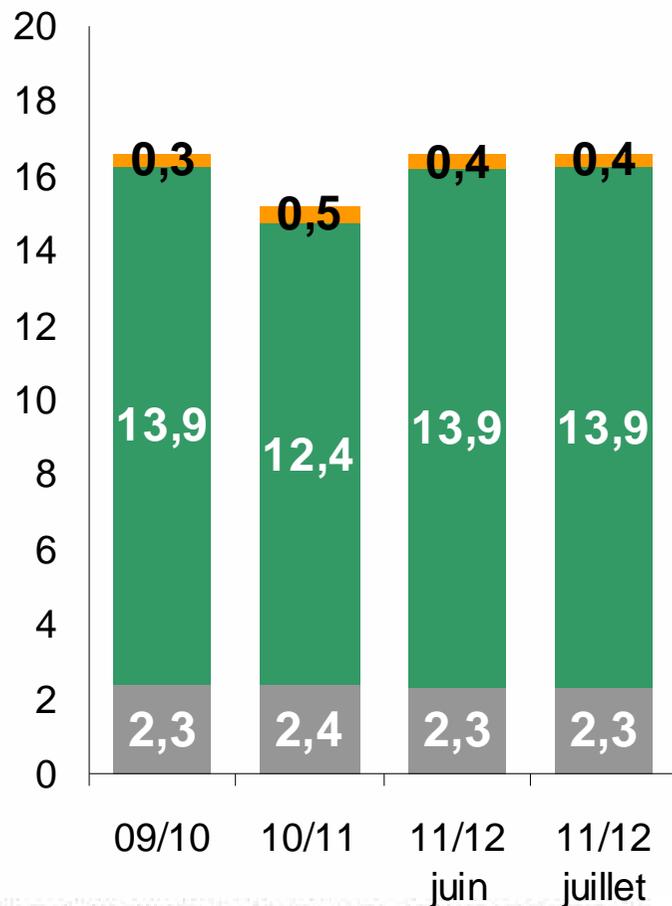


Bilan orge



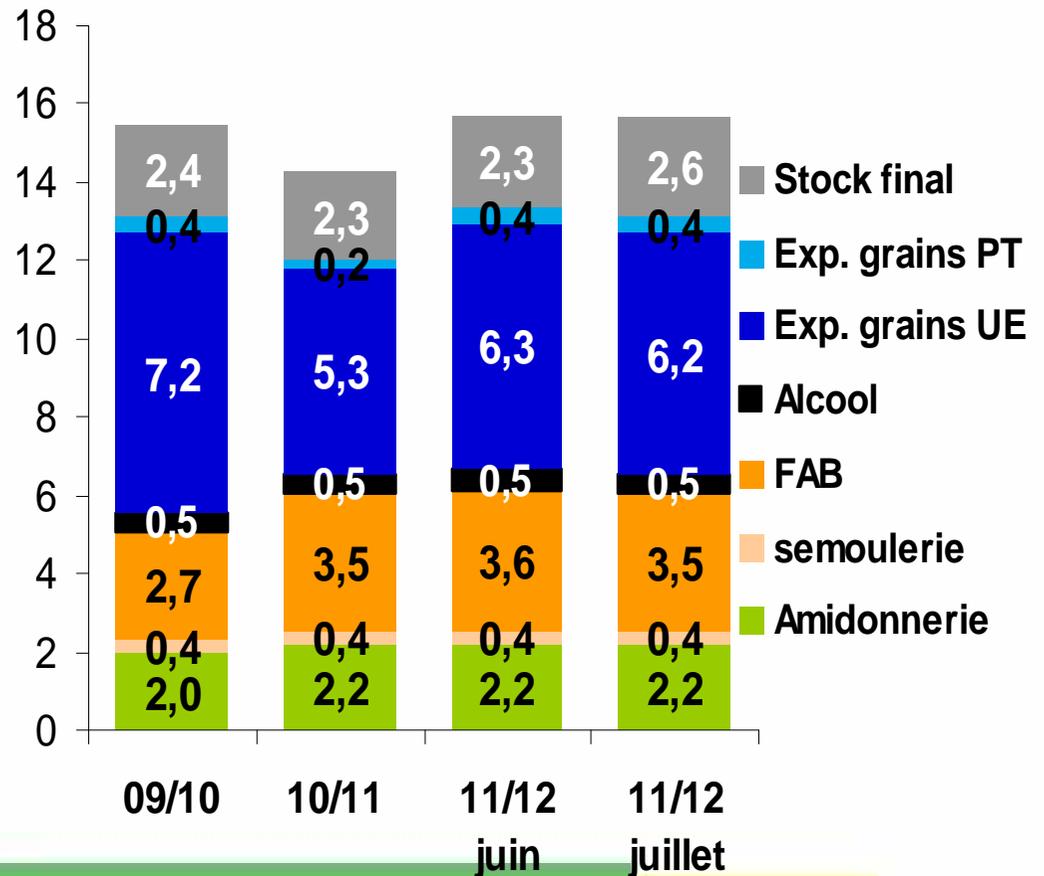
Bilan maïs

Mt



ÉTABLI À PARTIR DES DONNÉES DE L'INVENTAIRE DES PRODUITS AGRICOLES

Mt



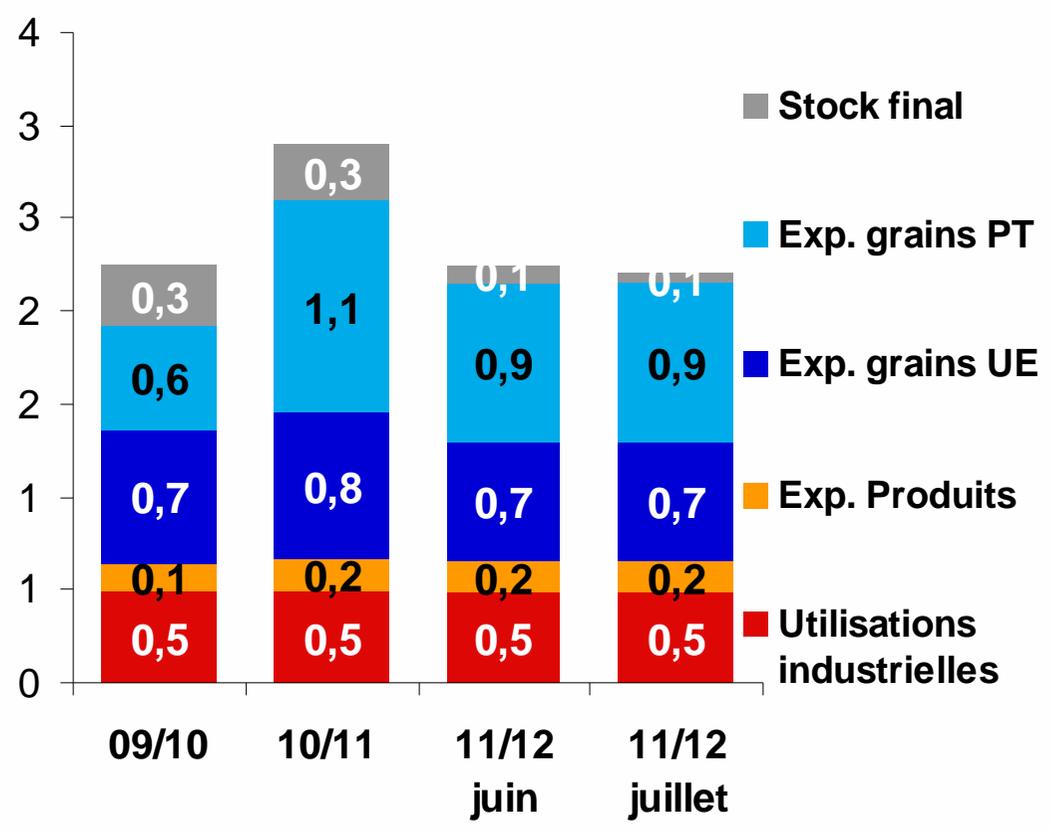


Bilan blé dur

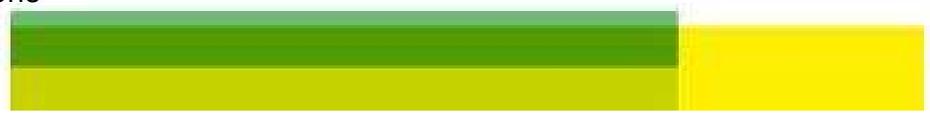
Mt



Mt



■ Stock initial ■ Collecte ■ Importations



Prévision de production 2012 : blé tendre

REGIONS	PRODUCTION		
	2012/2013 SURFACES (Has)	2012/2013 Rdt (Qx/Ha)	2012/2013 RECOLTE (Tonnes)
BORDEAUX	105 000	61	636 200
CLERMONT-FERRAND+LIMOGES	135 430	60	818 058
DIJON	300 500	66	1 975 560
BESANCON	64 000	64	409 600
LILLE	303 000	88	2 666 400
AMIENS	546 000	87	4 775 800
LYON	114 820	62	713 000
MARSEILLE	7 000	40	27 700
CHALONS-EN-CHAMPAGNE	352 000	76	2 675 200
NANCY	161 350	64	1 024 900
STRASBOURG	37 000	73	270 000
RENNES	302 220	73	2 205 203
NANTES	377 450	73	2 756 640
ORLEANS	692 000	71	4 890 000
PARIS	238 000	79	1 880 200
POITIERS	406 600	69	2 811 500
ROUEN	271 800	87	2 367 378
CAEN	214 950	77	1 650 816
TOULOUSE	242 800	55	1 335 400
MONTPELLIER	7 800	41	32 280
TOTAL	4 879 720	74	35 921 835

Prévision de production 2012 : orges

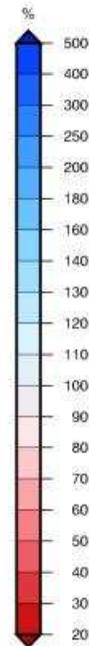
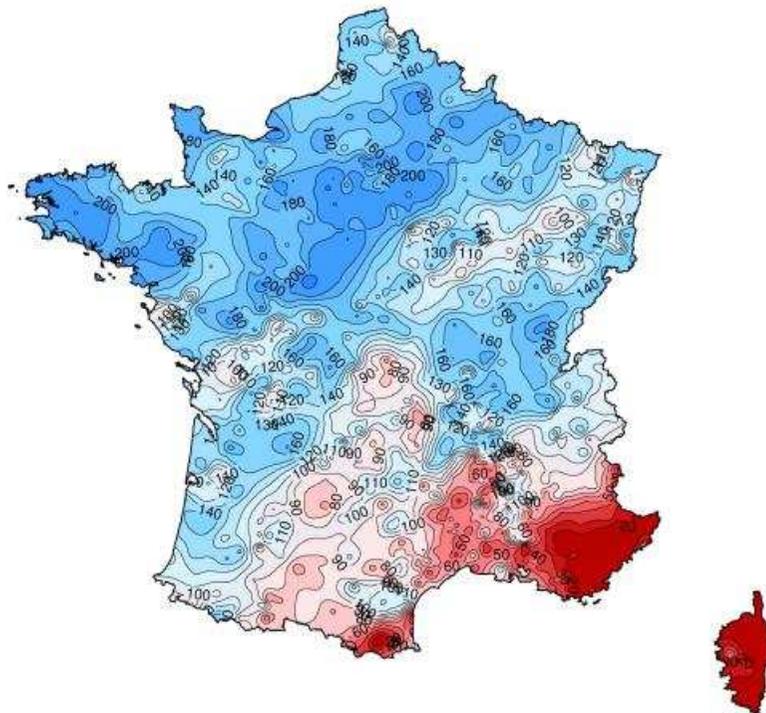
REGIONS	PRODUCTION		
	2012/2013 SURFACES (Has)	2012/2013 Rdt (Qx/Ha)	2012/2013 RECOLTE (Tonnes)
BORDEAUX	15 825	52	81 920
CLERMONT-FERRAND+LIMOGES	35 950	55	196 536
DIJON	192 900	61	1 173 800
BESANCON	32 000	54	173 450
LILLE	55 300	80	439 870
AMIENS	97 500	78	760 660
LYON	36 905	54	200 100
MARSEILLE	9 250	40	37 200
CHALONS-EN-CHAMPAGNE	311 890	68	2 122 650
NANCY	204 000	65	1 316 140
STRASBOURG	5 300	62	33 000
RENNES	56 550	79	445 830
NANTES	44 955	69	311 705
ORLEANS	239 000	71	1 695 000
PARIS	70 000	69	483 000
POITIERS	81 200	67	543 030
ROUEN	47 200	79	373 258
CAEN	38 800	72	281 012
TOULOUSE	78 000	57	444 000
MONTPELLIER	9 700	41	39 900
TOTAL	1 662 225	67	11 152 061

Prévision de production 2012 : colza

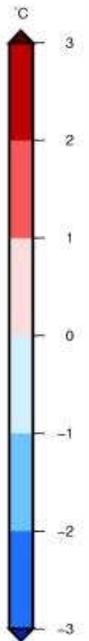
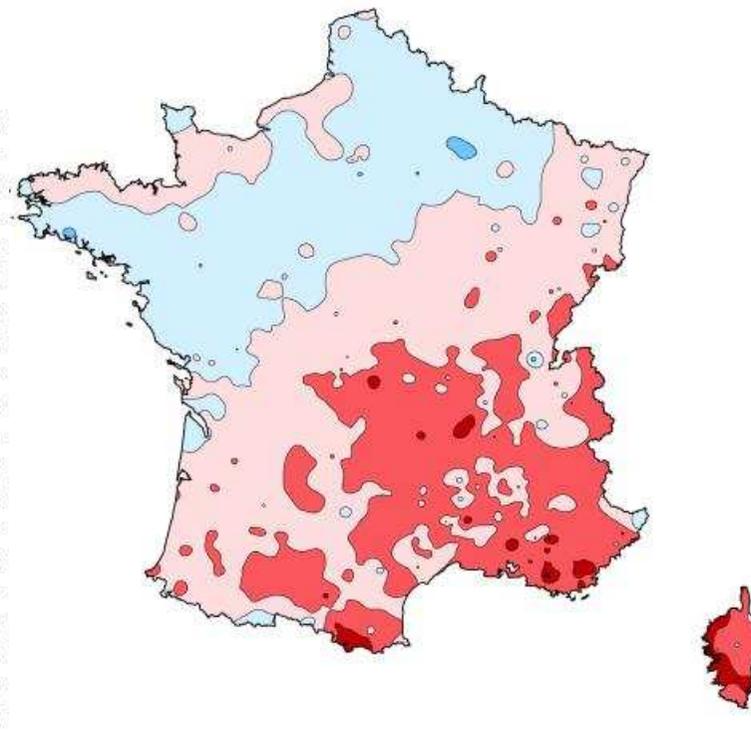
REGIONS	PRODUCTION		
	2012/2013 SURFACES (Has)	2012/2013 Rdt (Qx/Ha)	2012/2013 RECOLTE (Tonnes)
BORDEAUX	14 325	27	38 600
CLERMONT-FERRAND+LIMOGES	20 371	25	51 255
DIJON	178 600	27	490 640
BESANCON	29 000	28	81 200
LILLE	32 000	40	128 000
AMIENS	140 000	38	536 000
LYON	18 275	29	52 950
MARSEILLE	3 350	21	7 050
CHALONS-EN-CHAMPAGNE	197 660	34	672 000
NANCY	137 500	26	357 500
STRASBOURG	3 500	32	11 200
RENNES	40 600	34	139 670
NANTES	67 730	35	235 810
ORLEANS	329 500	32	1 045 000
PARIS	82 000	35	287 000
POITIERS	110 930	32	355 900
ROUEN	90 600	36	323 170
CAEN	49 000	35	173 460
TOULOUSE	37 820	27	102 114
MONTPELLIER	4 000	24	9 600
TOTAL	1 586 761	32	5 098 119

Météo juin 2012

Précipitations



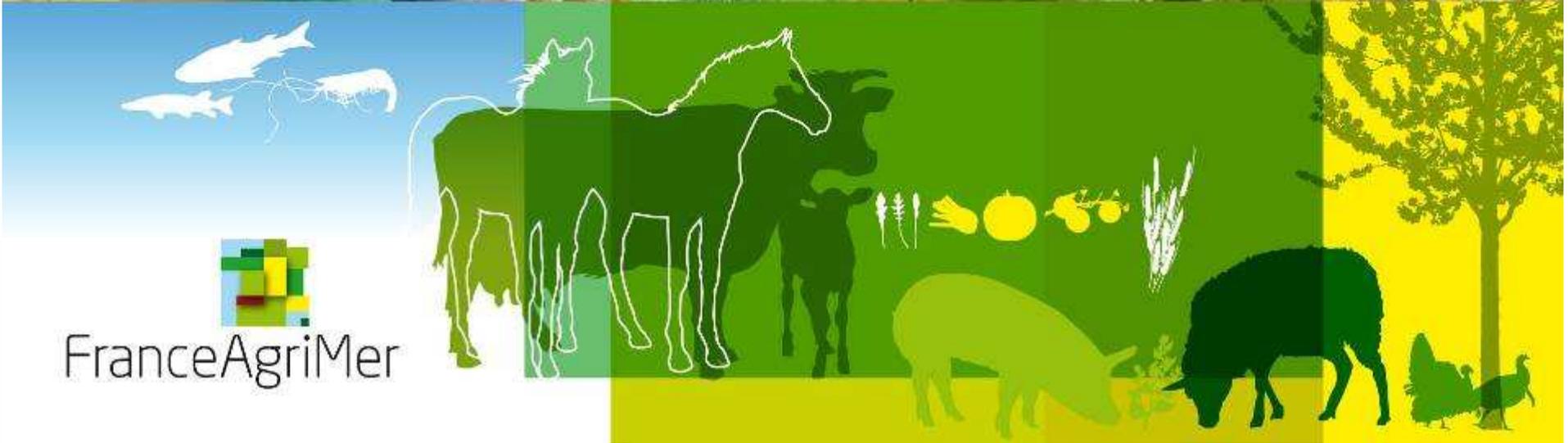
Températures



Source Météo France

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