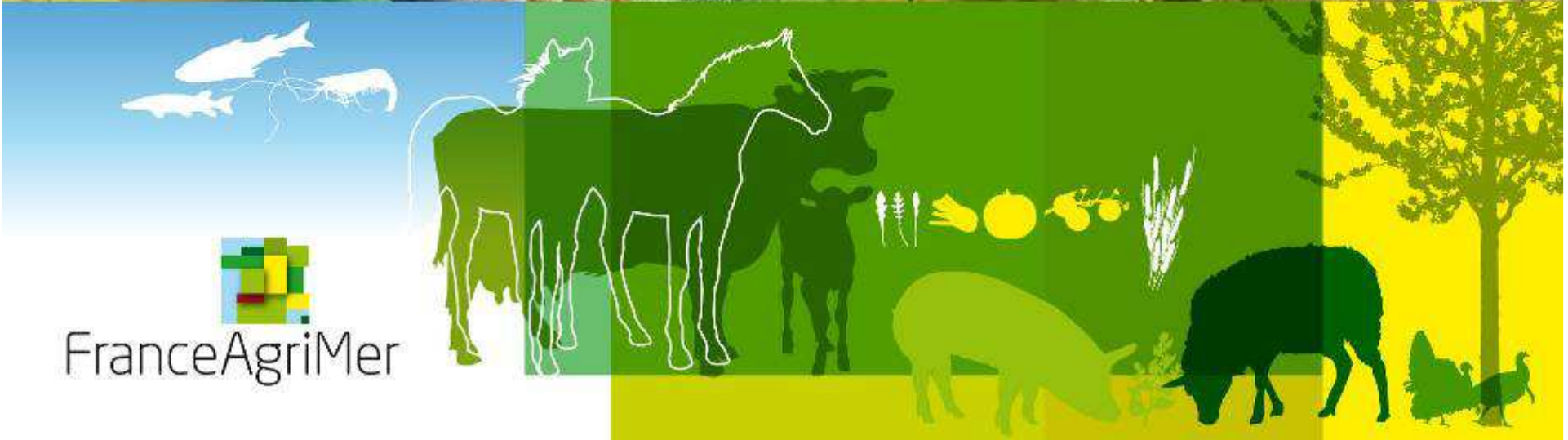


CÉRÉALES /
FRUITS ET LÉGUMES /
HORTICULTURE /
LAIT /
OLÉO-PROTÉAGINEUX /
PÊCHE ET AQUACULTURE /
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /
SUCRE /
VIANDES BLANCHES /
VIANDES ROUGES /
VINS /

FranceAgriMer



FranceAgriMer

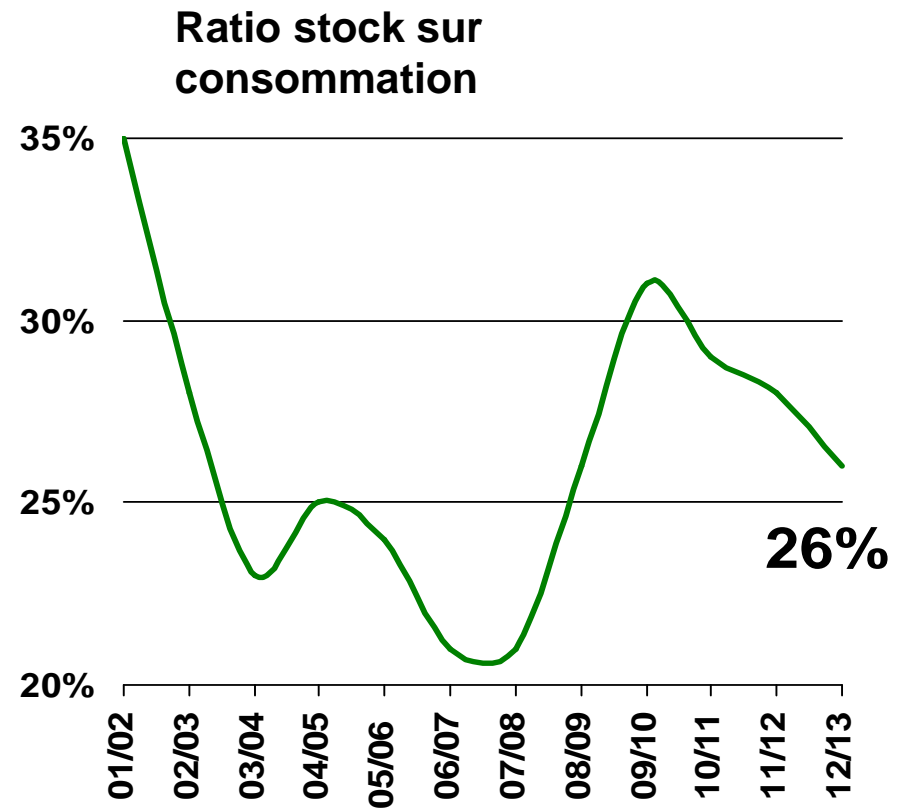
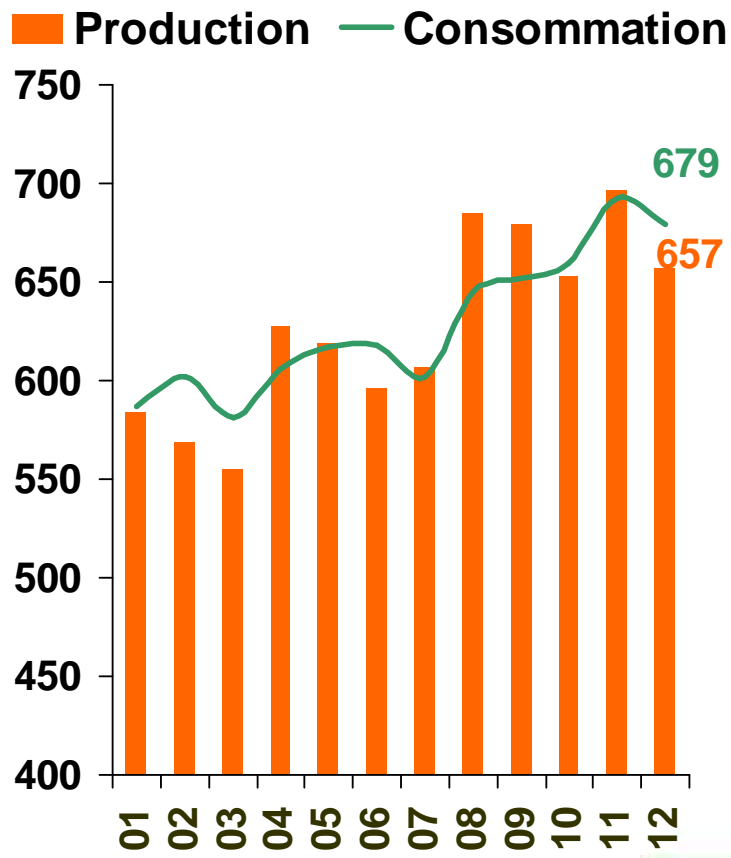


Marché mondial

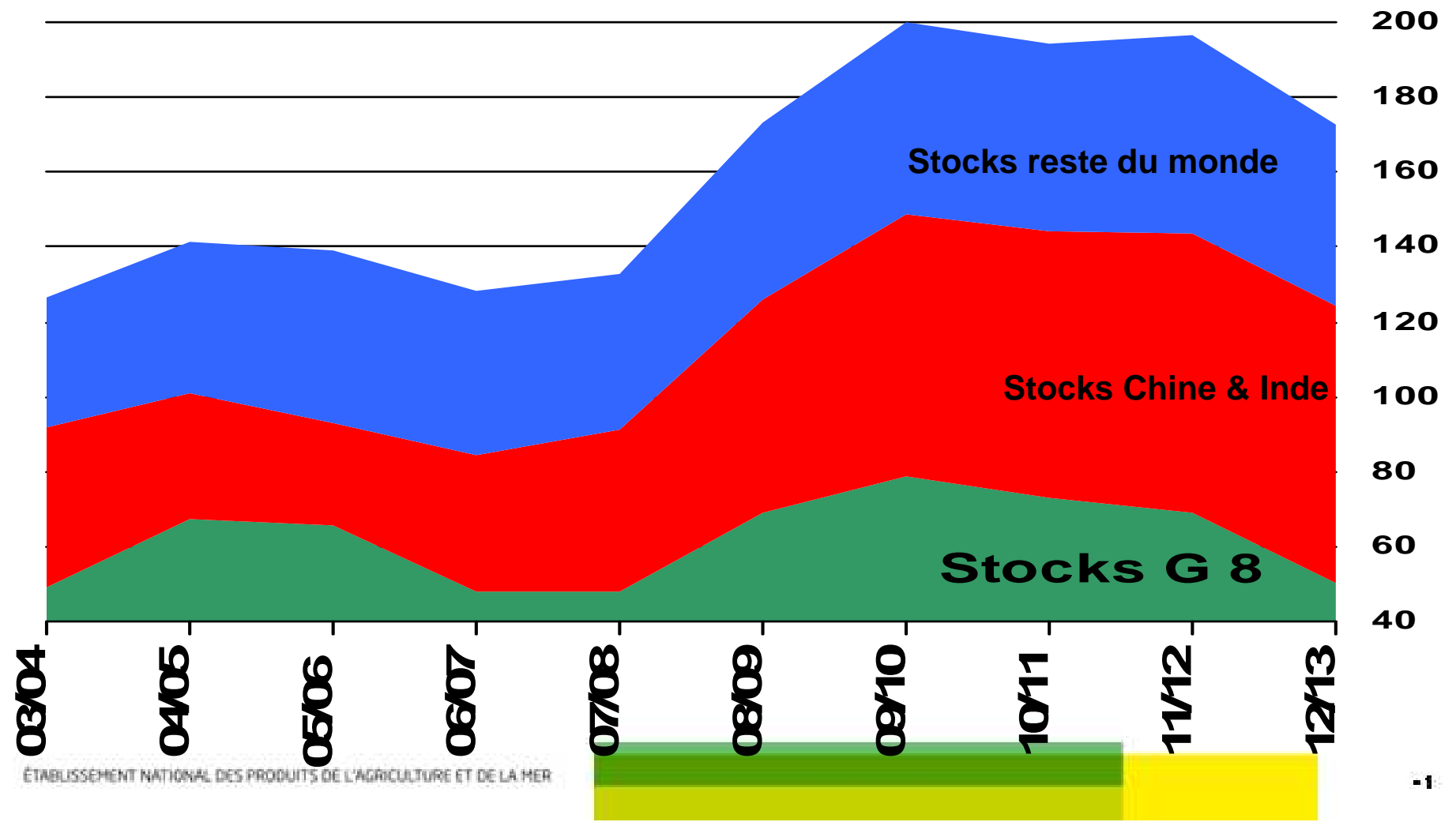
Points clefs

- Bilan blé déficitaire
 - Sécheresse en Russie
 - Consommation en hausse
 - Forte demande pour le blé français
- Bilan maïs déséquilibré
 - Chute de la production aux Etats Unis
 - Quid du Brésil et de l'Argentine ?

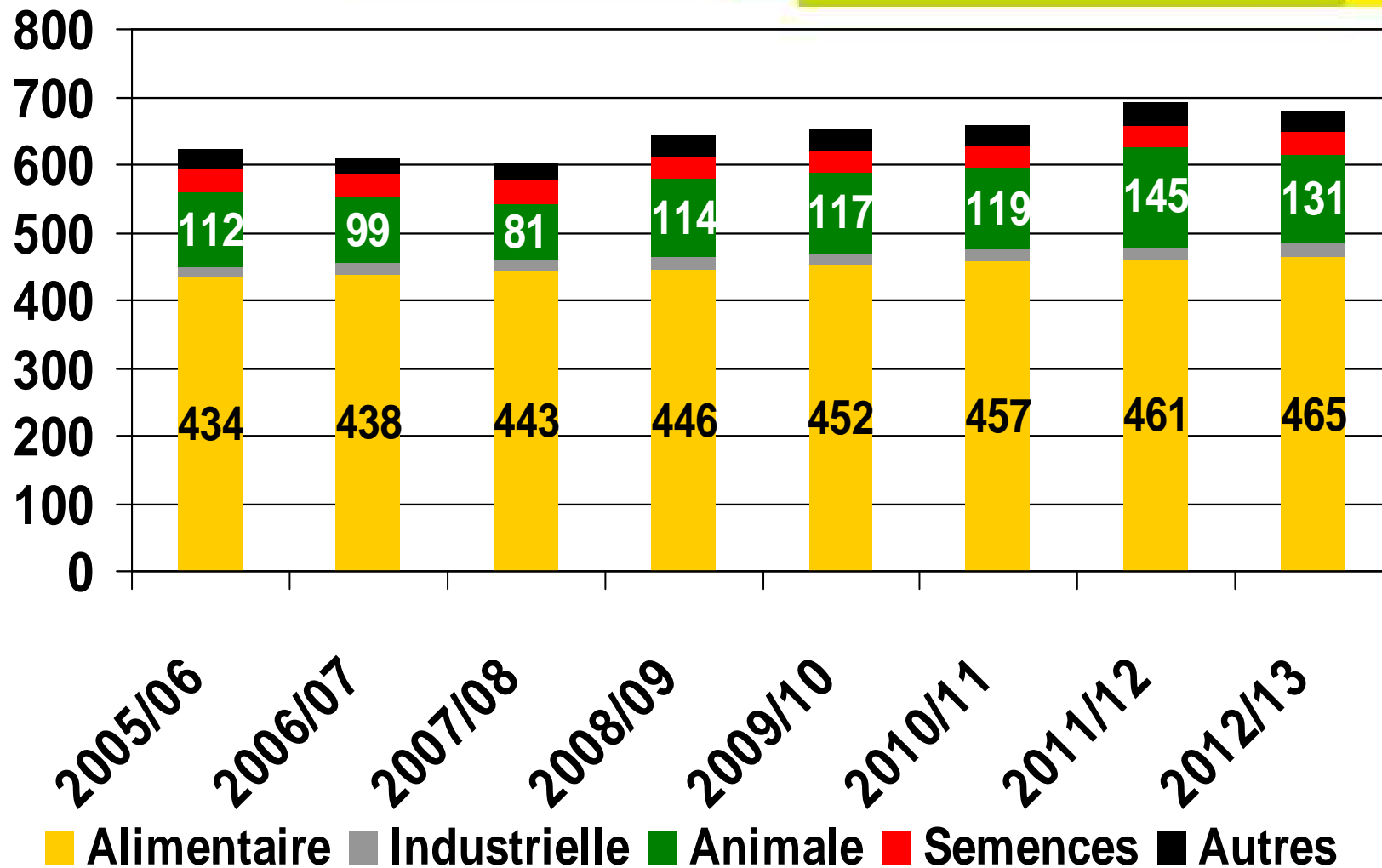
Bilan mondial blé 2012/13 : production, consommation et stocks



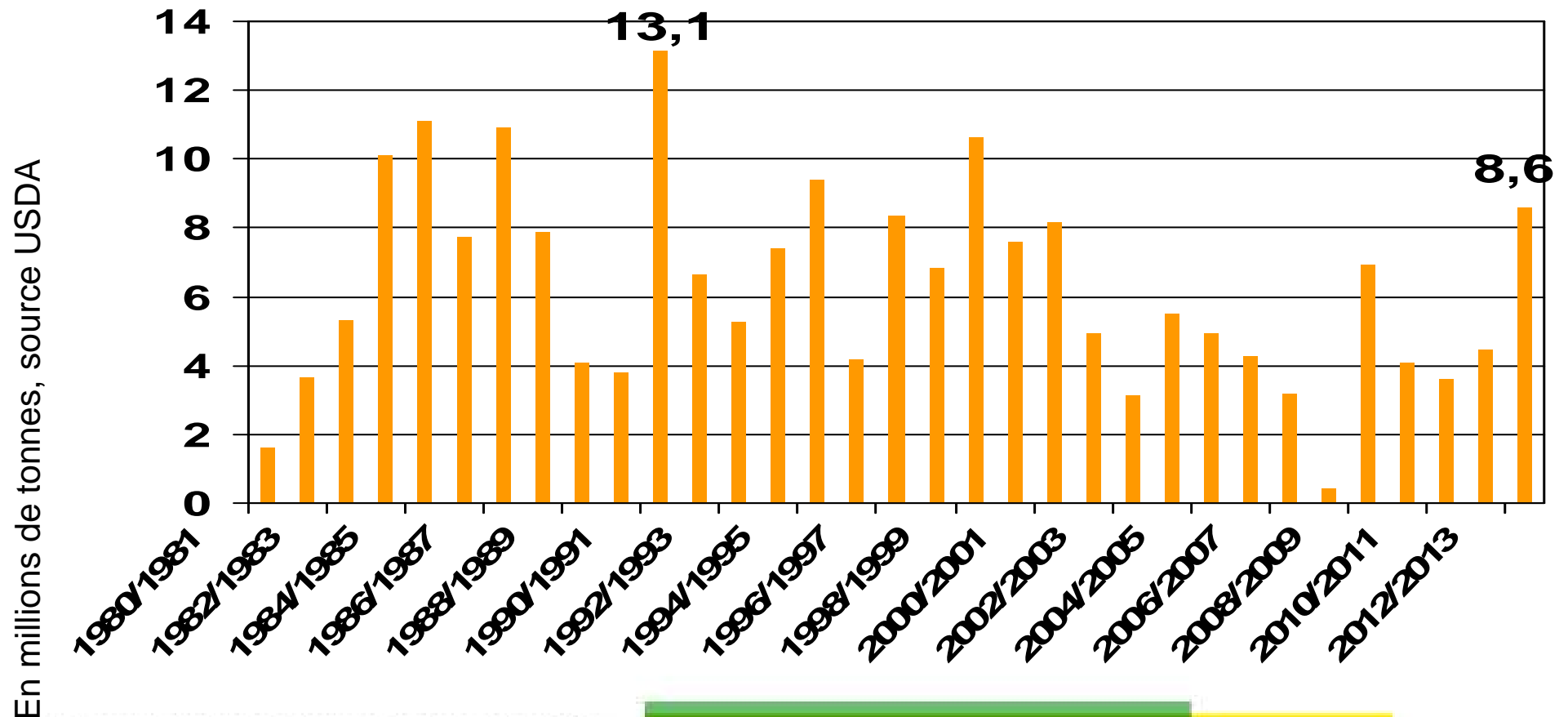
Répartition des stocks mondiaux de blé en 2012/13



Consommation mondiale de blé

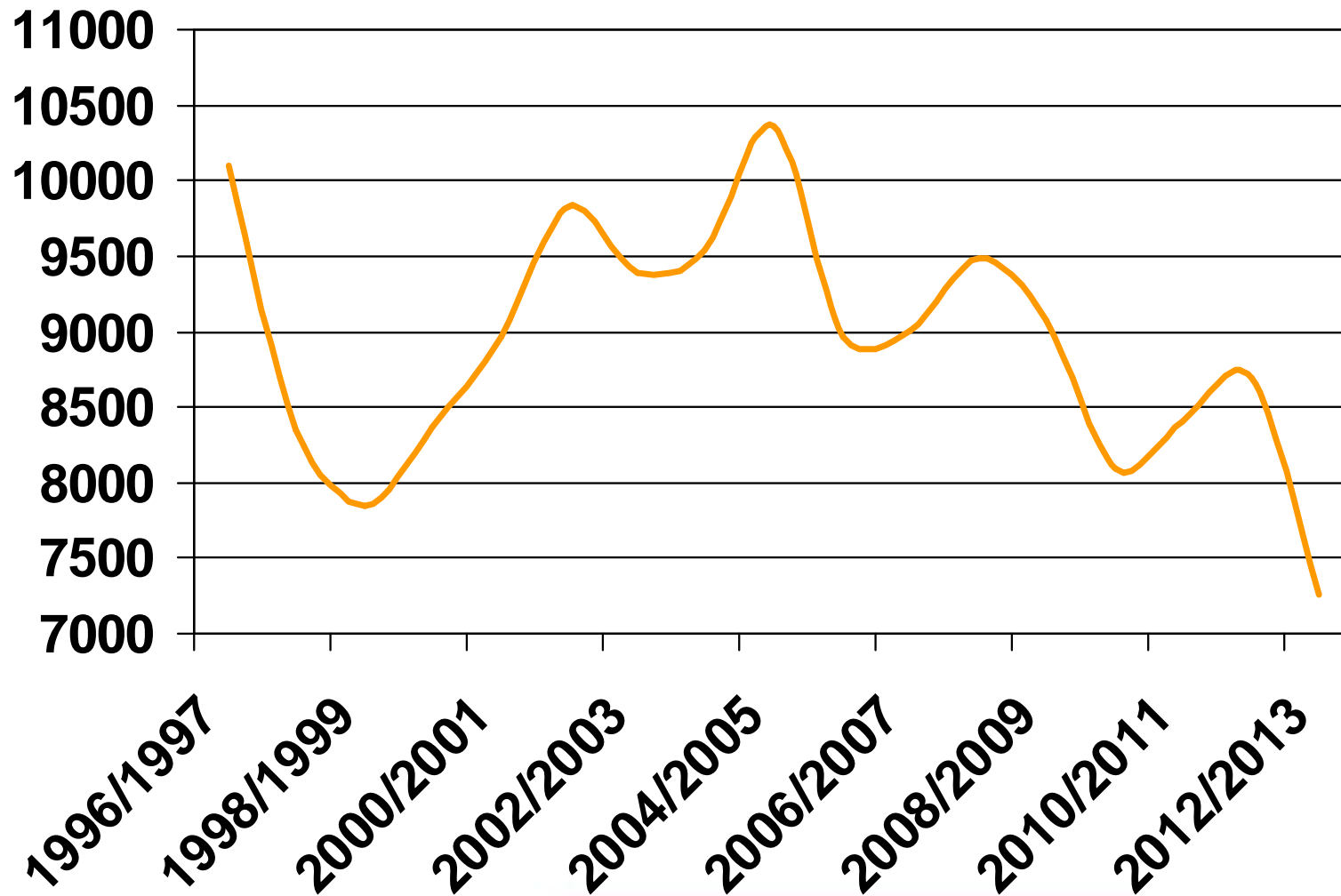


Blé américain : consommation animale

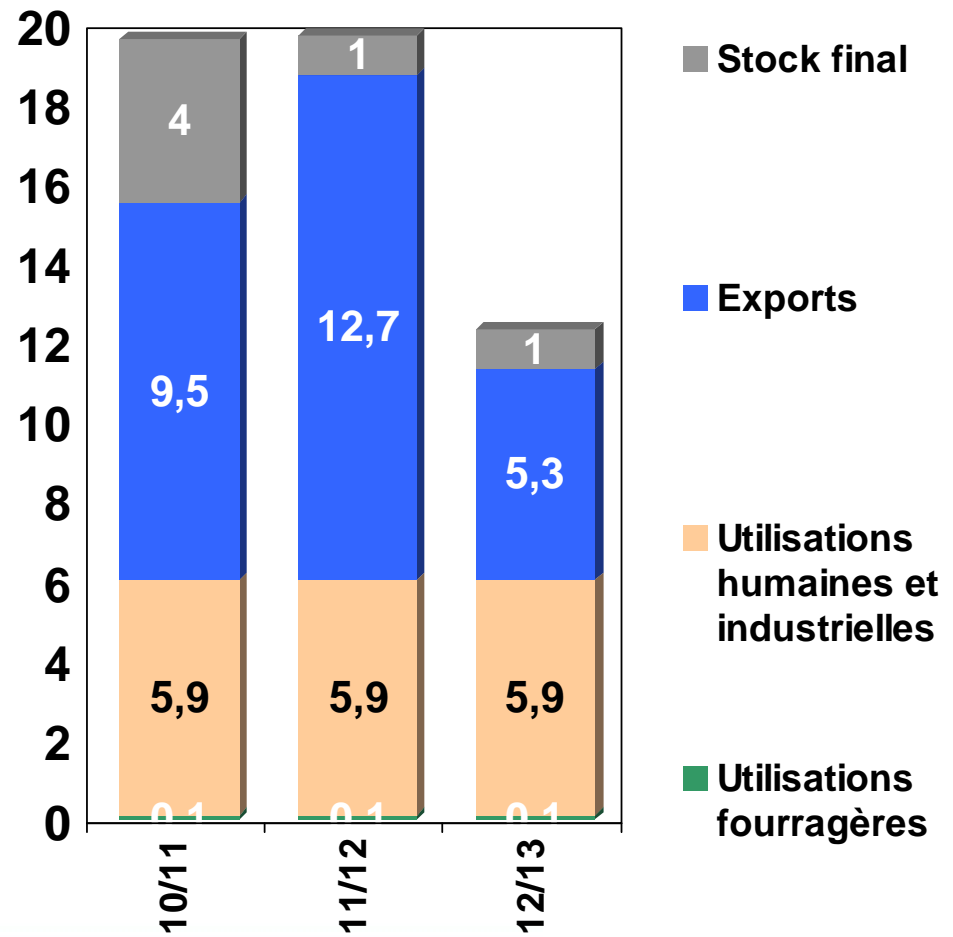
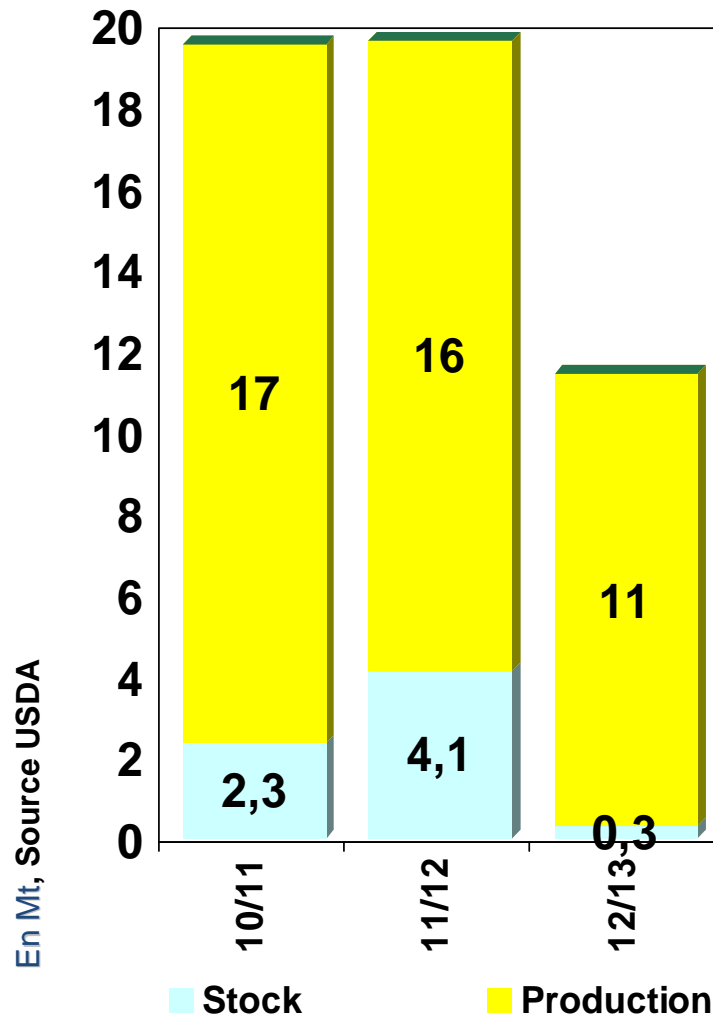


Surfaces dédiées au blé Mercosur

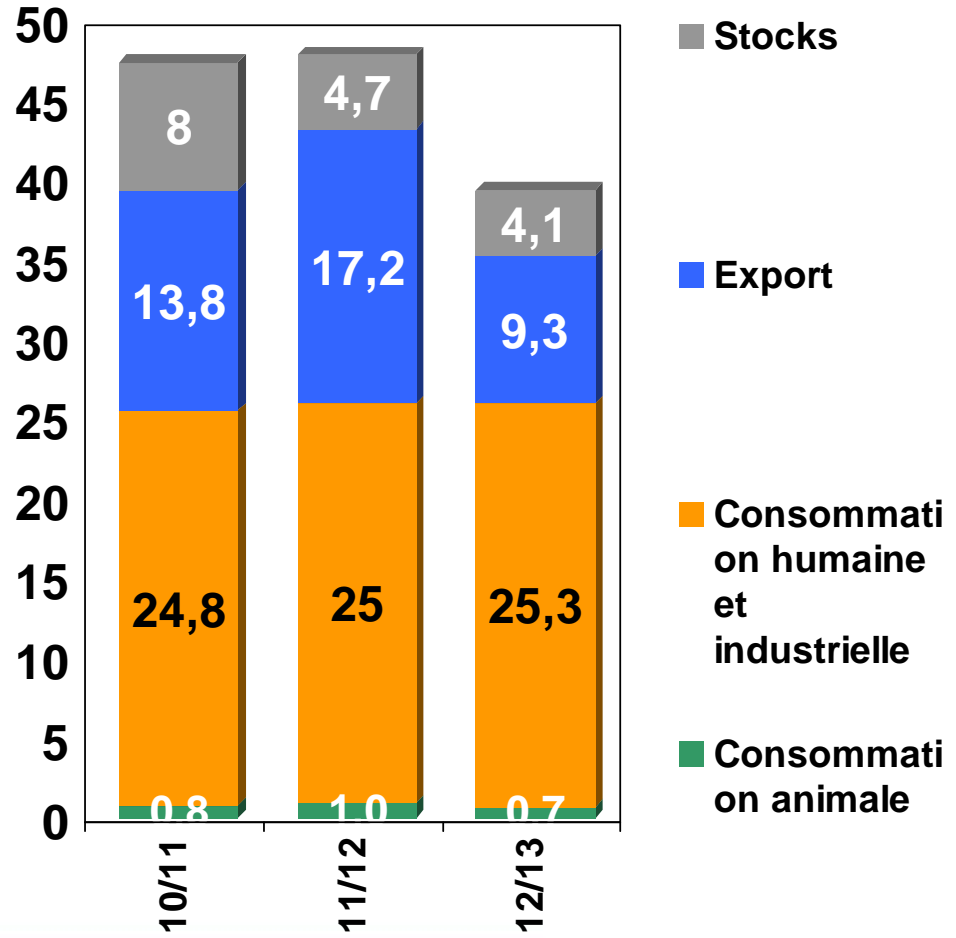
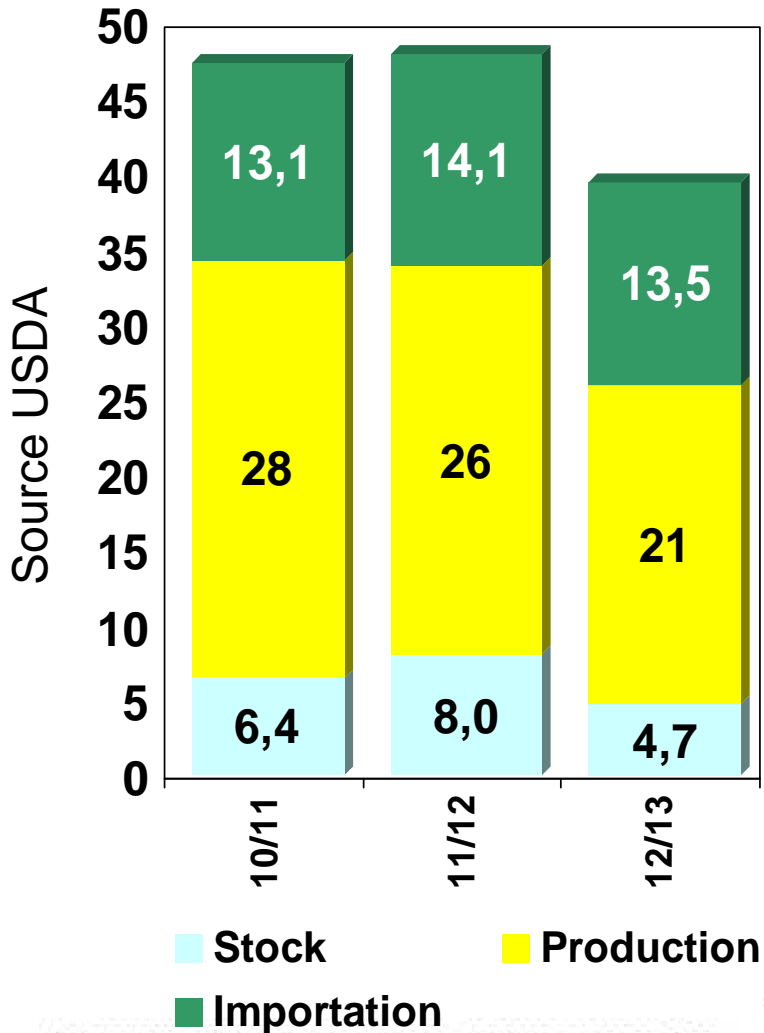
En 1 000 ha, source : USDA



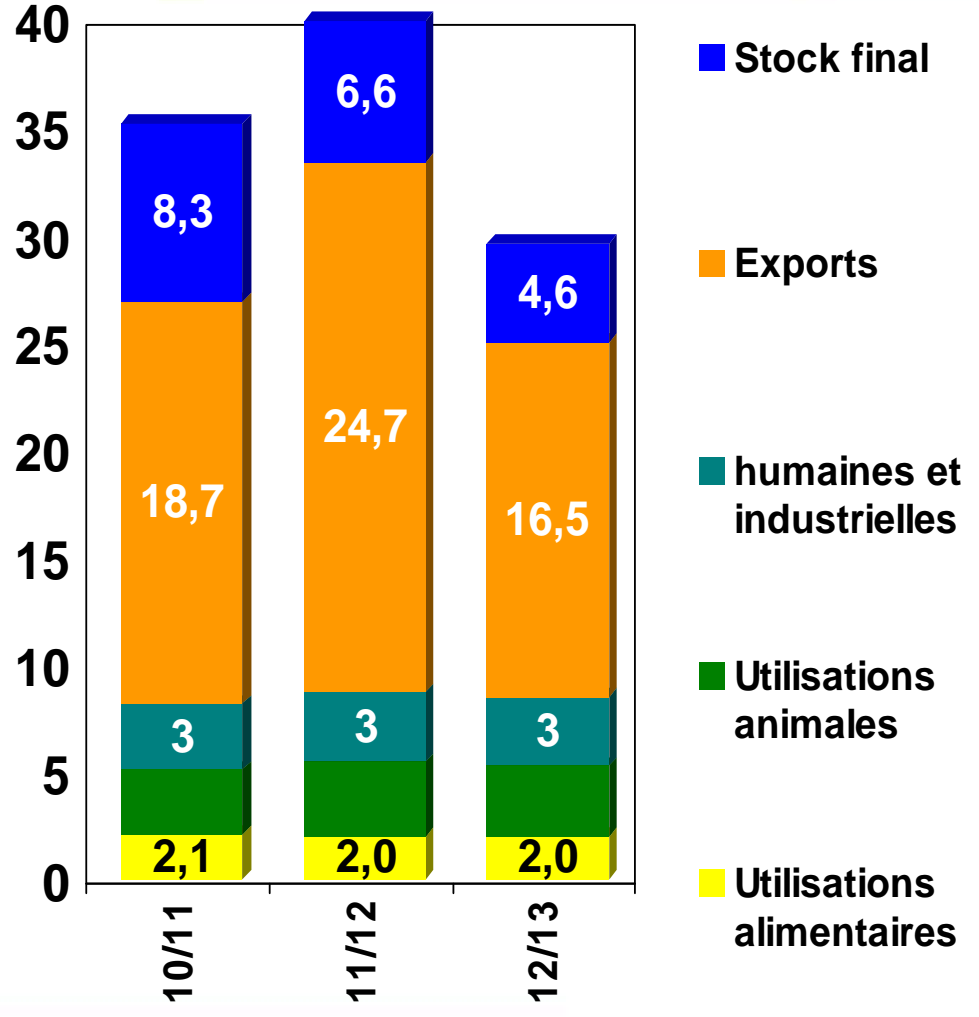
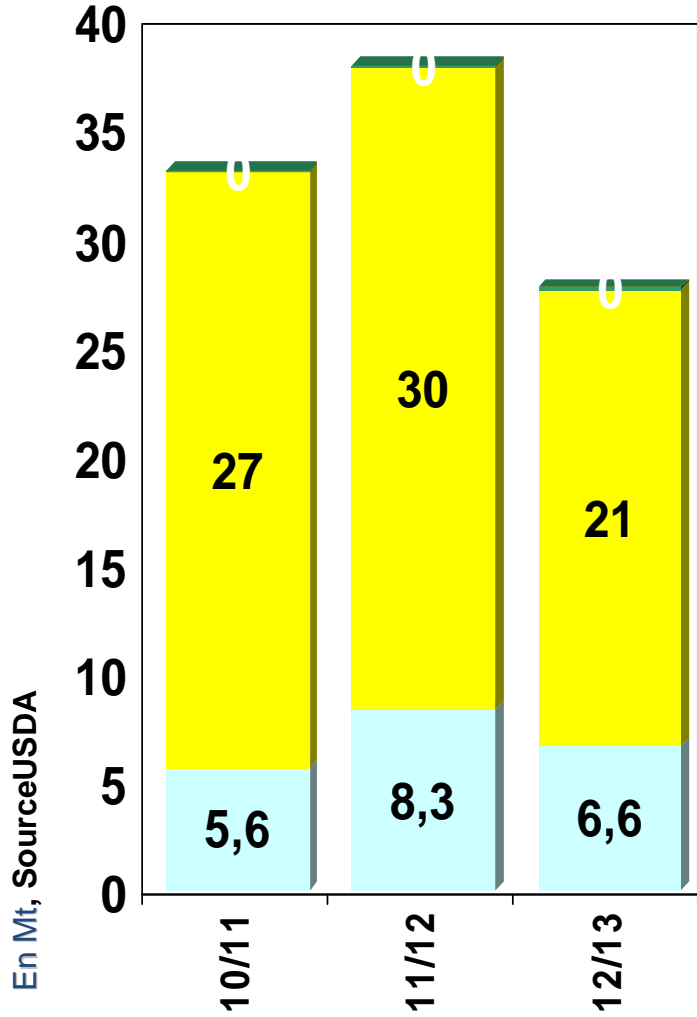
Argentine : bilan blé



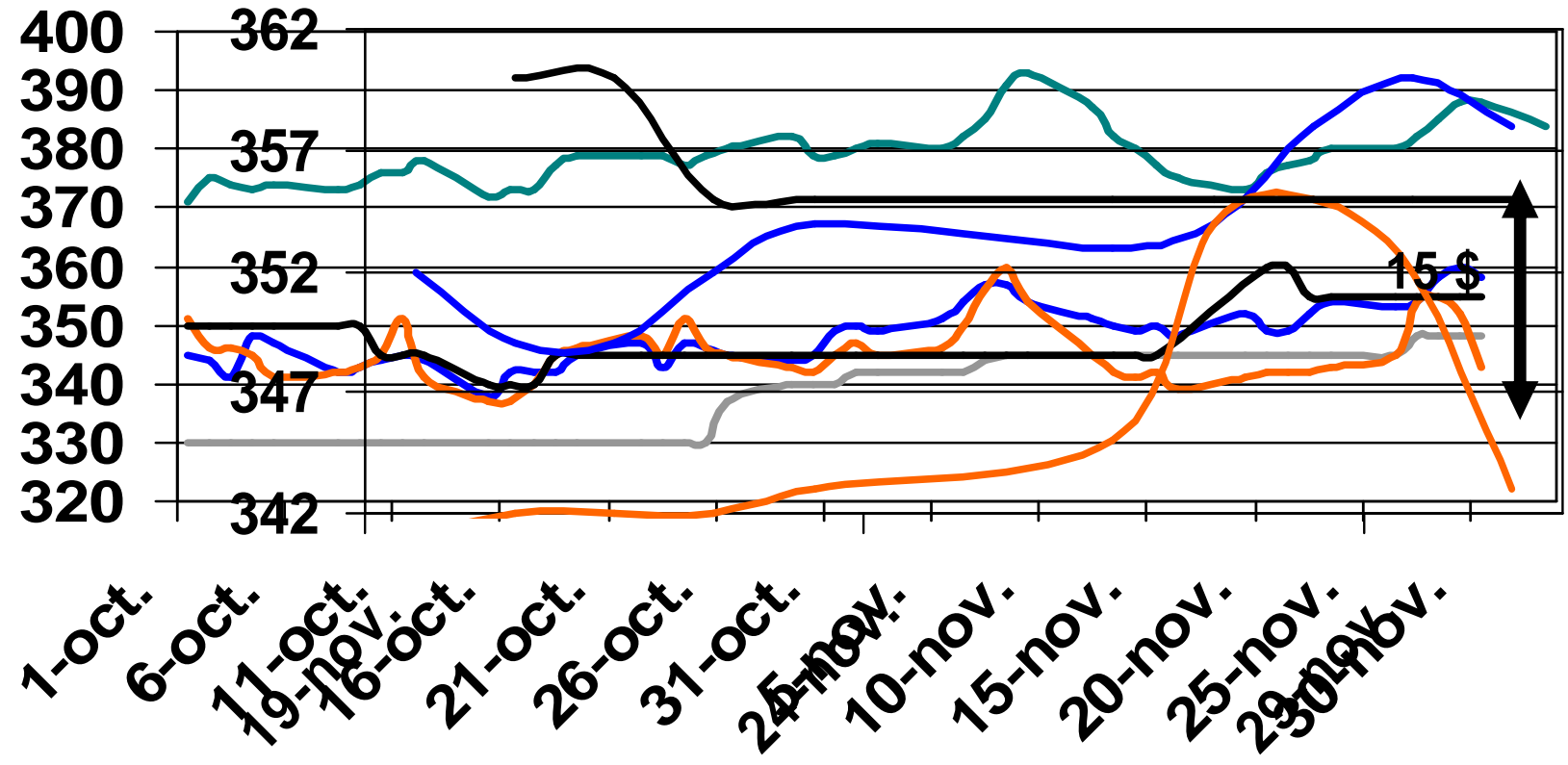
Bilan blé Amérique du Sud



Australie : bilan blé



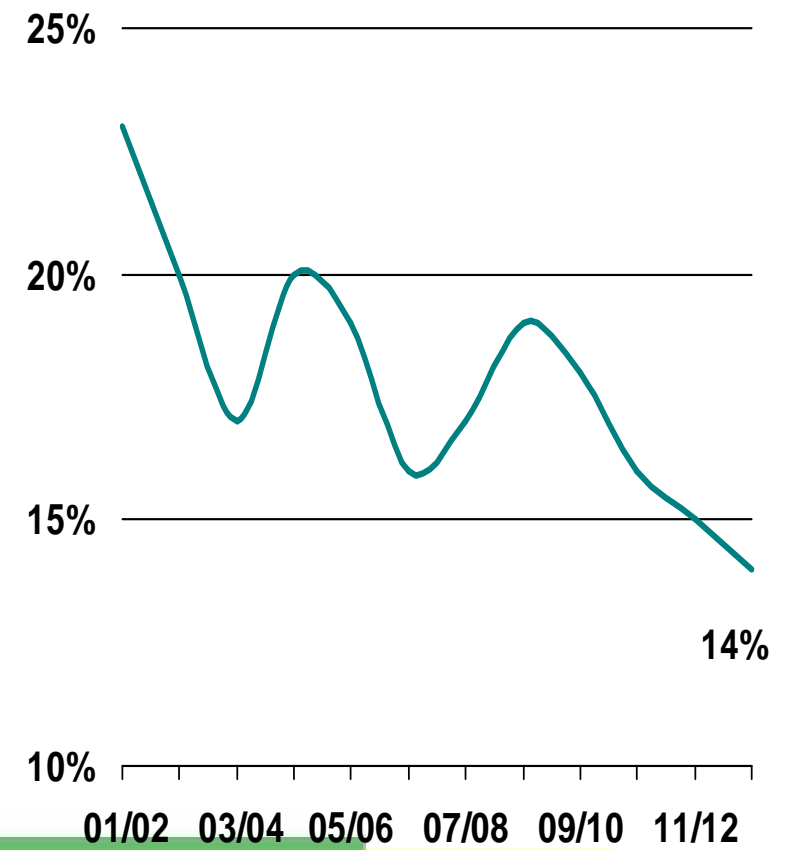
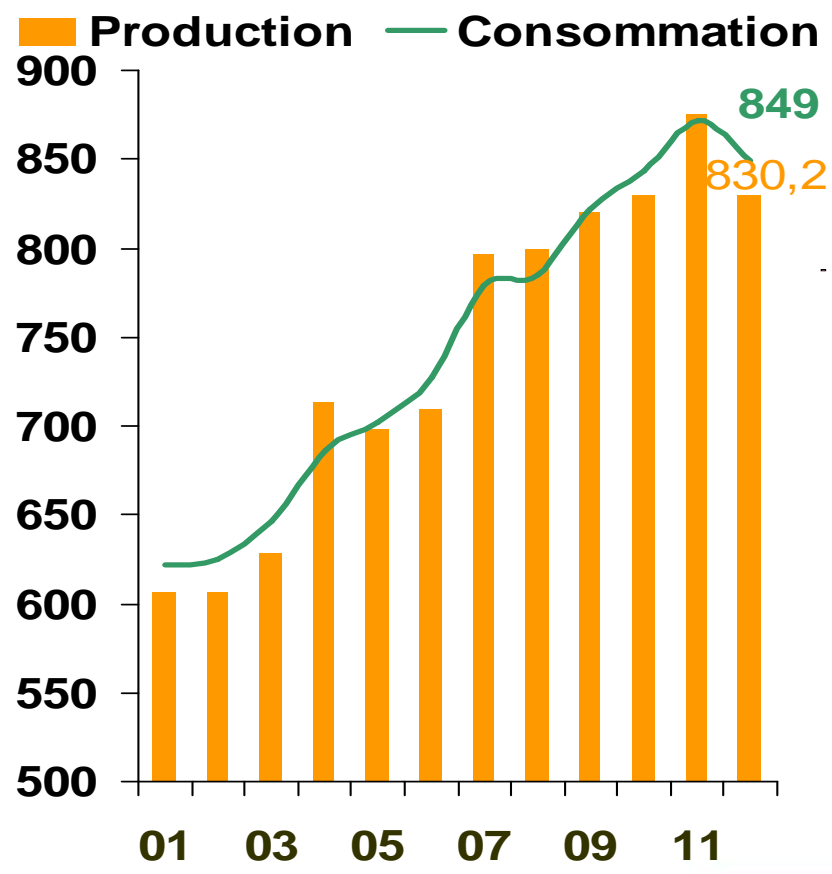
Cours du blé



- Argentin Up River
- Fob Rouen
- Milling mer Noire
- Blé blanc Aust. Occ.
- SRW fob
- SRW fob Milling mer Noire

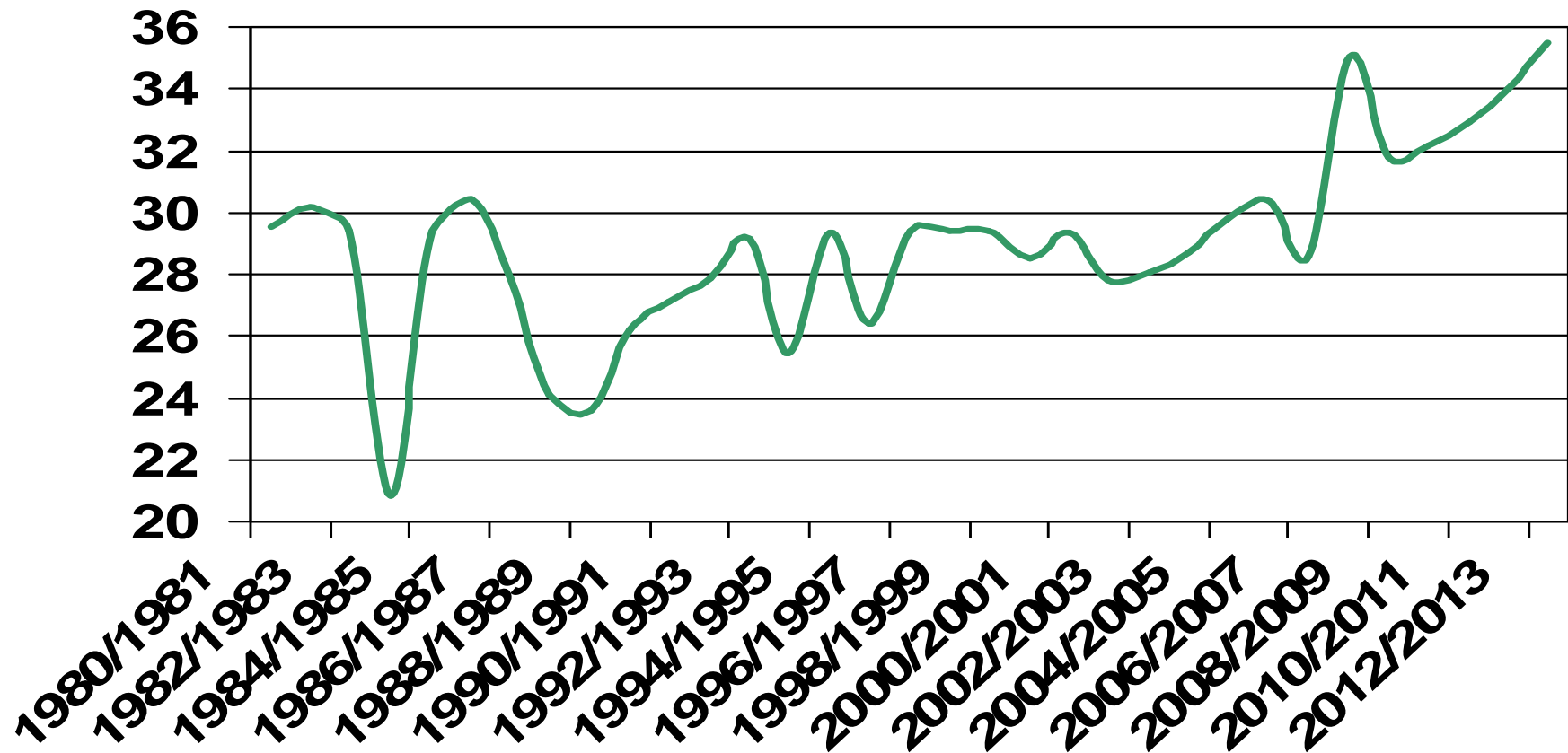
Bilan mondial maïs 2012/13

Ratio stock sur consommation

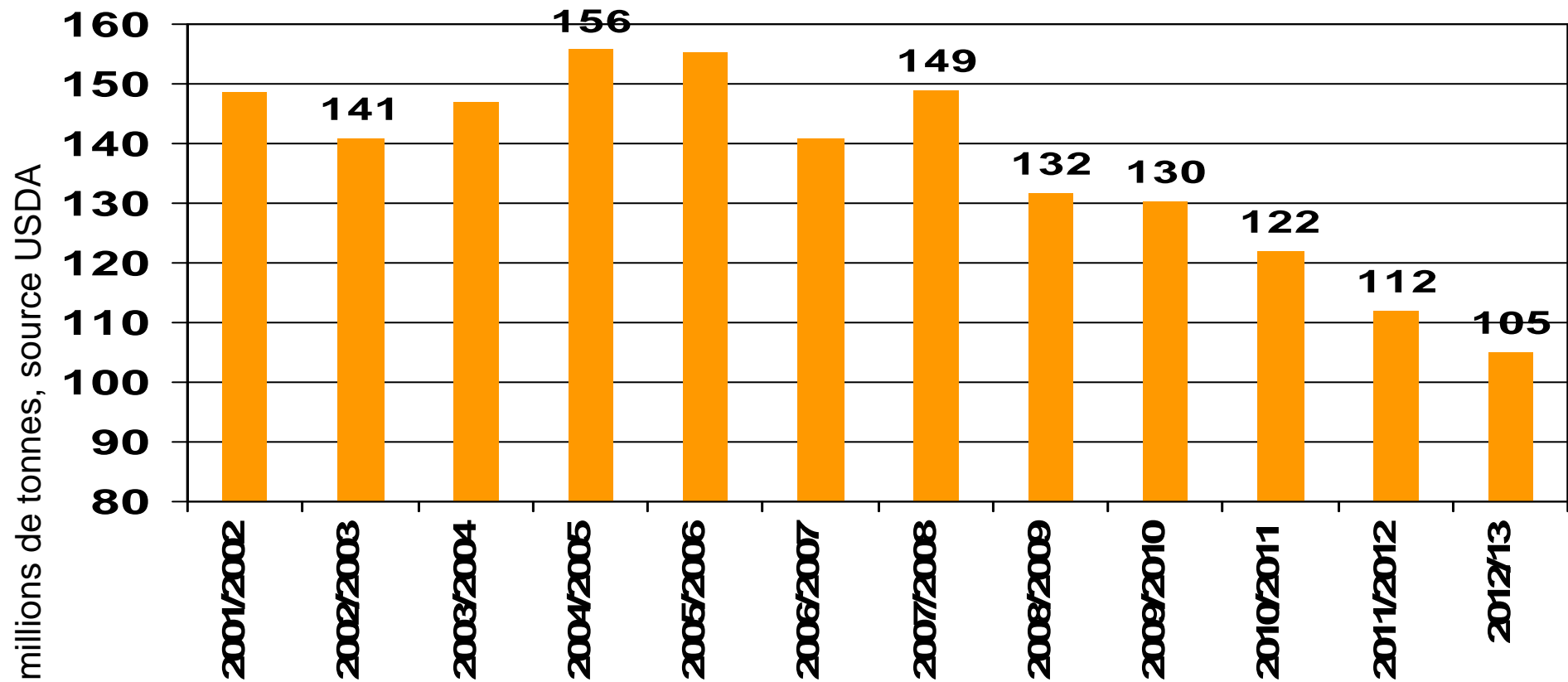


Surfaces de maïs récoltées aux Etats Unis

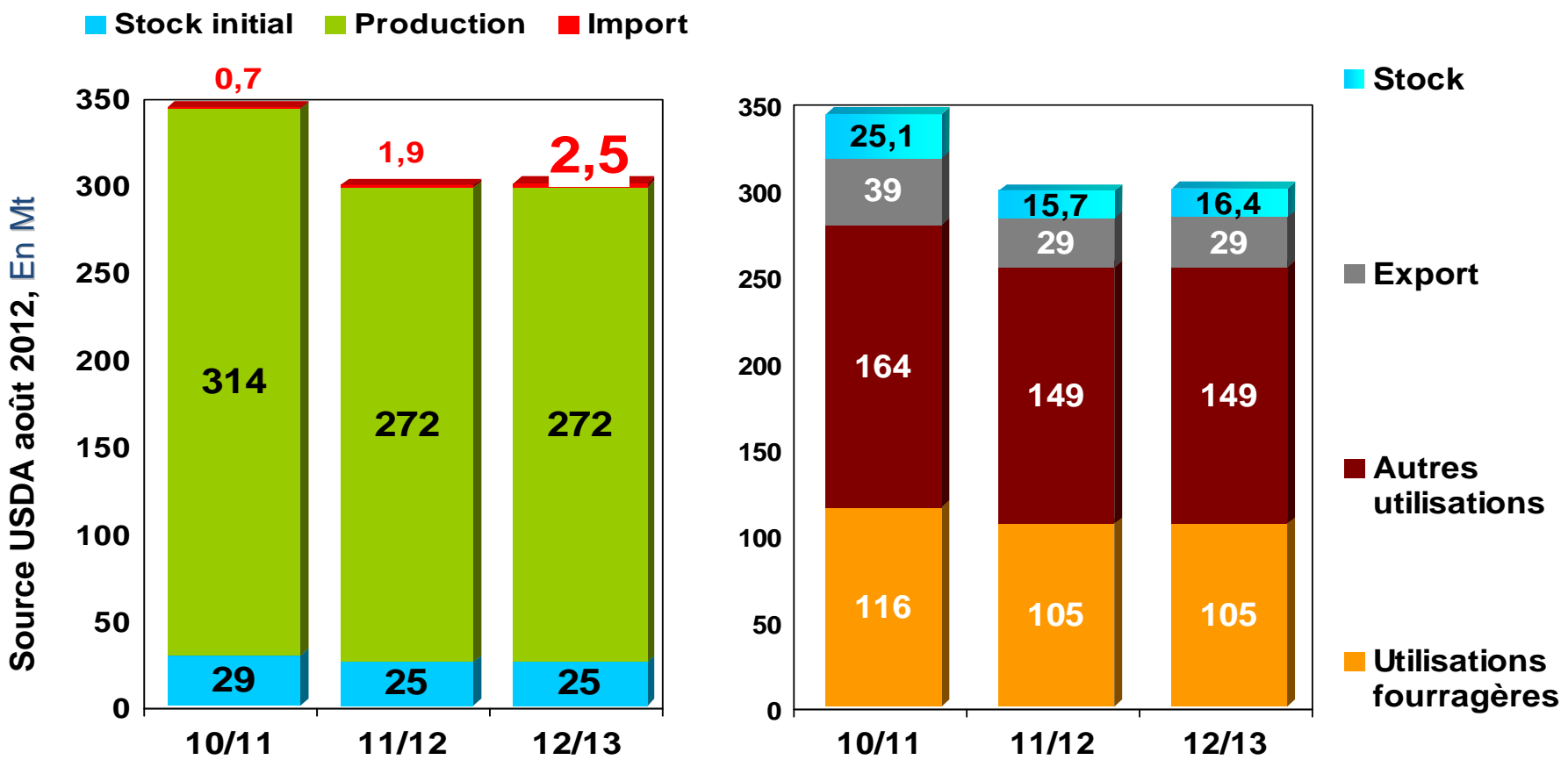
En Mha, source USDA



Mais américain : consommation animale



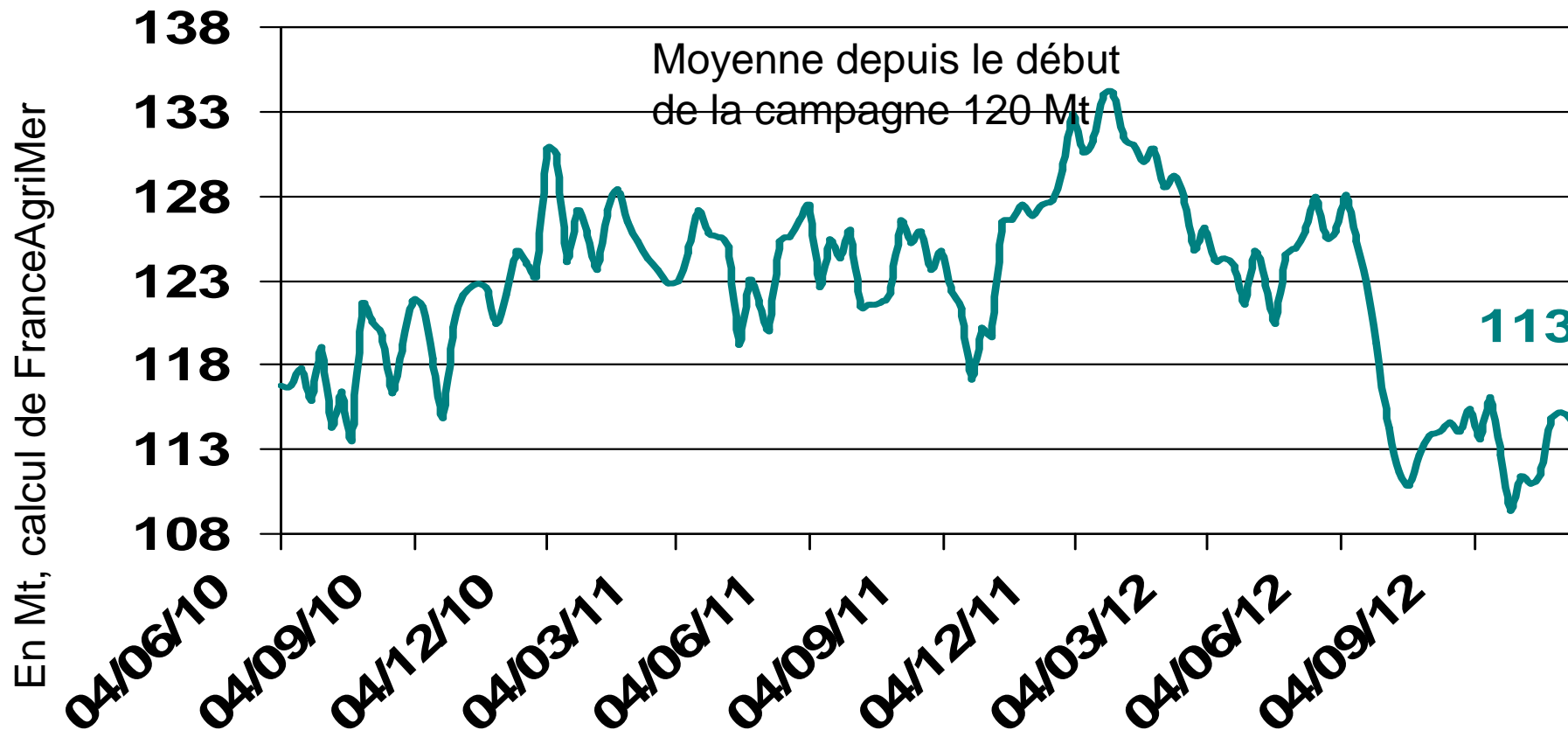
Etats-Unis, bilan maïs 2012/13 : un stock attendu de l'ordre de 16 Mt



Production d'éthanol et consommation de maïs

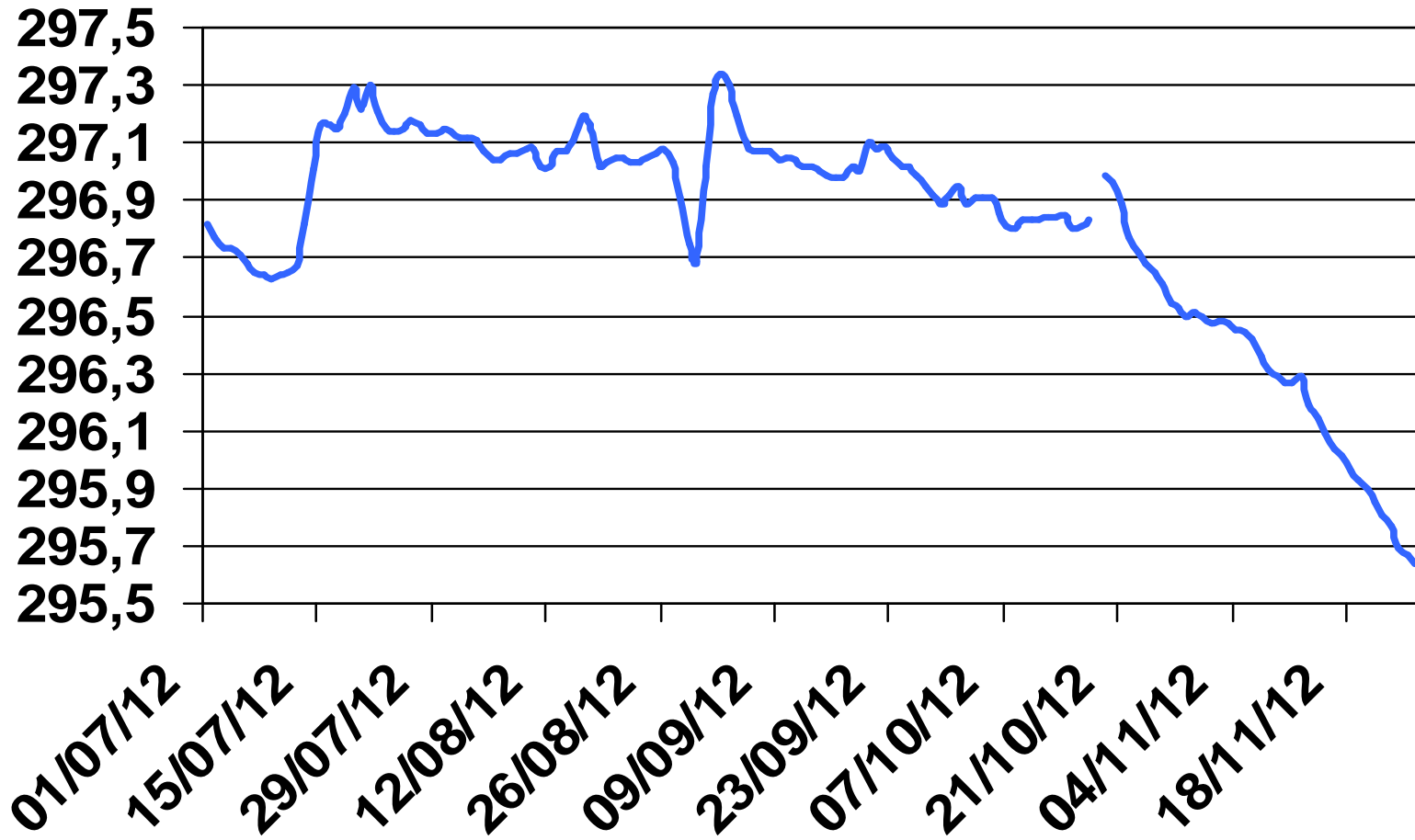
- Volume d'éthanol produit et tonnage de maïs utilisé
- **1 boisseau de maïs => 2,8 gallons d'éthanol**
- Sachant que : 1 boisseau US de maïs vaut 0,02540 tonne (25,4 kg)
- 1 gallon = 3,78541178 litres donc 2,8 gallons = 10,599 litres
- On a l'équivalence : 25,4 kg de maïs => 10,599 litres d'éthanol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

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



Hauteur du Mississippi à Jackson, Louisiane

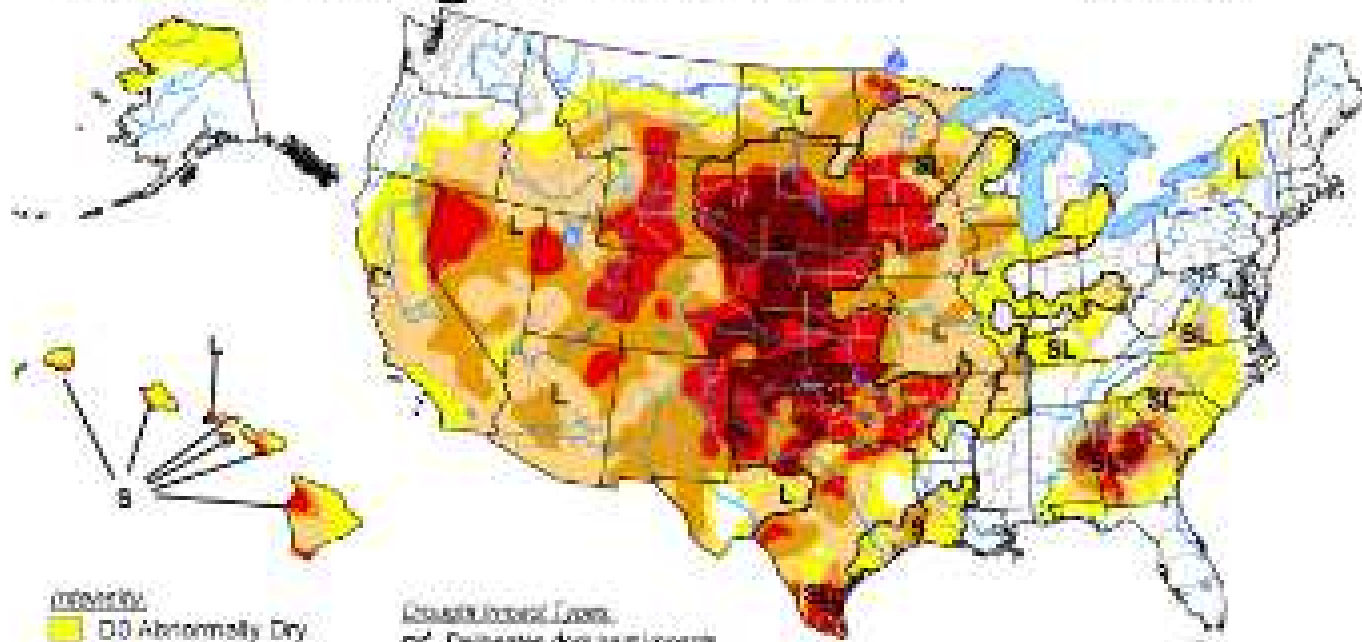
En pieds américains, source : USGeological Survey



U.S. Drought Monitor

U.S. Drought Monitor

November 20, 2012
Valid 7 a.m. EST



Intensity

- D0 Abnormally Dry
- D1 Drought - Moderate
- D2 Drought - Severe
- D3 Drought - Extreme
- D4 Drought - Exceptional

Counts Local Units

- M** - Delineates drought-impacted
- S** - Short-Term, typically <60 months (e.g. agriculture, grasslands)
- L** - Long-Term, typically >60 months (e.g. hydrology, ecology)

The Drought Monitor focuses on broad-scale conditions. Local conditions may vary. See accompanying text summary for forecast statements.

<http://droughtmonitor.unl.edu/>

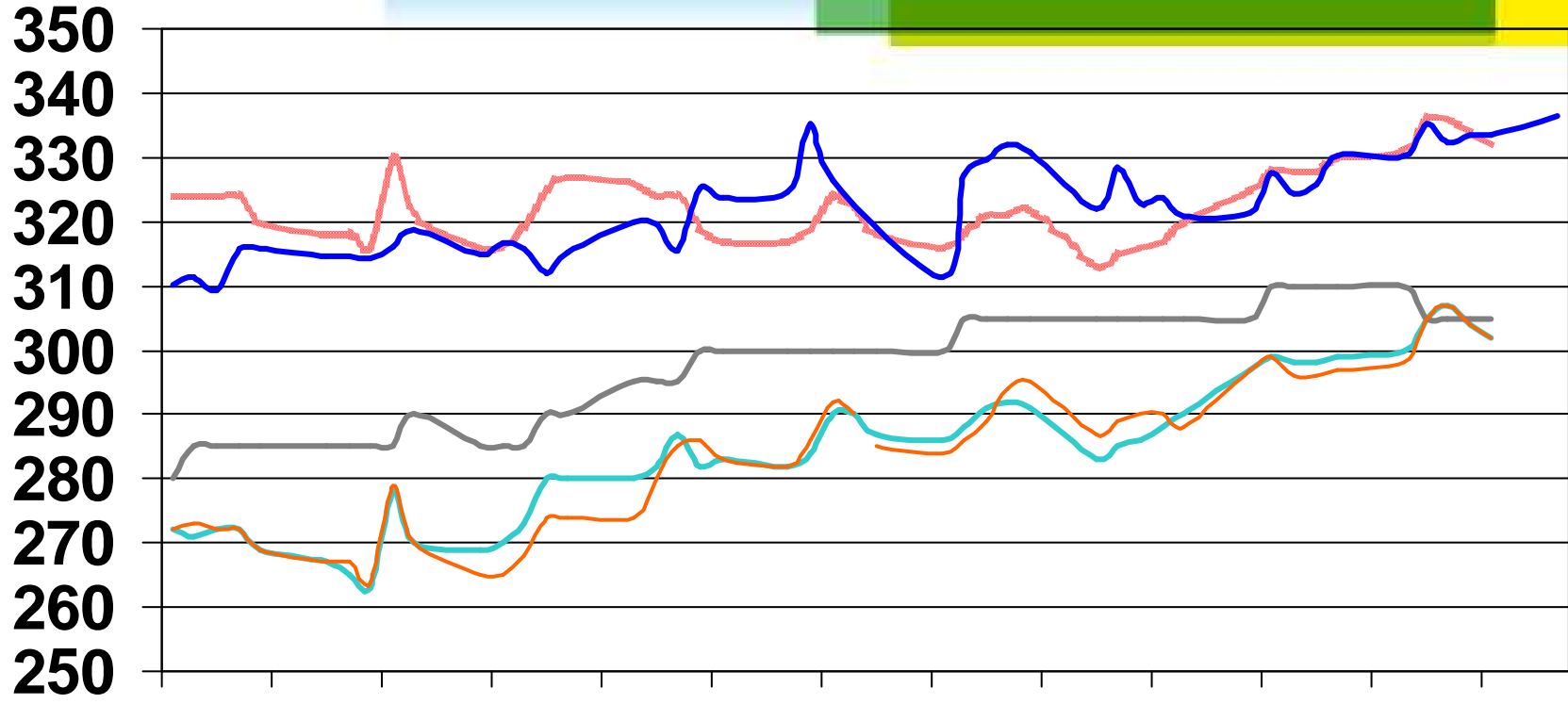


Released Wednesday, November 21, 2012
Author: Eric Luebbehusen, U.S. Department of Agriculture

Cône Sud : situation des semis

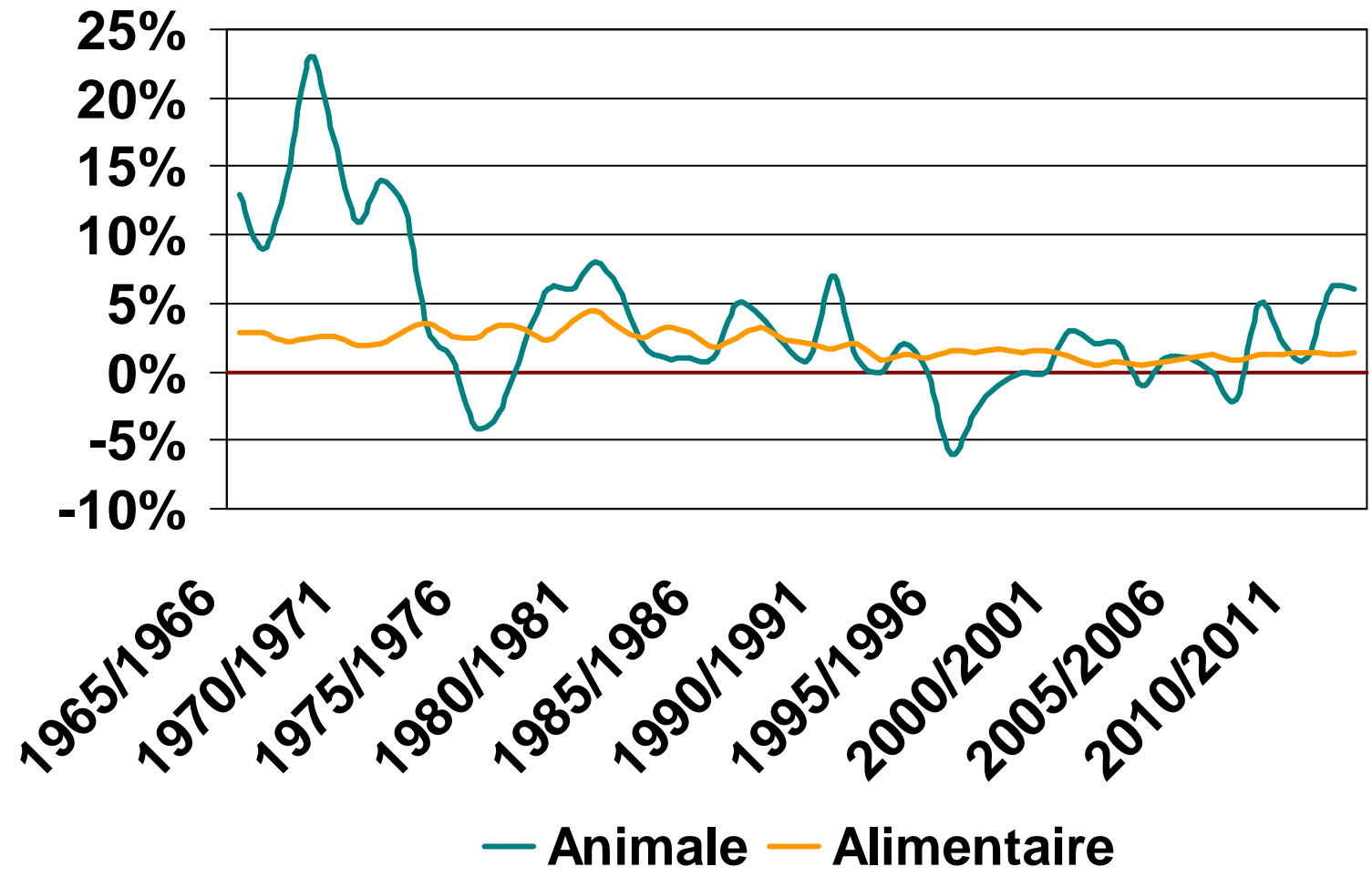
- Précipitations abondantes fin octobre avec environ 7 MHa sous les eaux et des conséquences sur les semis :
- Maïs : Début nov. 40% des surfaces semées contre 57% l'an dernier. Si les retards persistent la surface de maïs pourrait baisser à 3 Mha soit une production de 21-22MT (selon la Bolsa de Buenos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

Cours du maïs

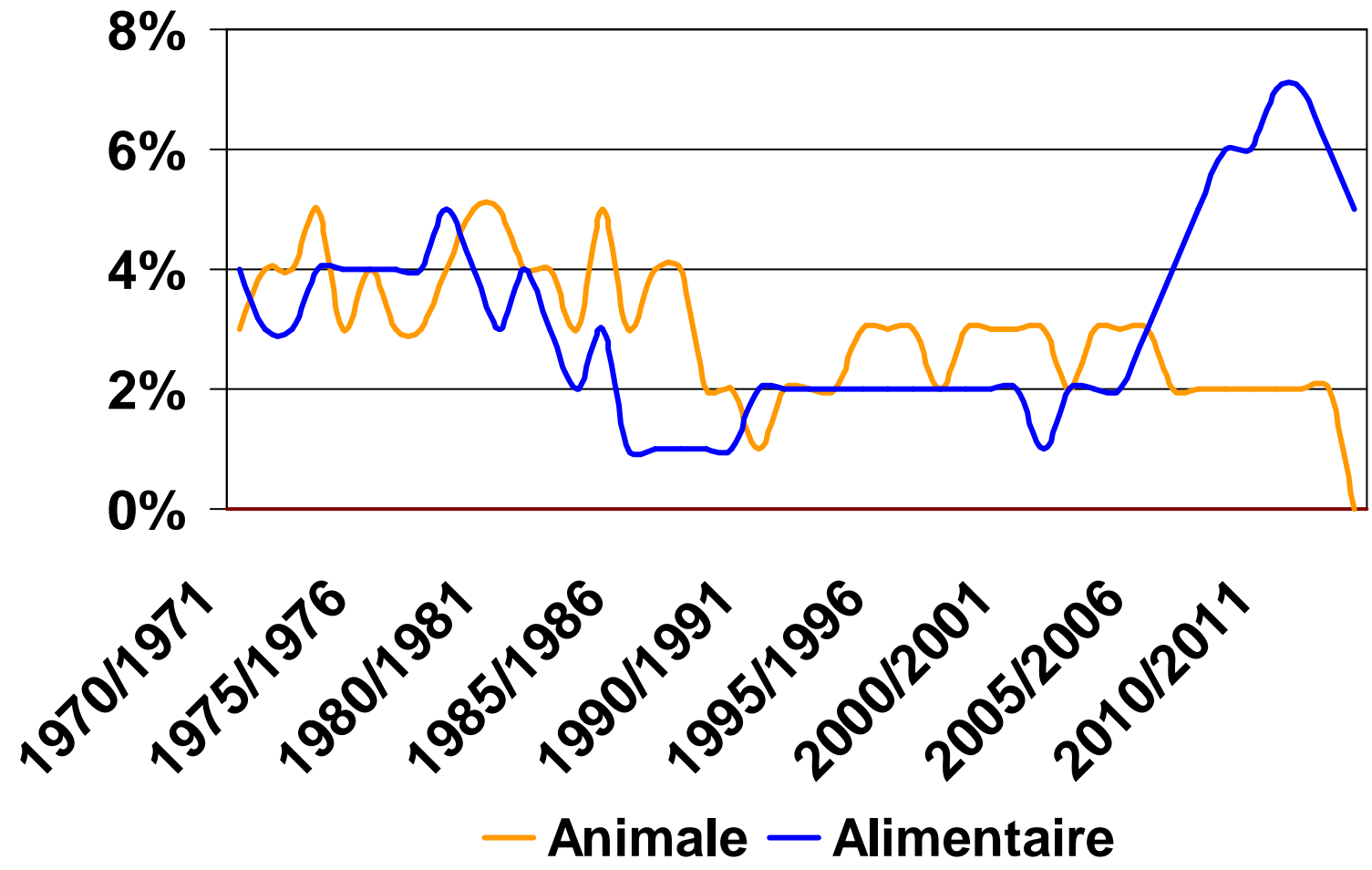


- Argentina Feed Up River — Black Sea Feed — Brazil feed Paranagua
- US 3YC Gulf — Fob Bordeaux

Taux de croissance de la consommation mondiale de blé

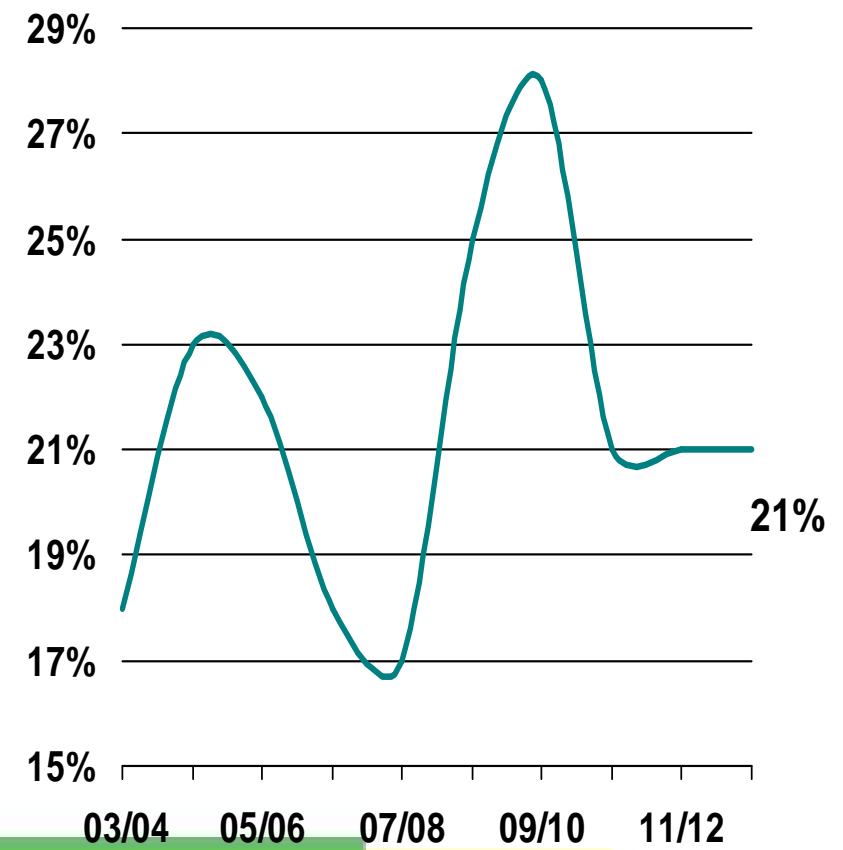
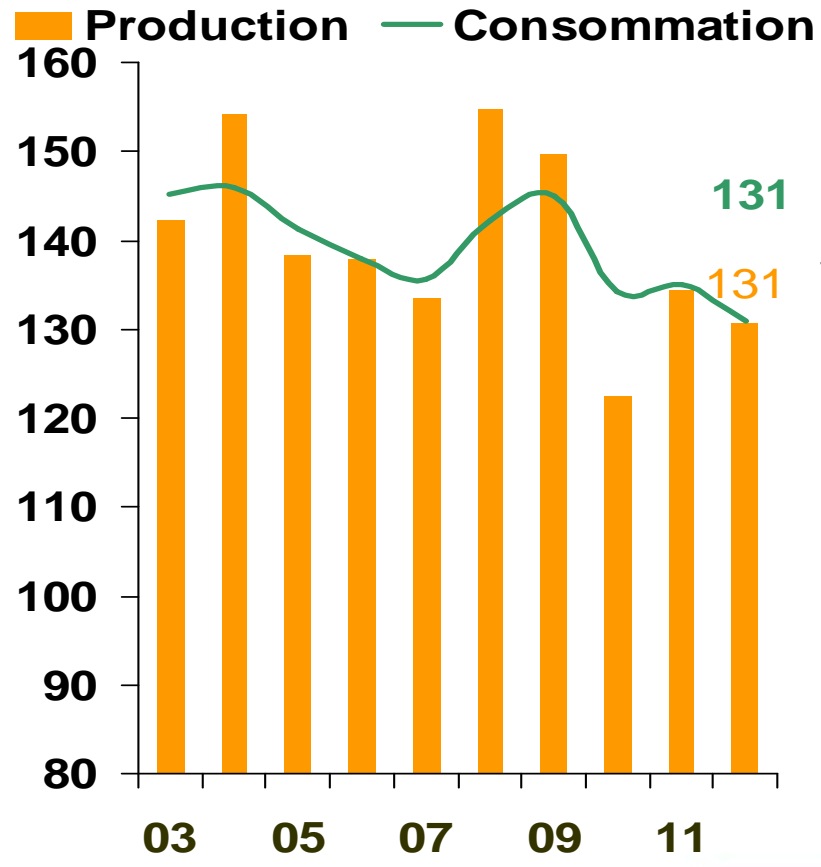


Taux de croissance de la consommation mondiale de maïs



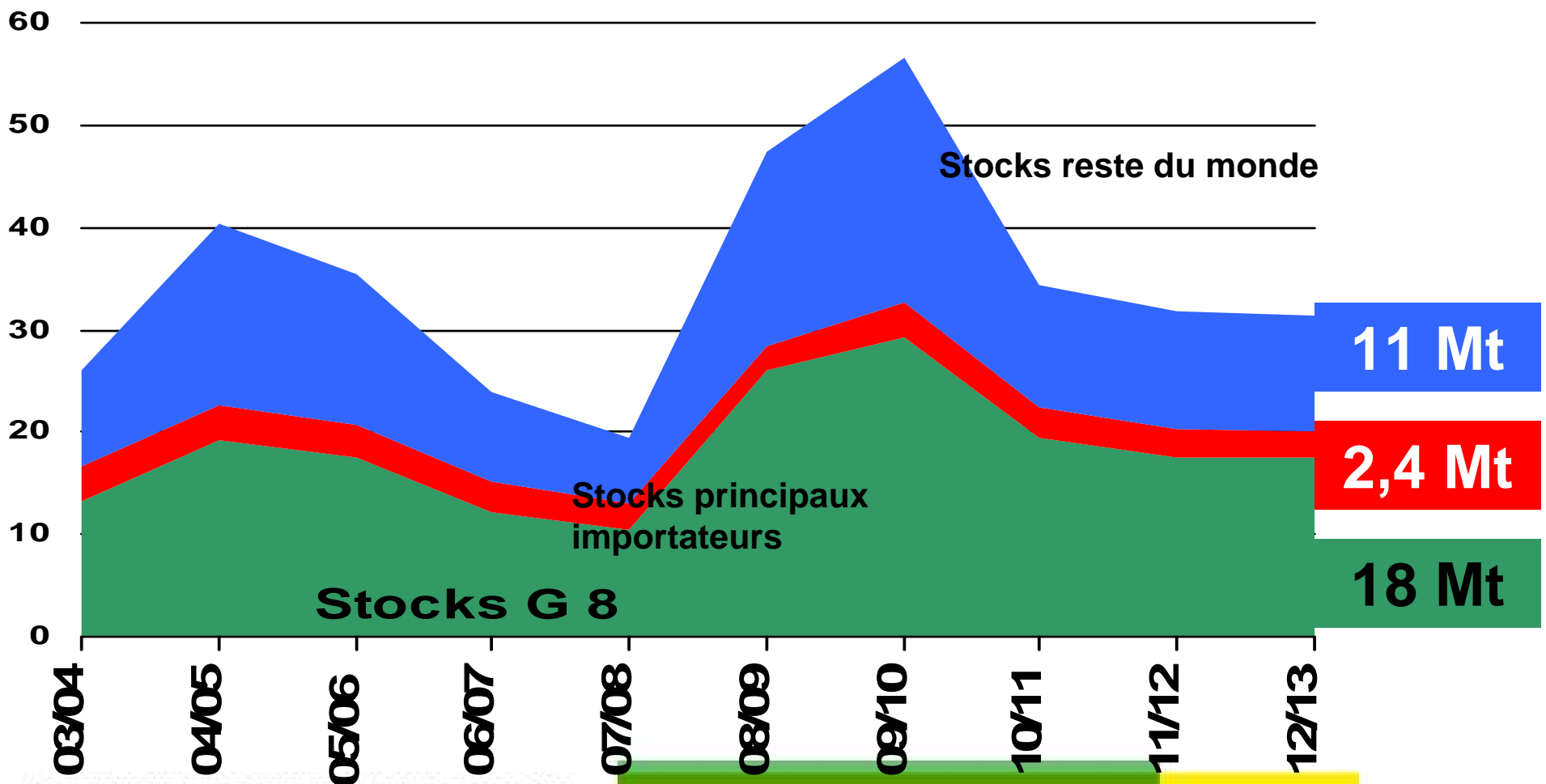
Bilan mondial orge 2012/13

Ratio stock sur consommation

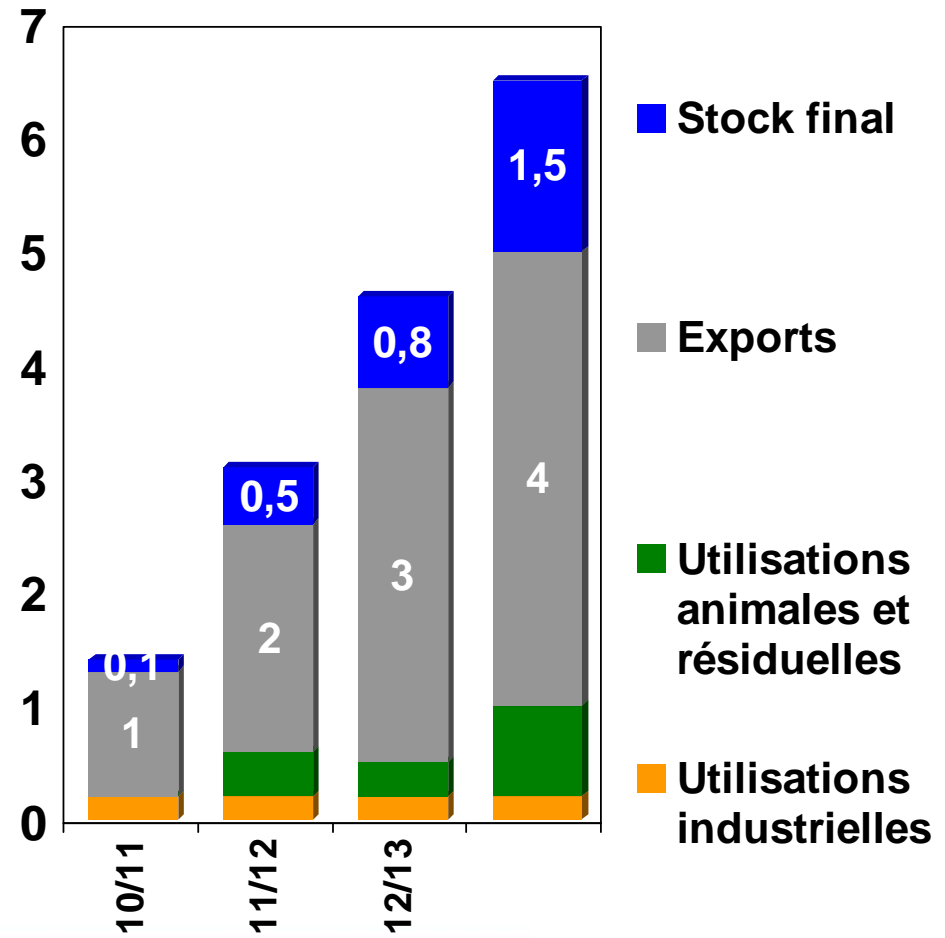
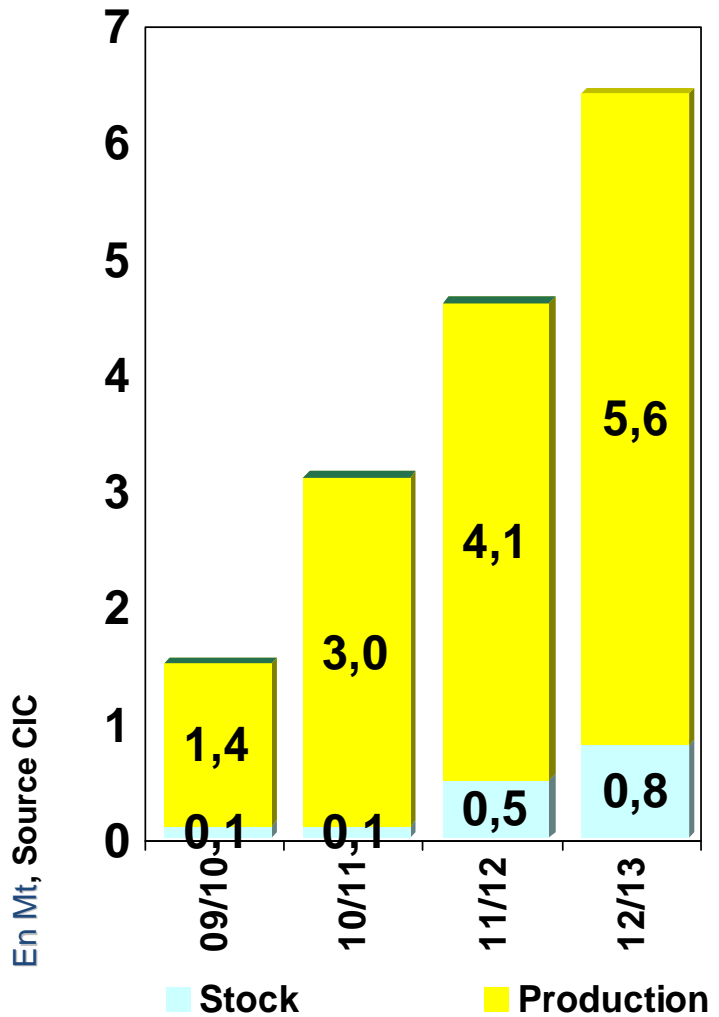


Répartition des stocks mondiaux d'orge en 2012/13

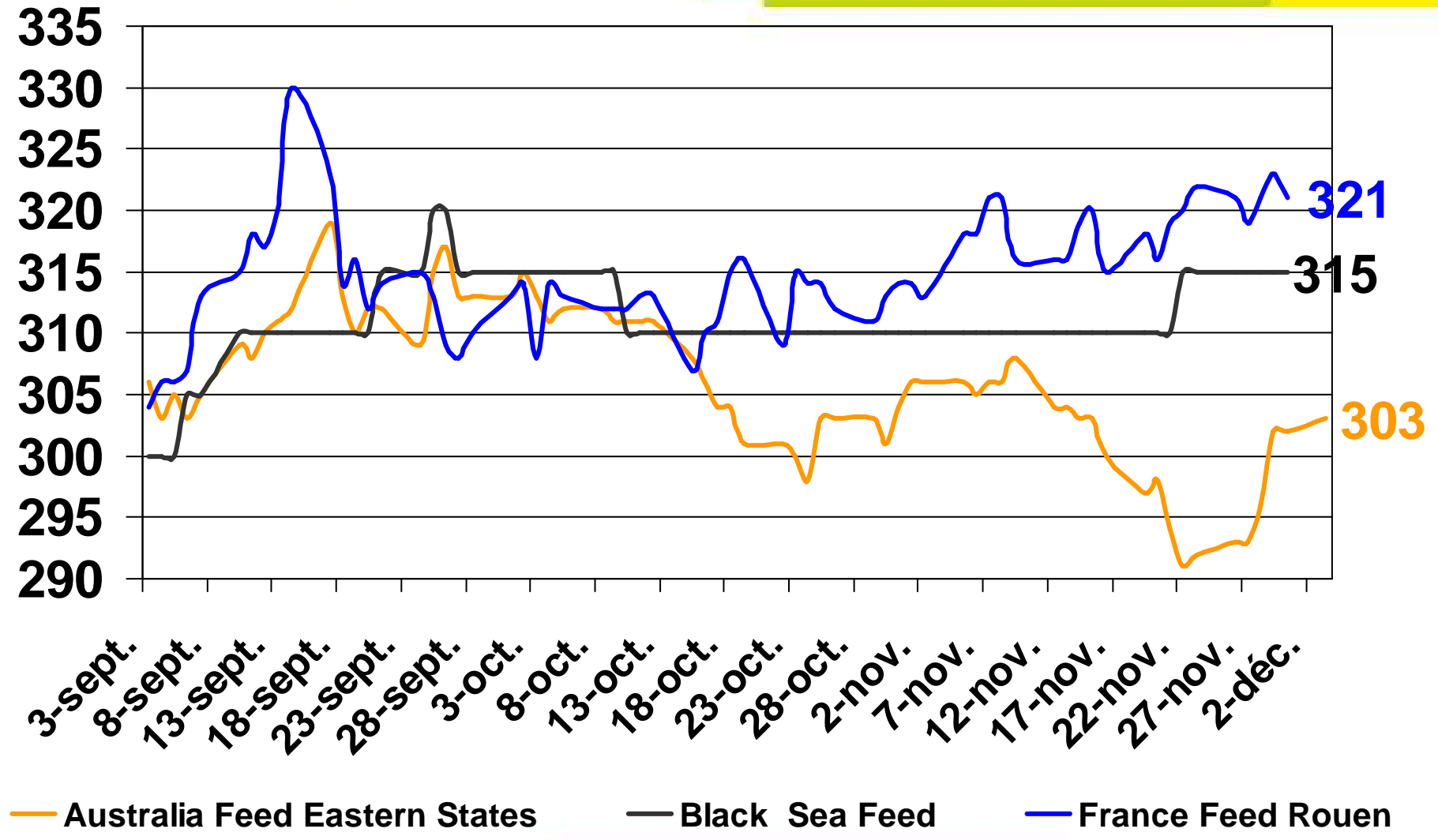
en Mt, Source CIC



Argentine : bilan orge

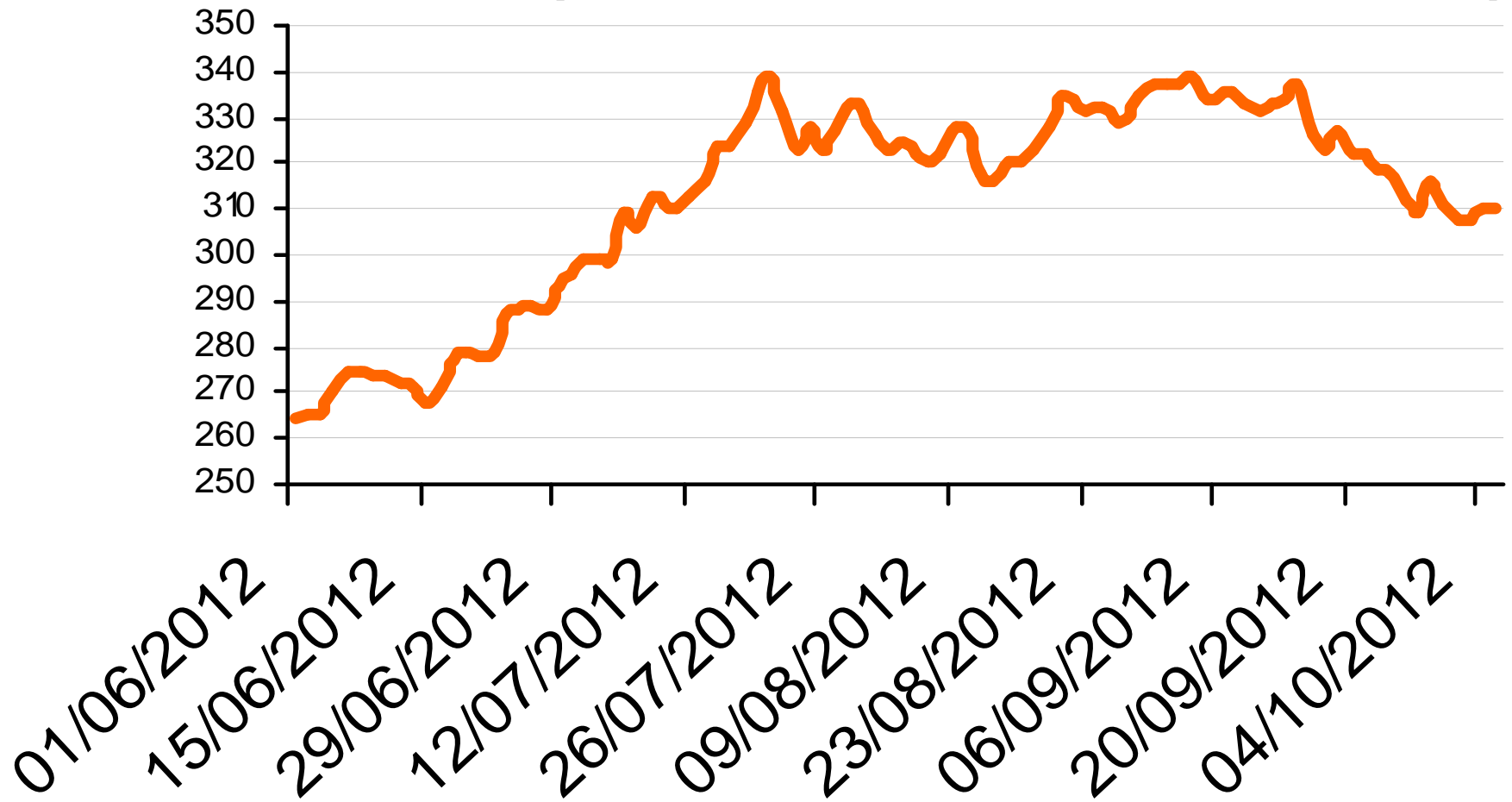


Cours de l'orge



Indice CIC - GOI (Grains and Oilseeds Index)

Source : CIC-indice 100 janvier 2000





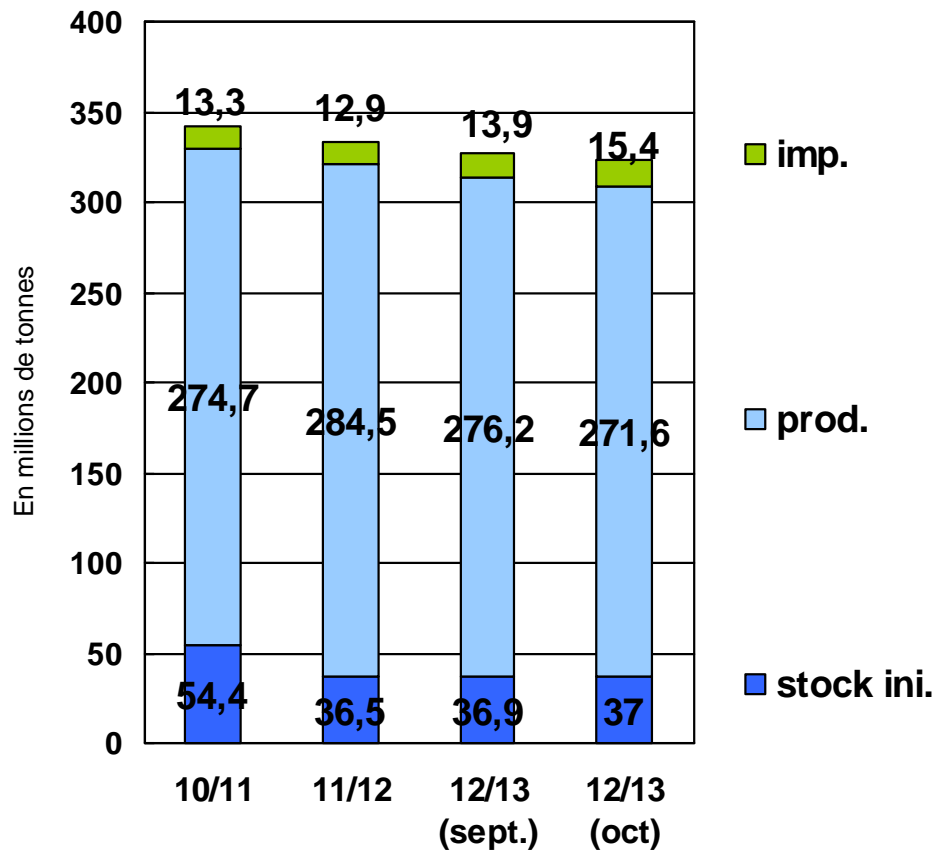
FranceAgriMer



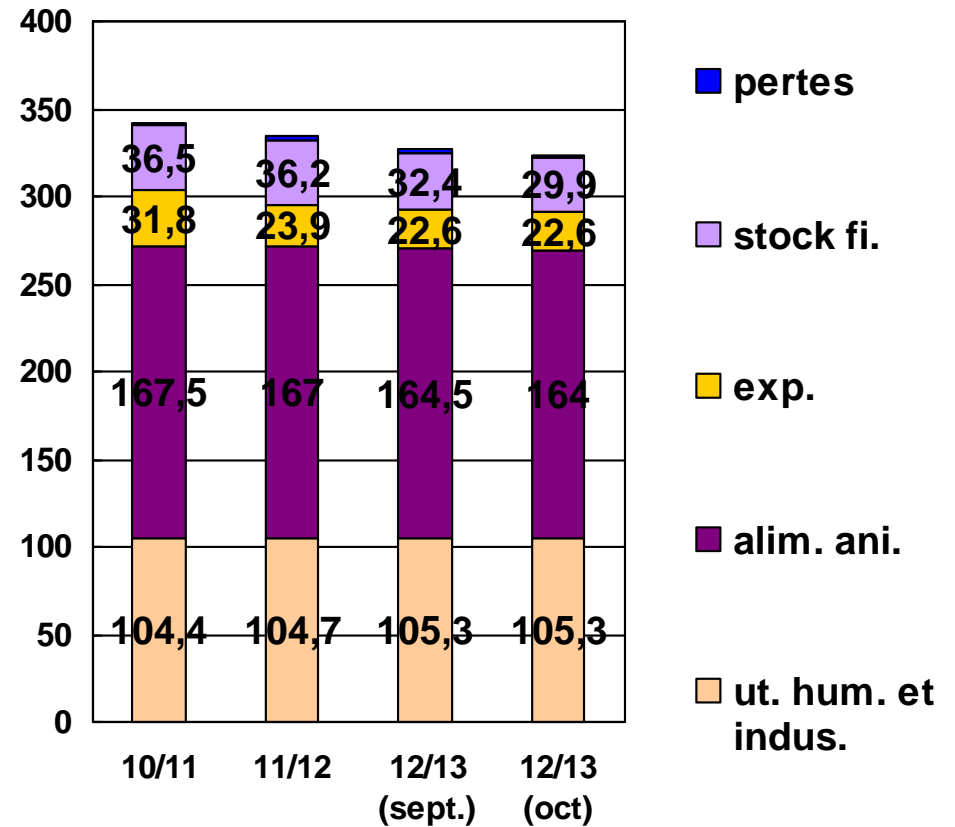
Marché européen

UE - bilan toutes céréales

Total dispo 2012/13 : 324 Mt

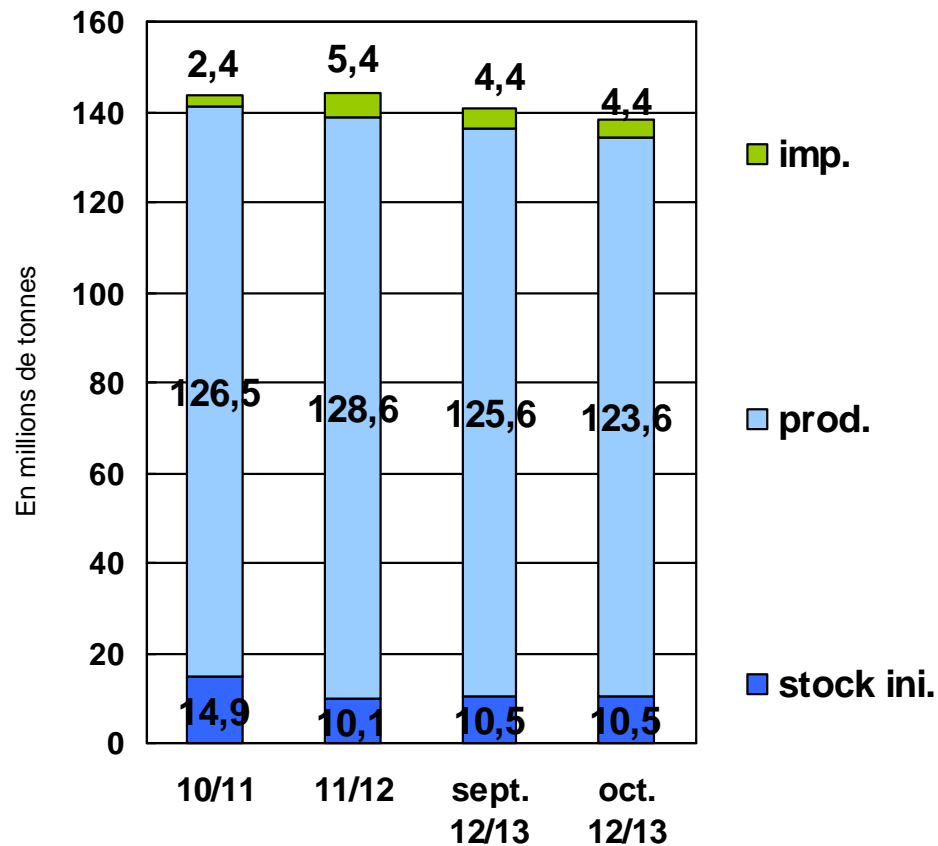


Total utilisation 2012/13 : 324 Mt

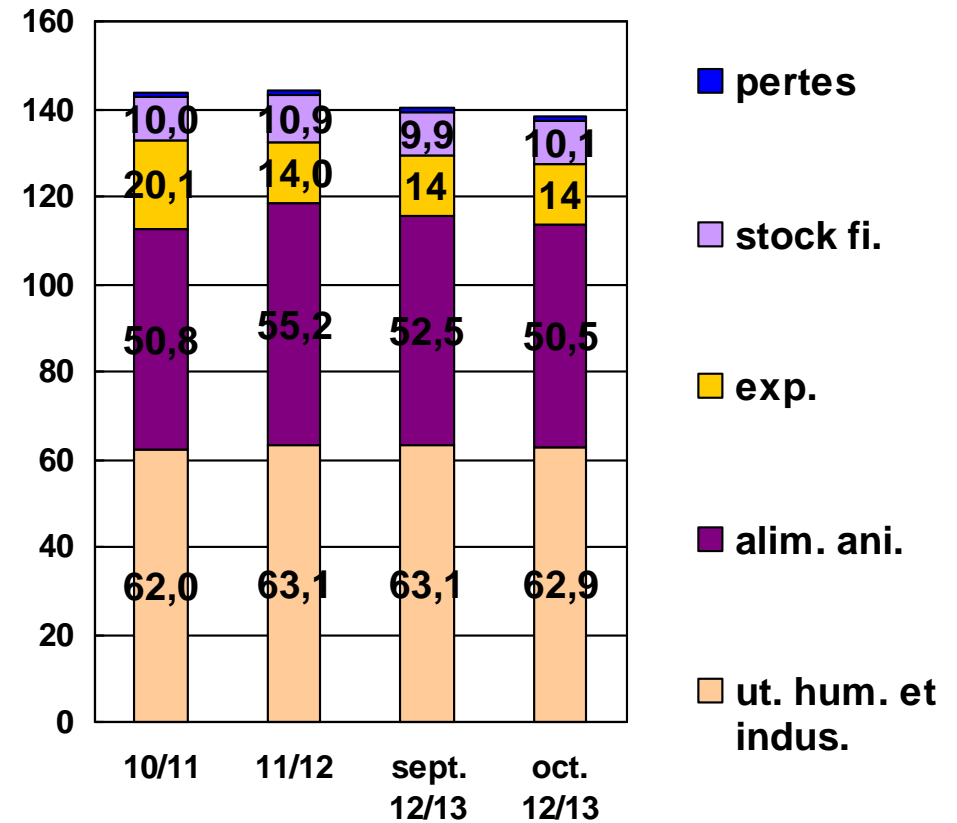


UE - bilan blé tendre

Total dispo 2012/13 : 138,5 Mt

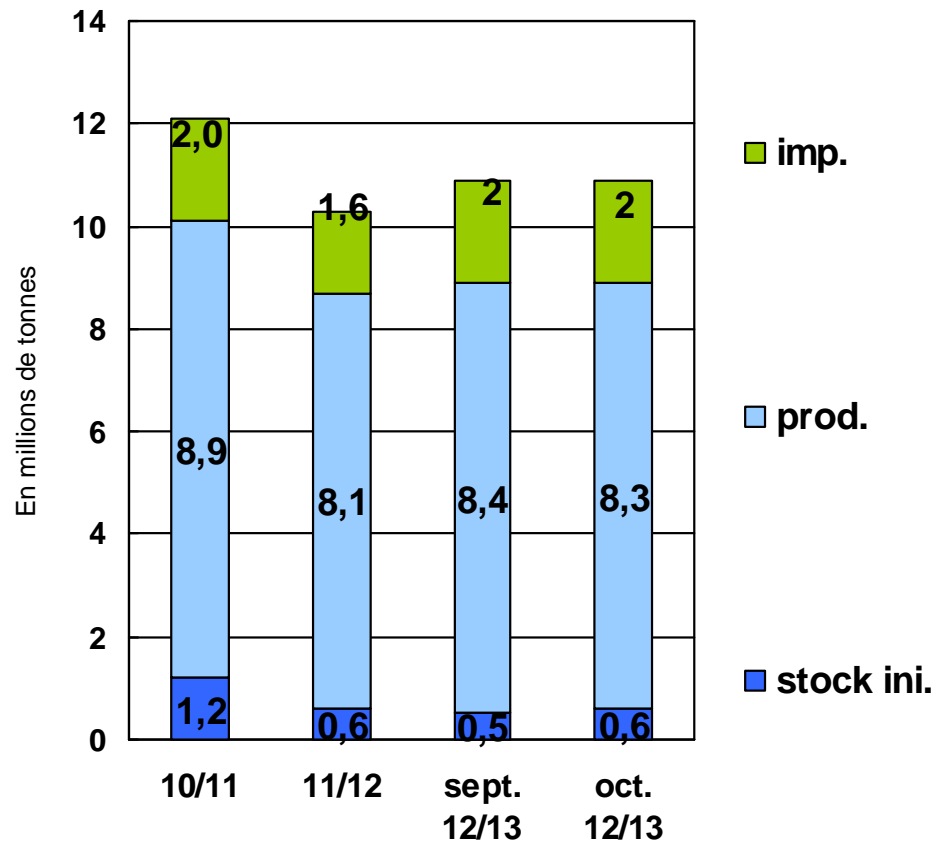


Total utilisation 2012/13 : 138,5 Mt

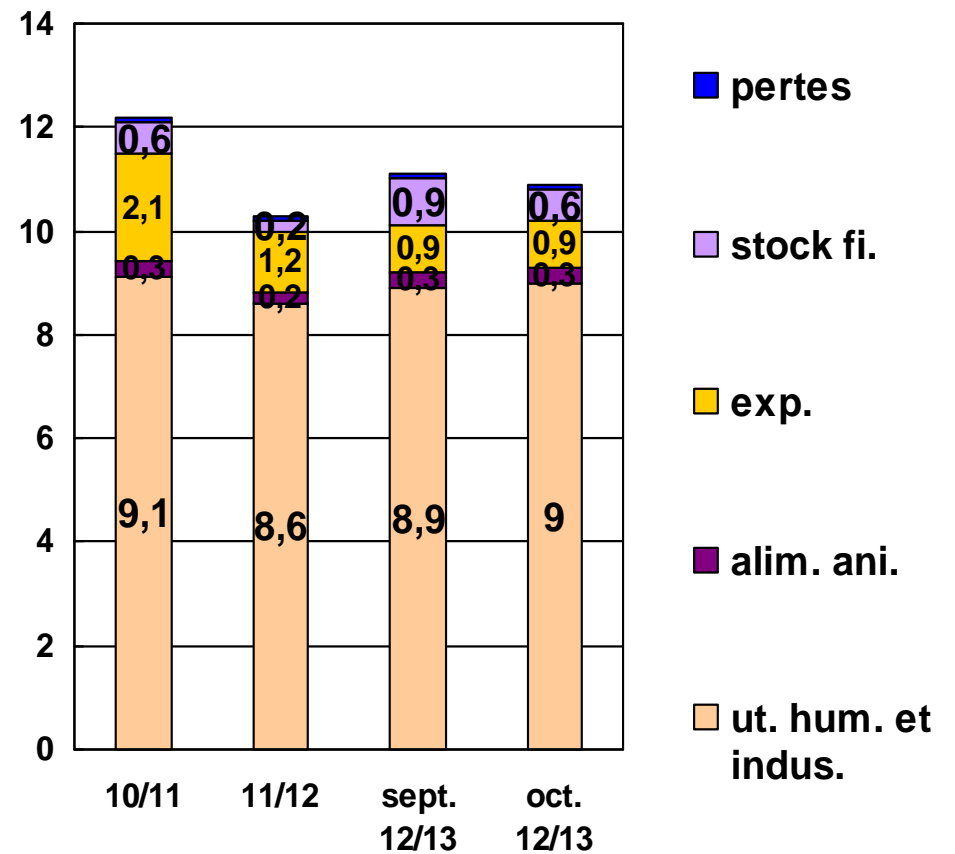


UE - bilan blé dur

Total dispo 2012/13 : 10,9 Mt



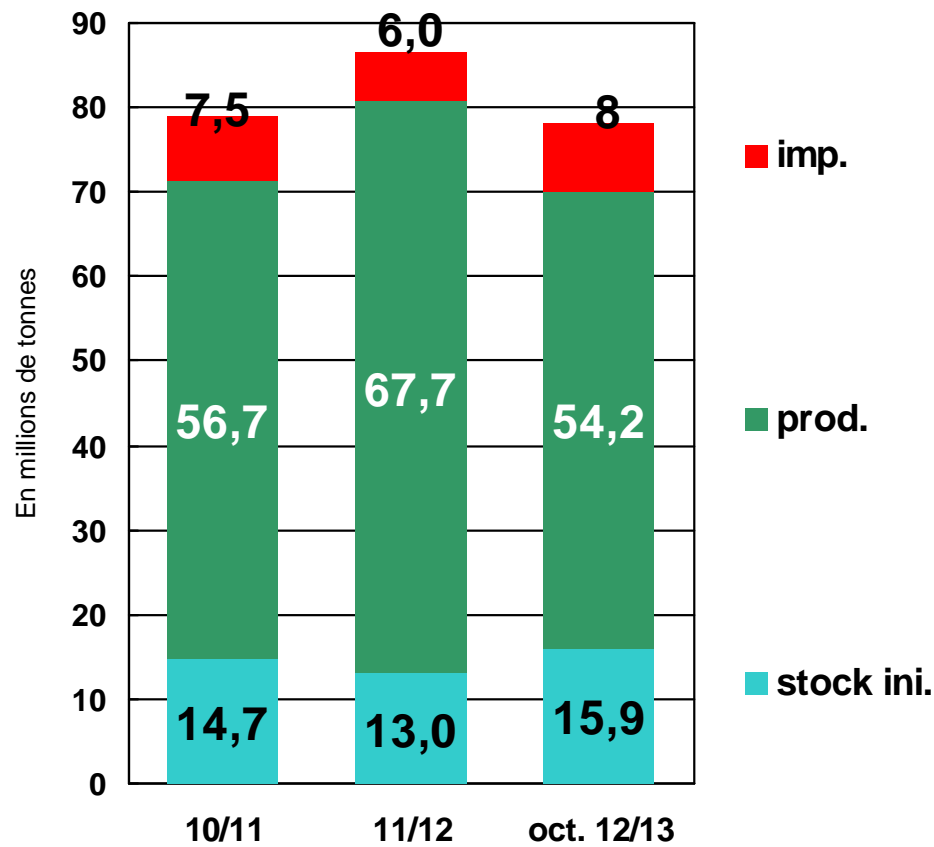
Total utilisation 2012/13 : 10,9 Mt



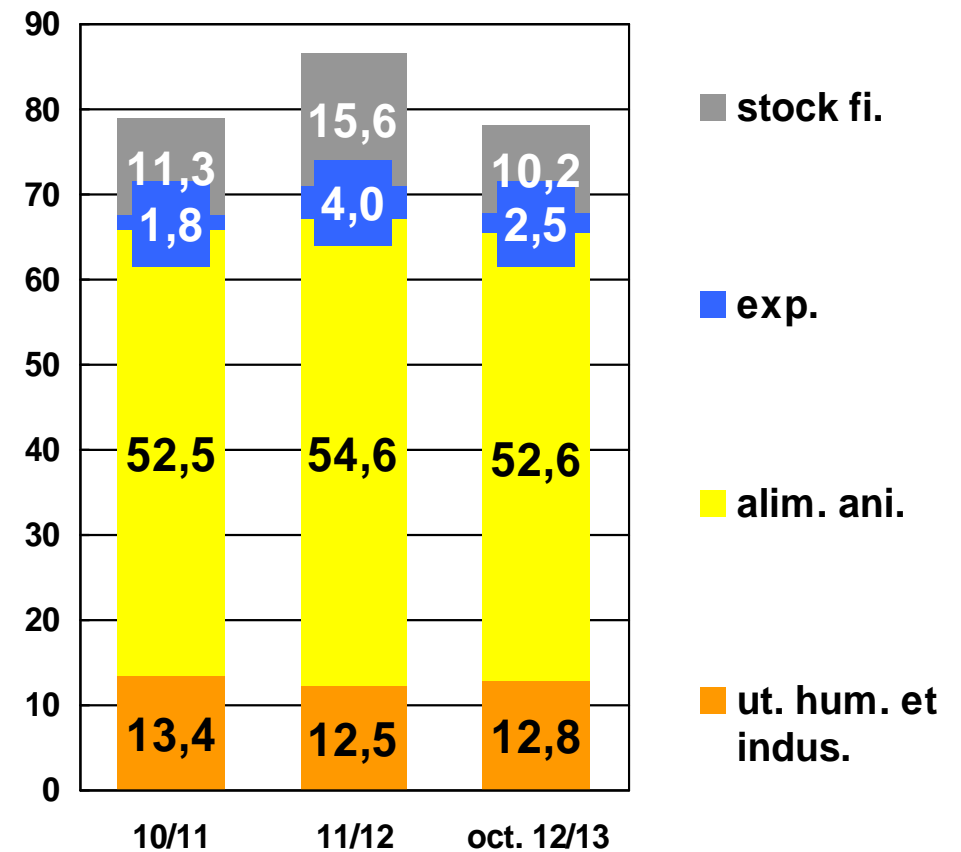
UE - bilan maïs



Total dispo 2012/13 : 78,1 Mt

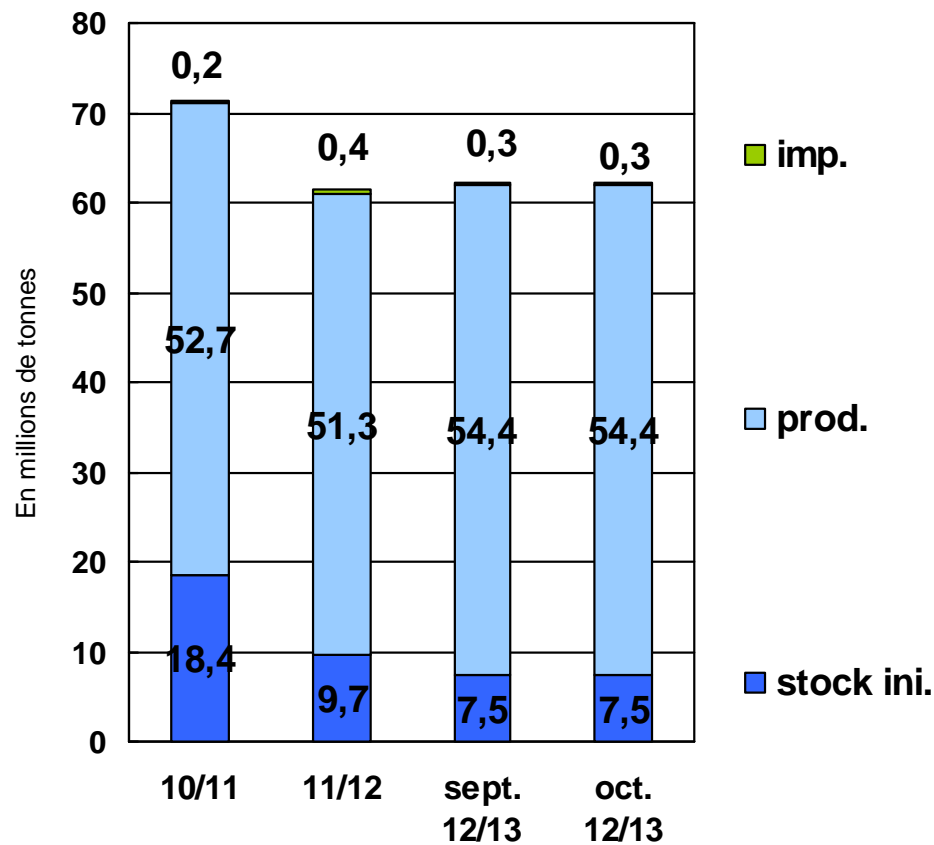


Total utilisation 2012/13 : 78,1 Mt

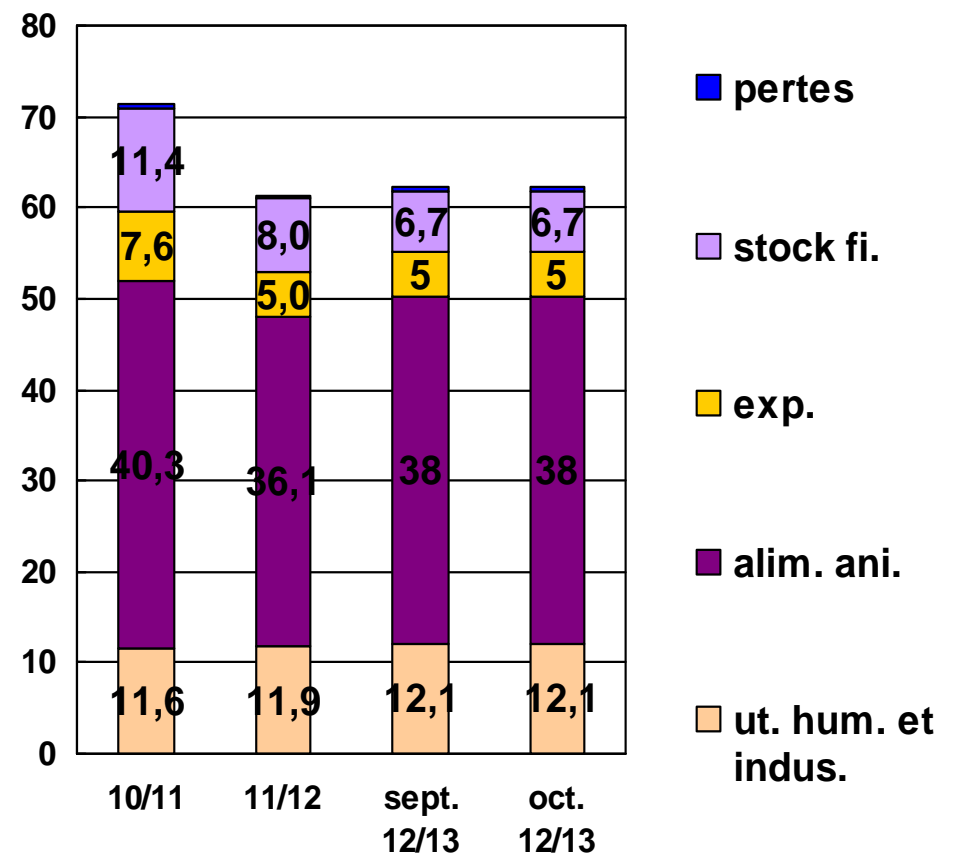


UE - bilan orge

Total dispo 2012/13 : 62,1 Mt

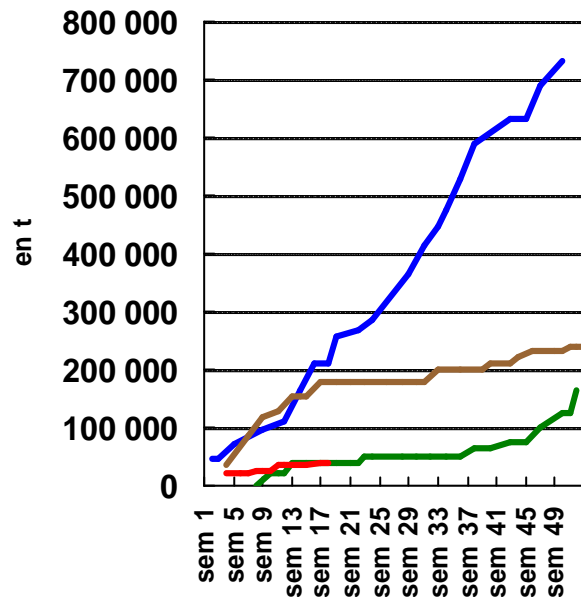


Total utilisation 2012/13 : 62,1 Mt

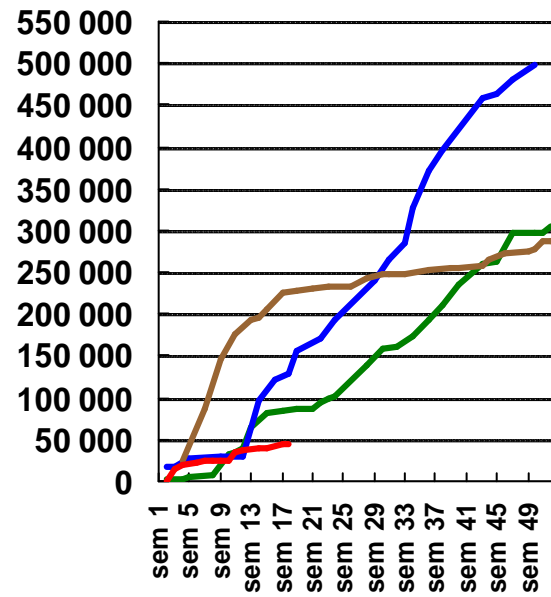


IMPORTATIONS DE "PRODUITS DE SUBSTITUTION DES CEREALES" (PSC) Certificats délivrés, en cumul depuis le début de campagne

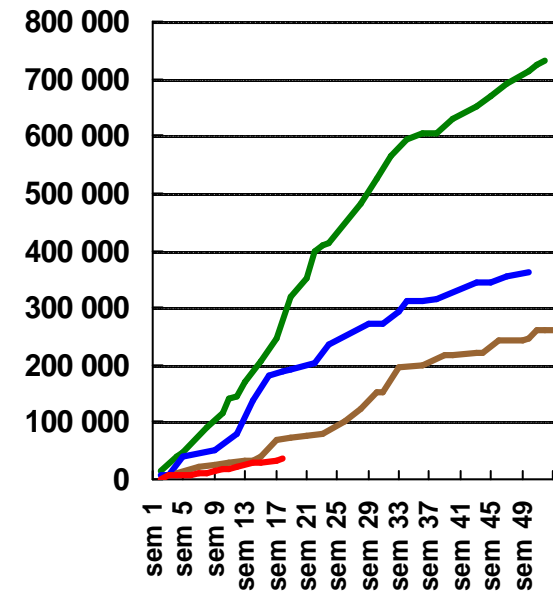
Corn gluten feed



Drèches de brasserie

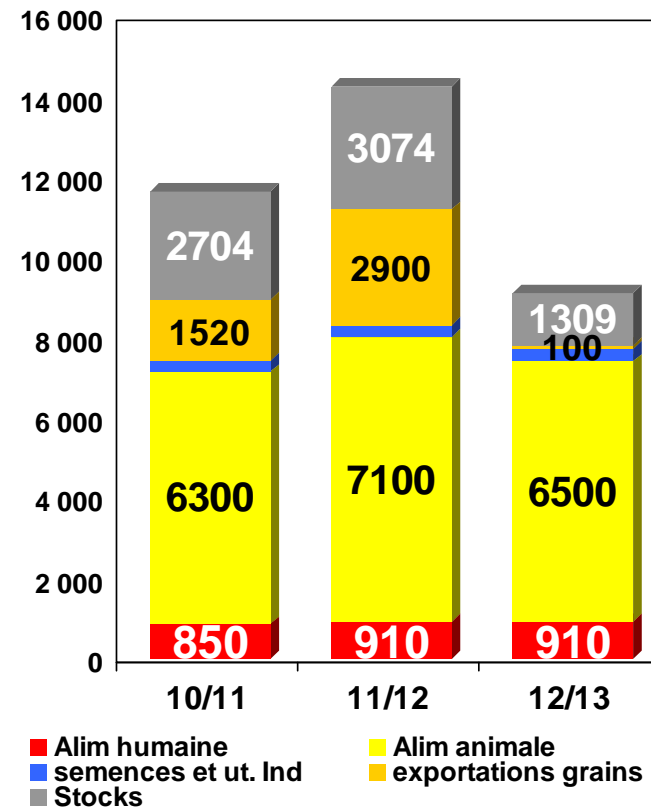
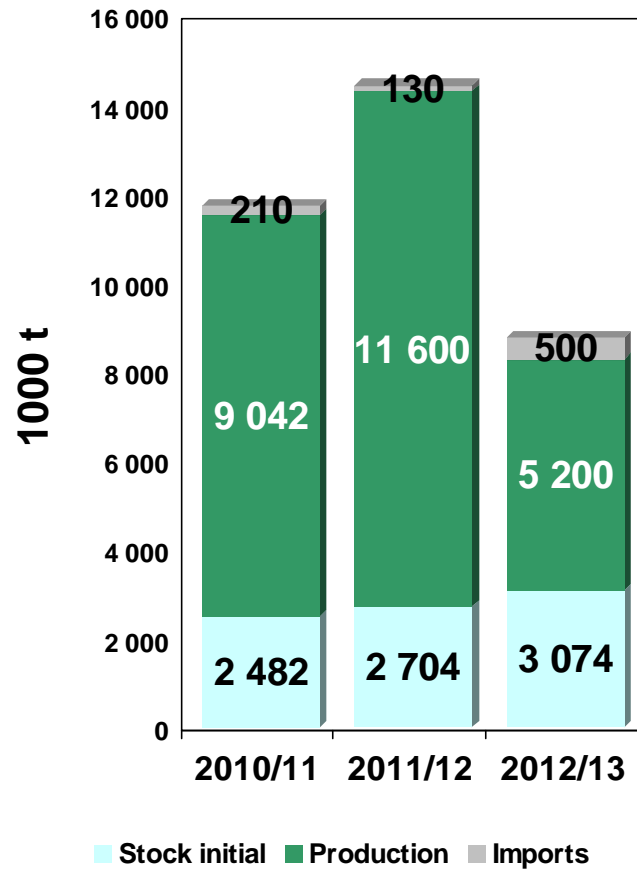


Pulpes d'agrumes

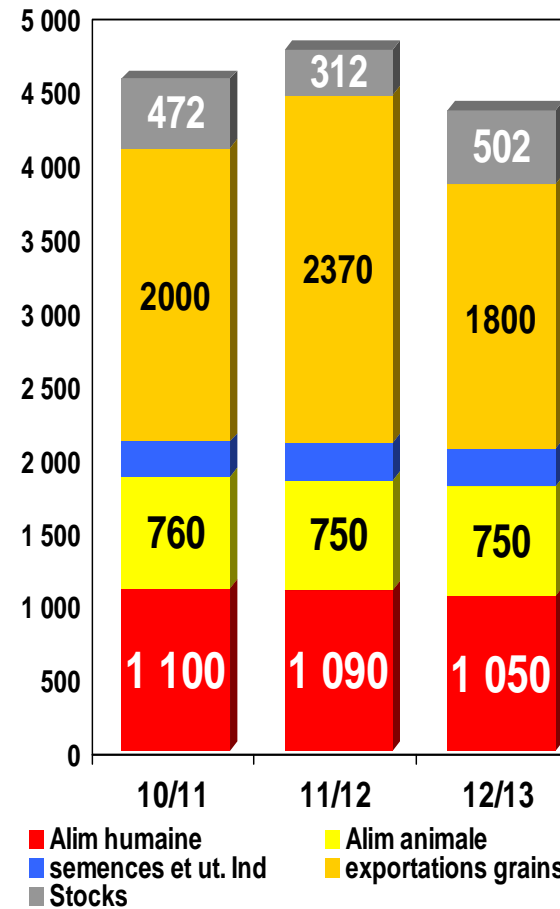
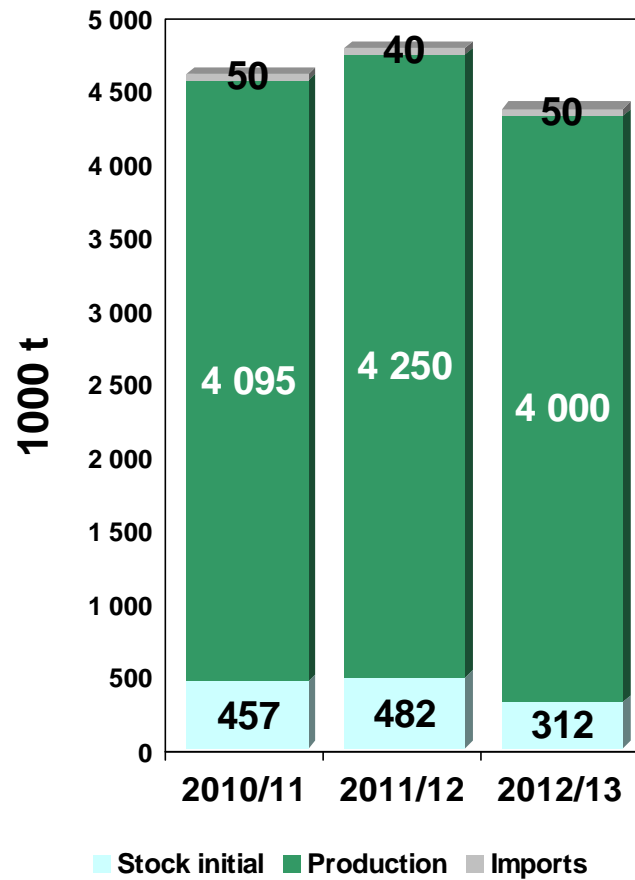


— 2009/10 — 2010/11
— 2011/12 — 2012/13

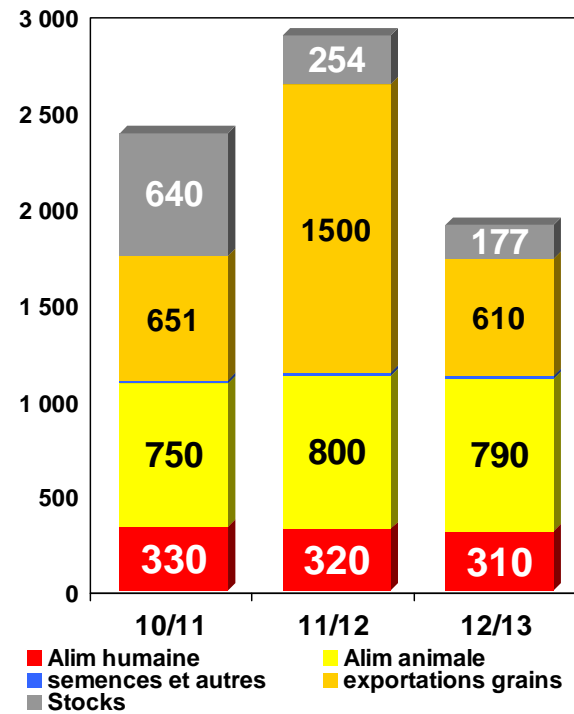
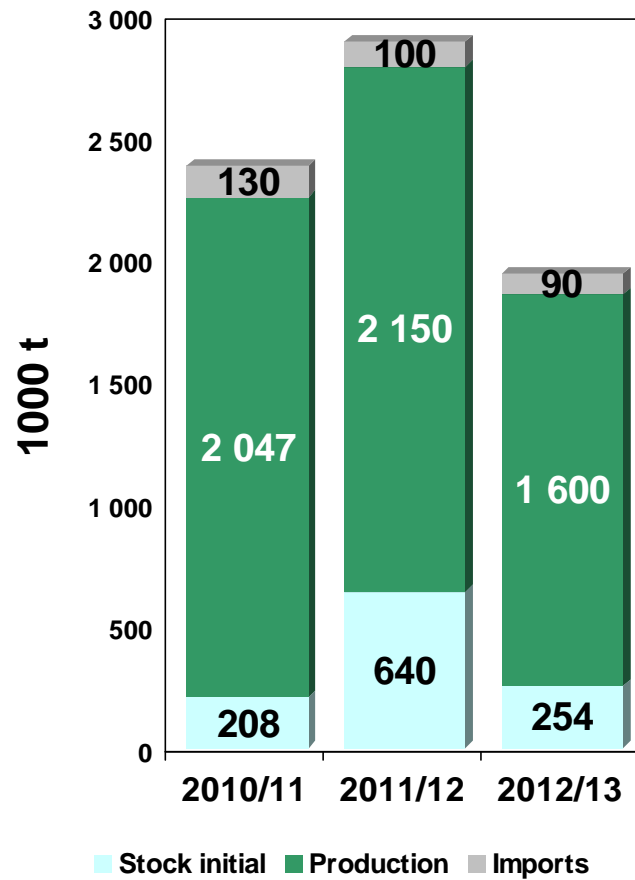
ROUMANIE : Bilan maïs



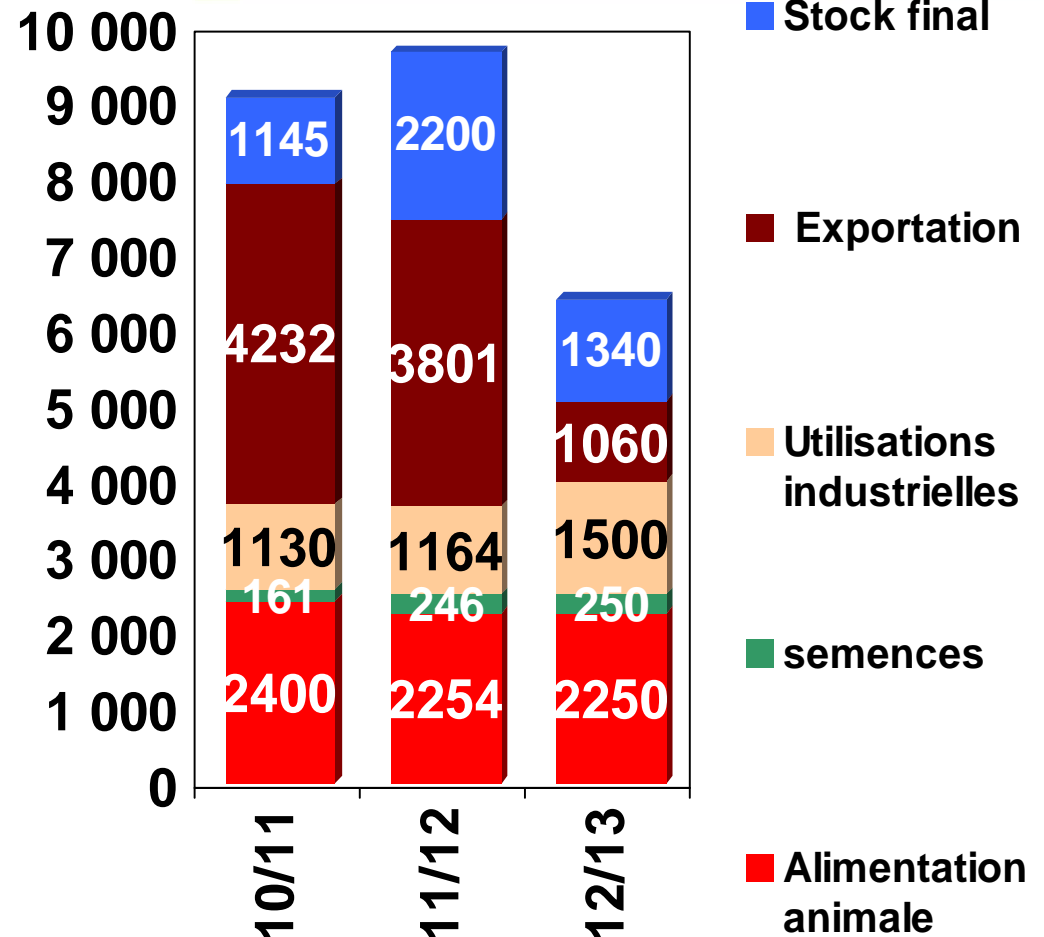
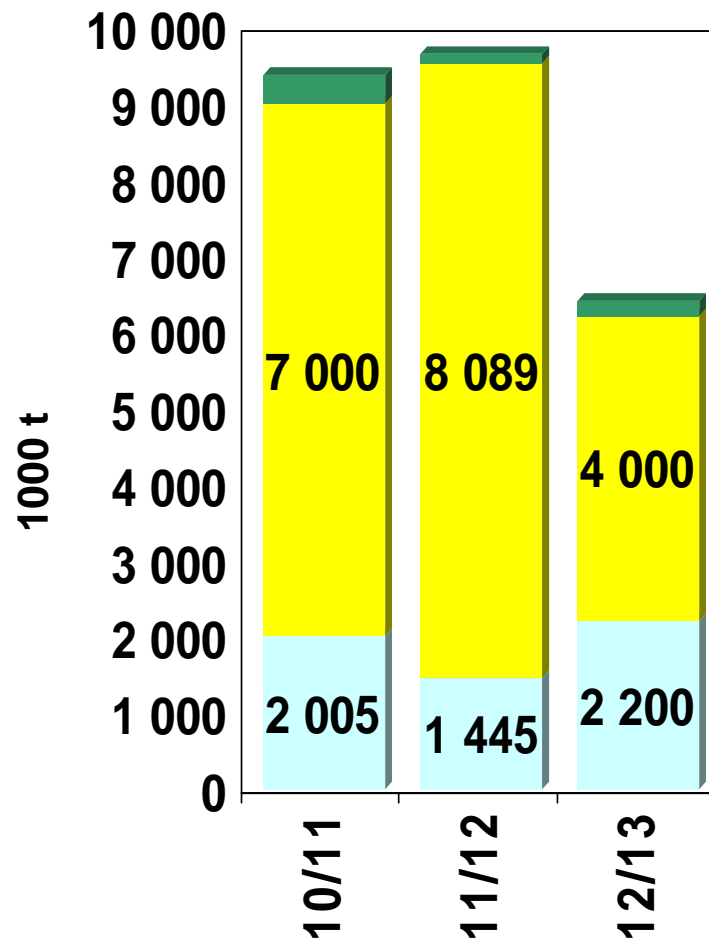
BULGARIE : bilan blé tendre



BULGARIE : bilan maïs

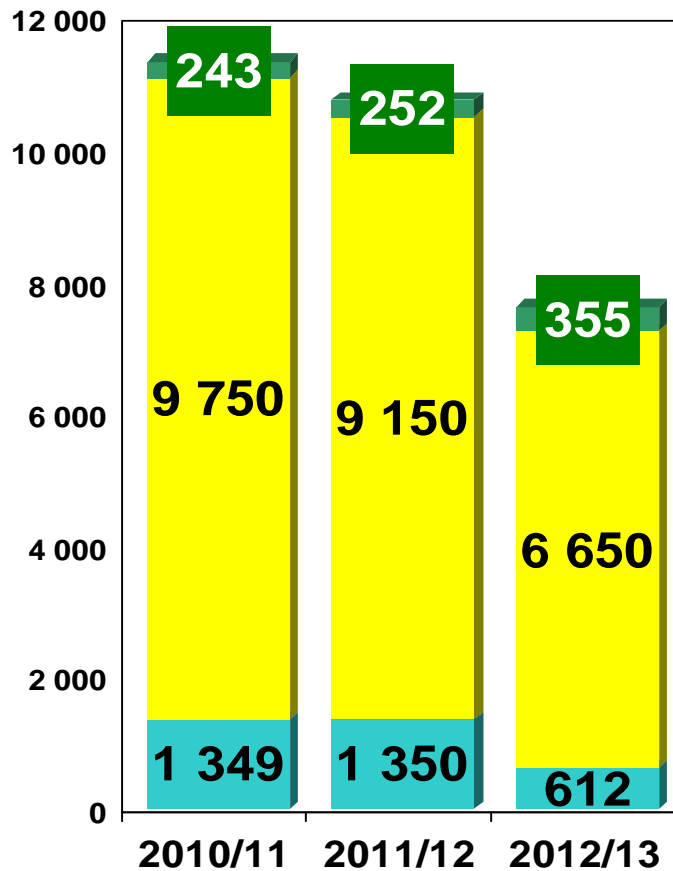


Hongrie, bilan maïs

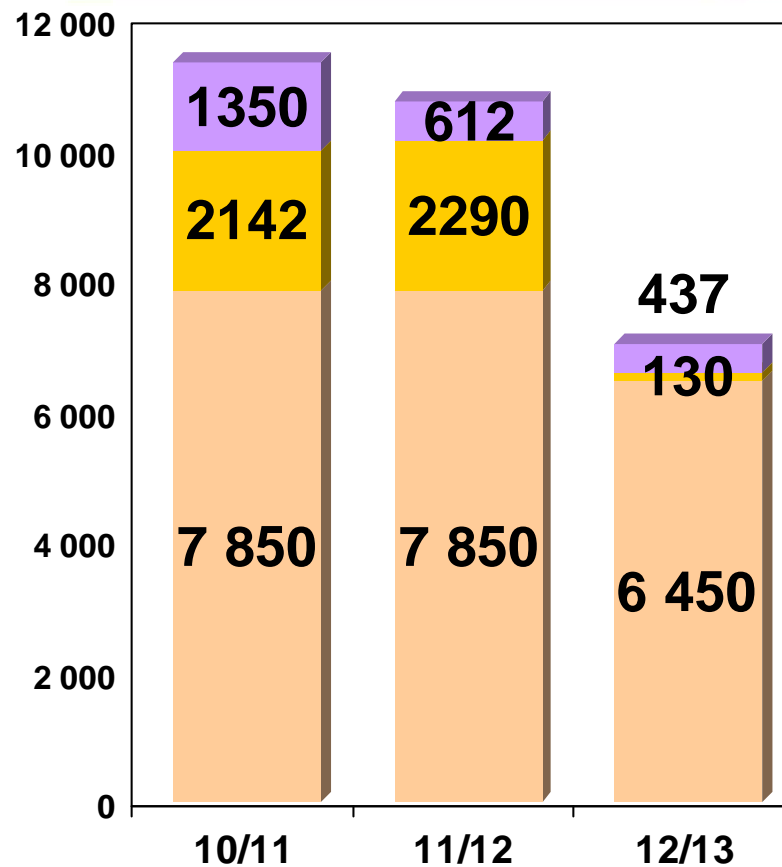


Stock Production

Bilan Maïs Balkans occidentaux



■ Stock initial ■ Production ■ Imports

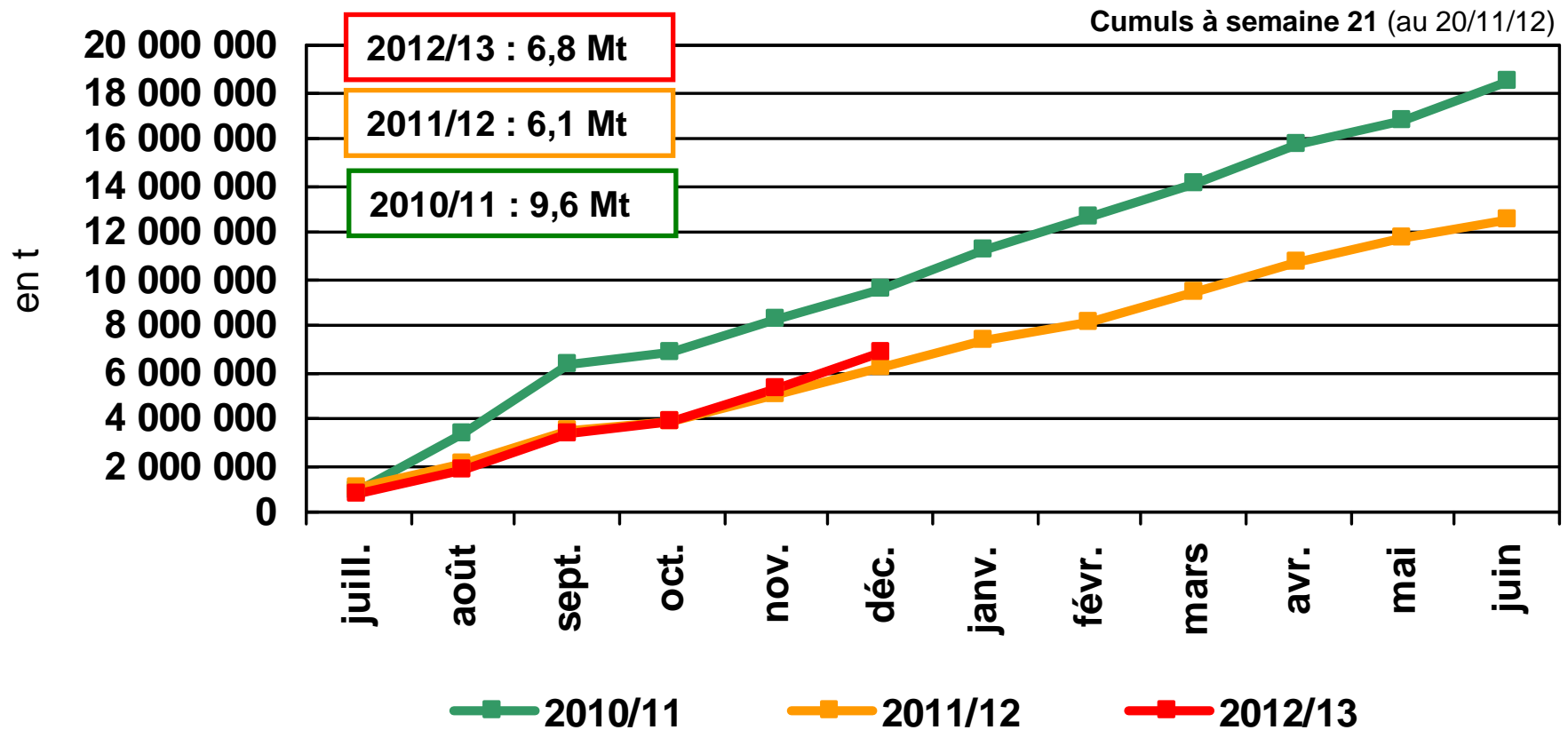


■ Conso intérieure ■ exportations grains ■ Stocks

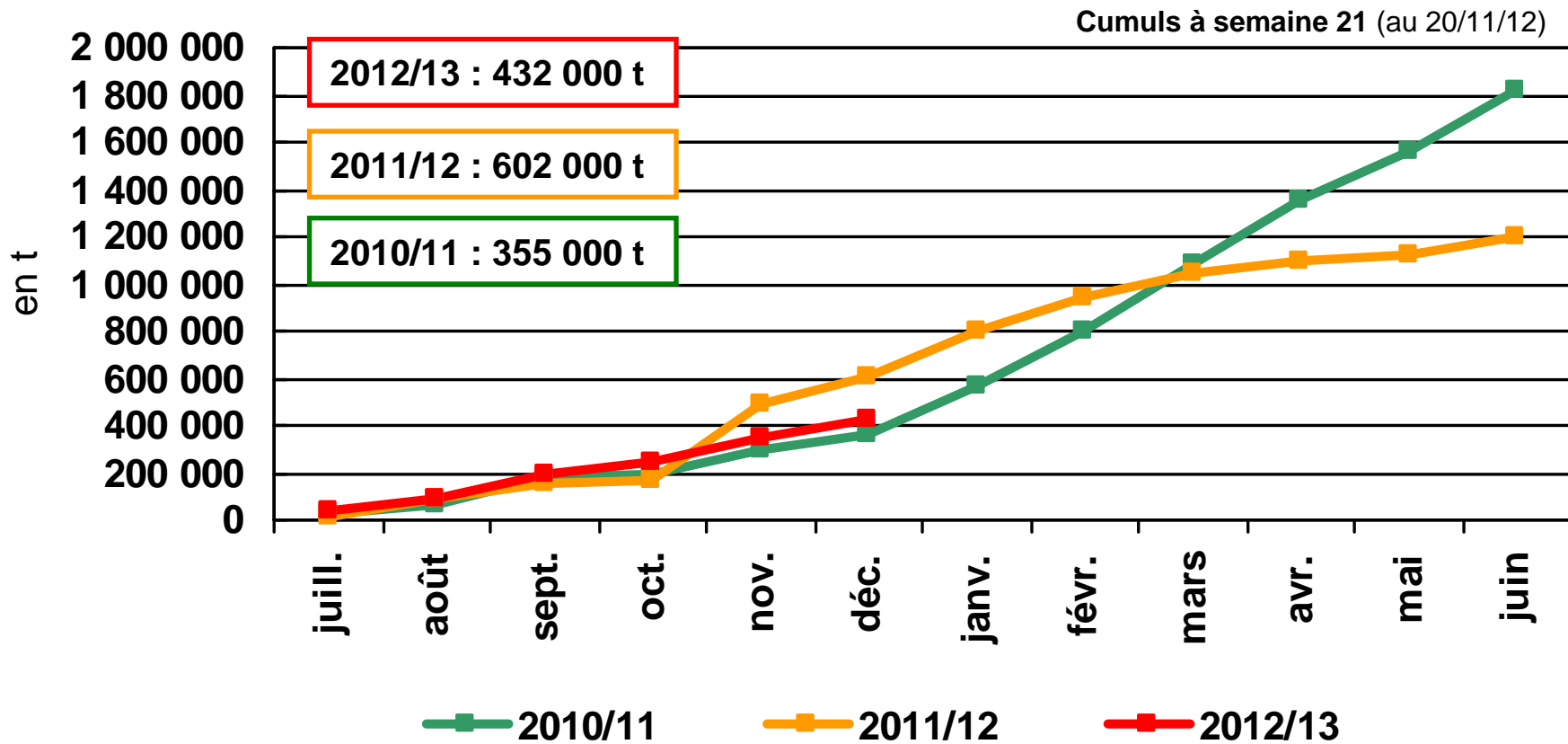
Production de maïs de l'Europe danubienne

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%

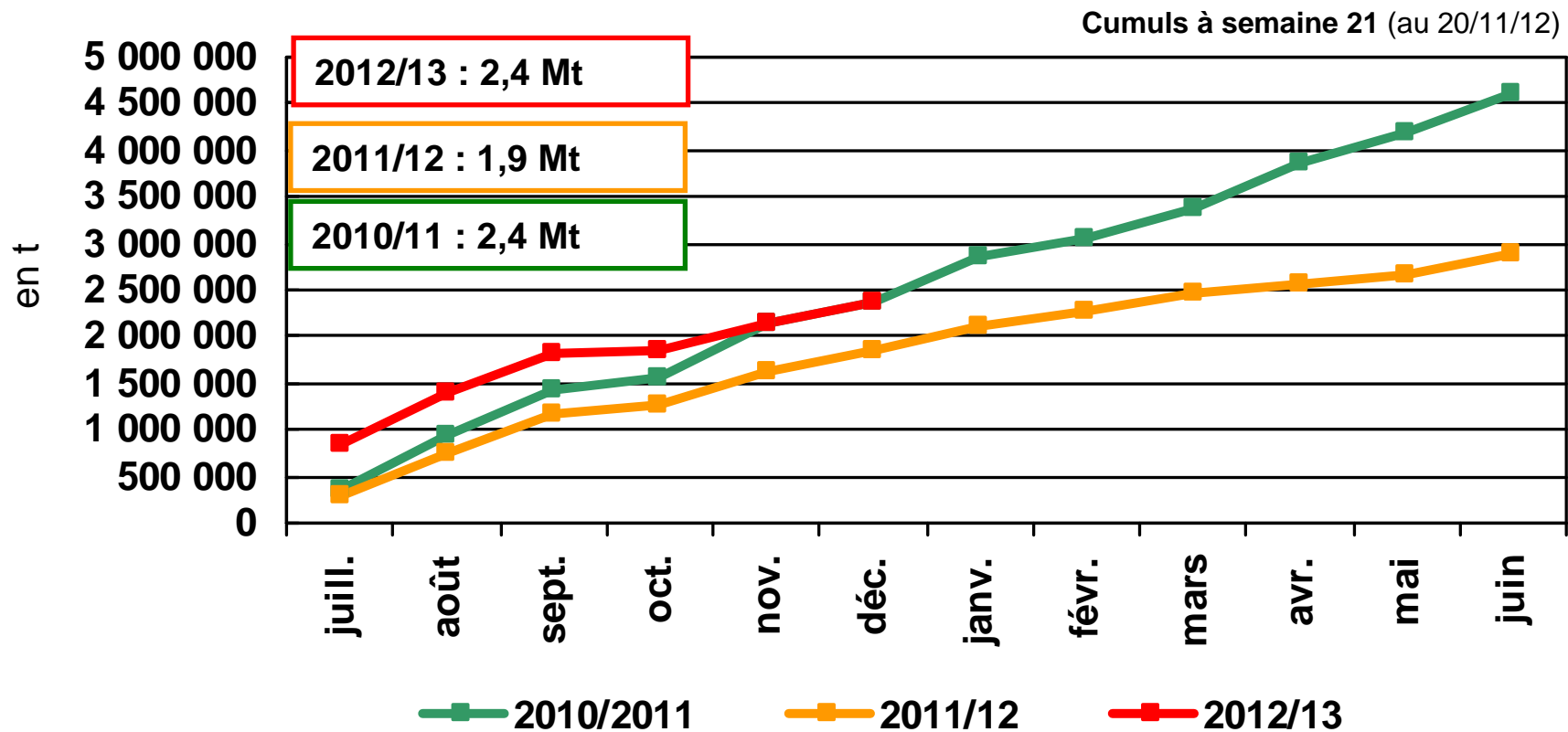
Blé tendre : certificats à l'exportation délivrés dans l'UE



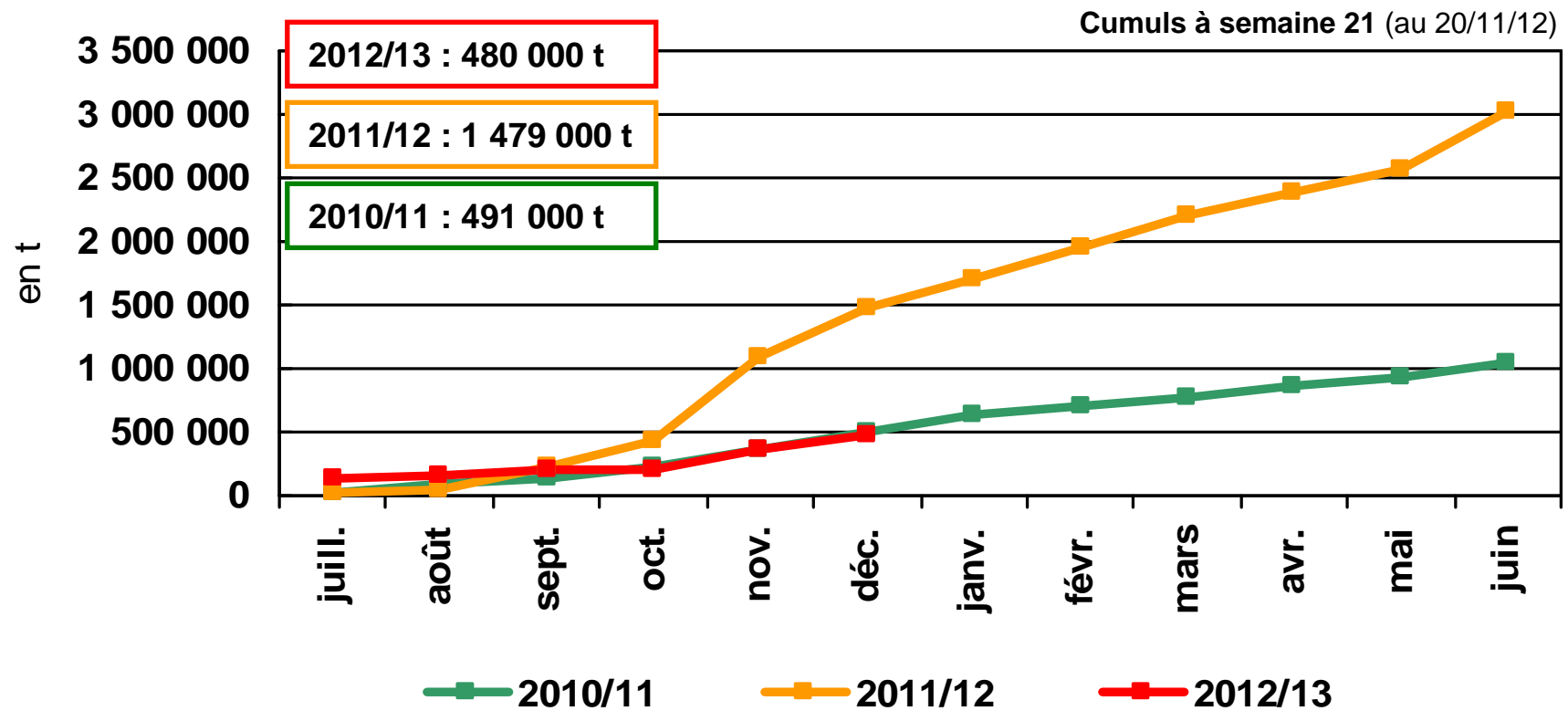
Blé dur : certificats à l'exportation délivrés dans l'UE



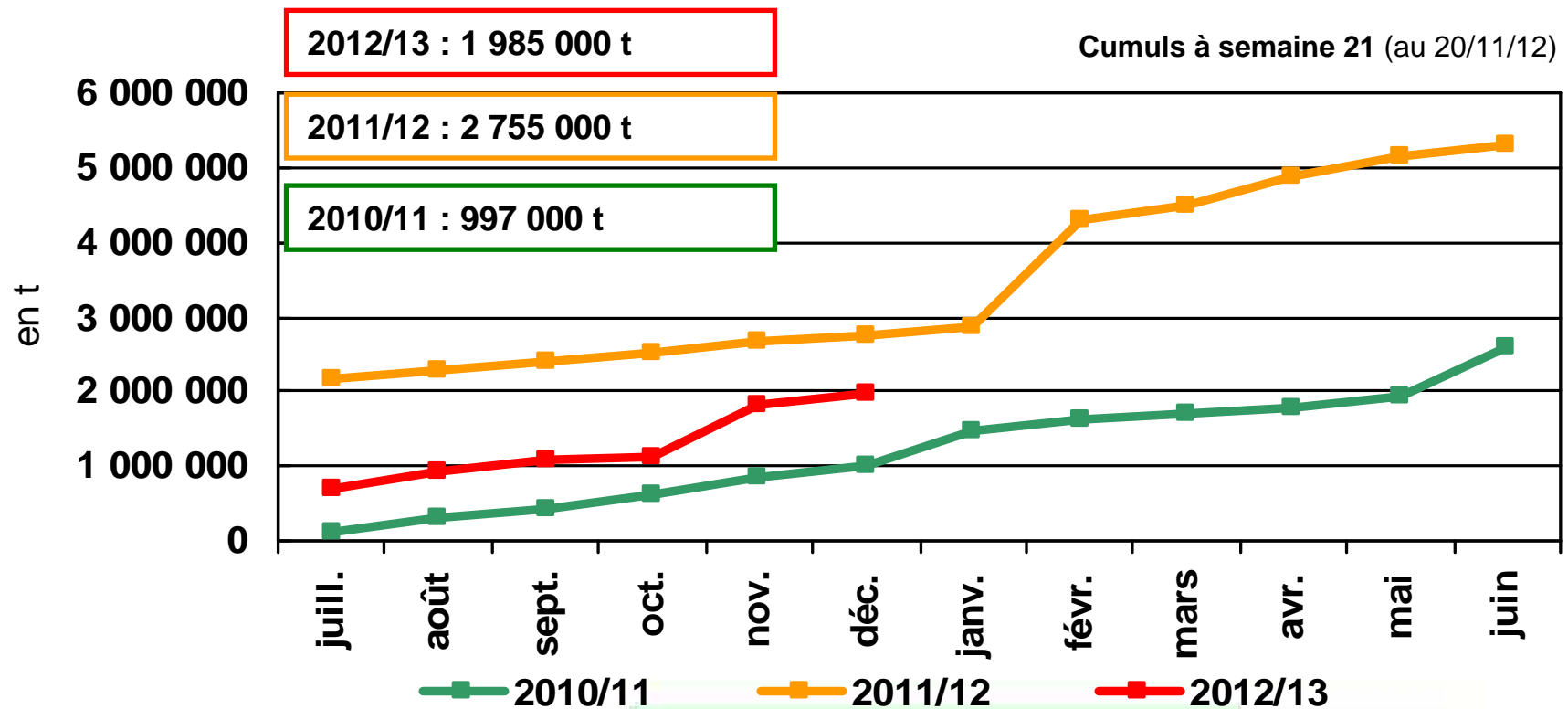
Orge : certificats à l'exportation délivrés dans l'UE



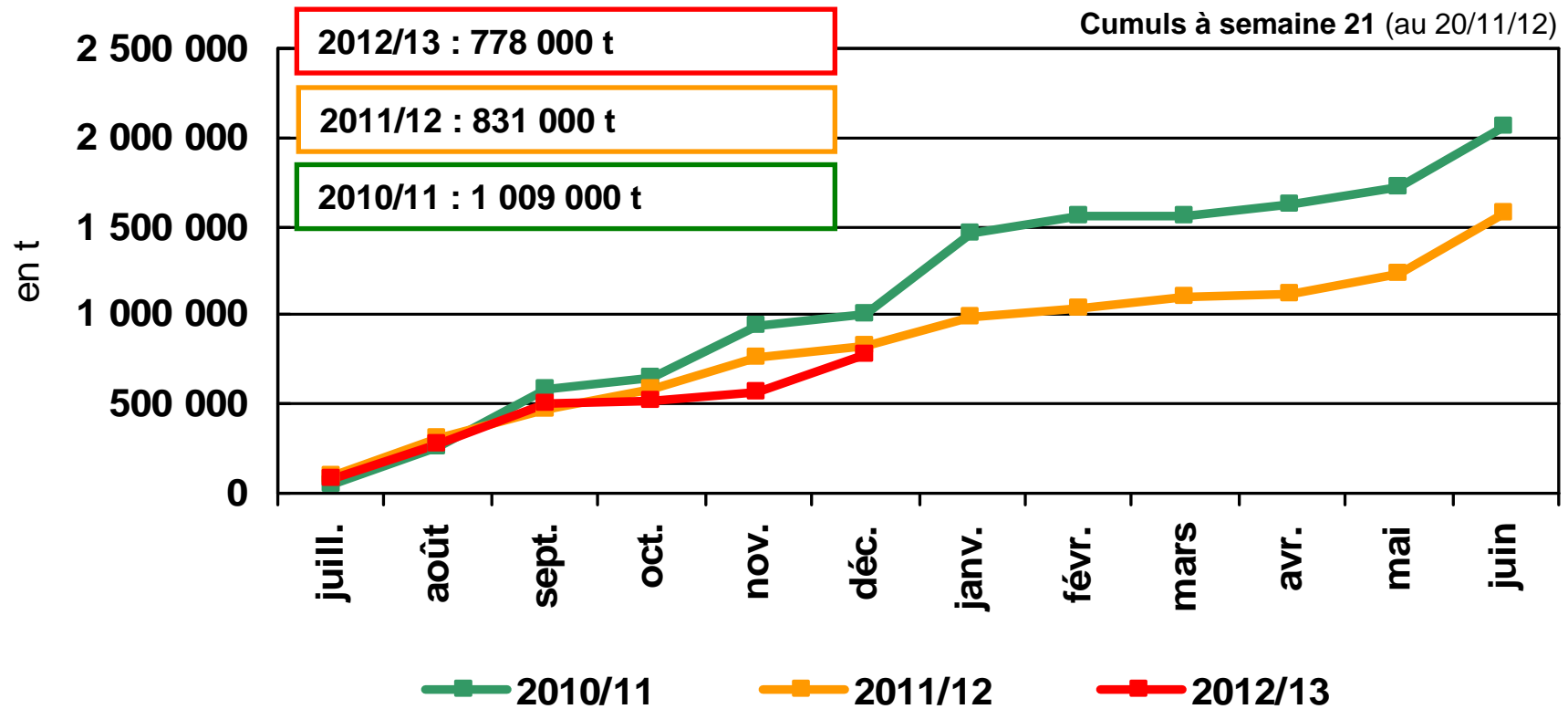
Mais : certificats à l'exportation délivrés dans l'UE



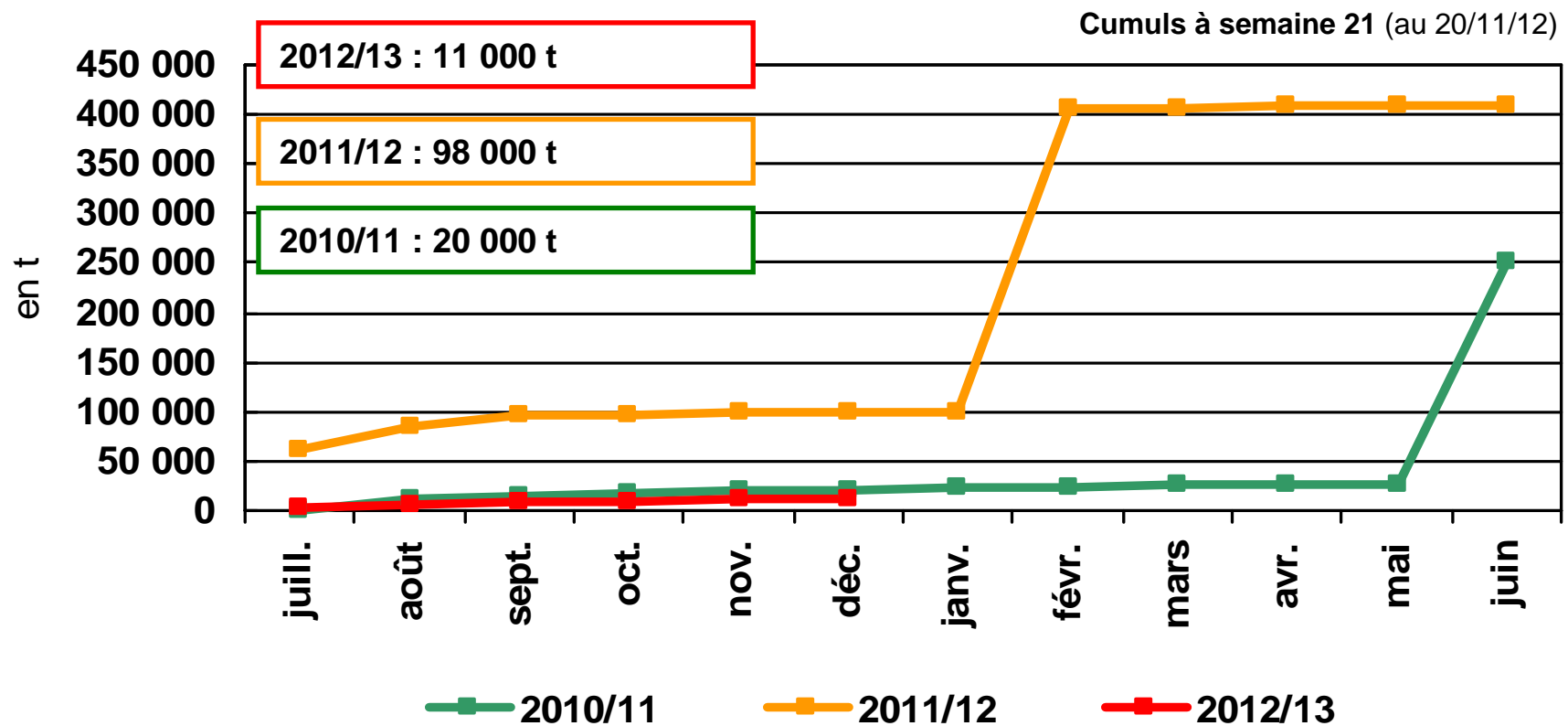
Blé tendre : certificats à l'importation délivrés dans l'UE



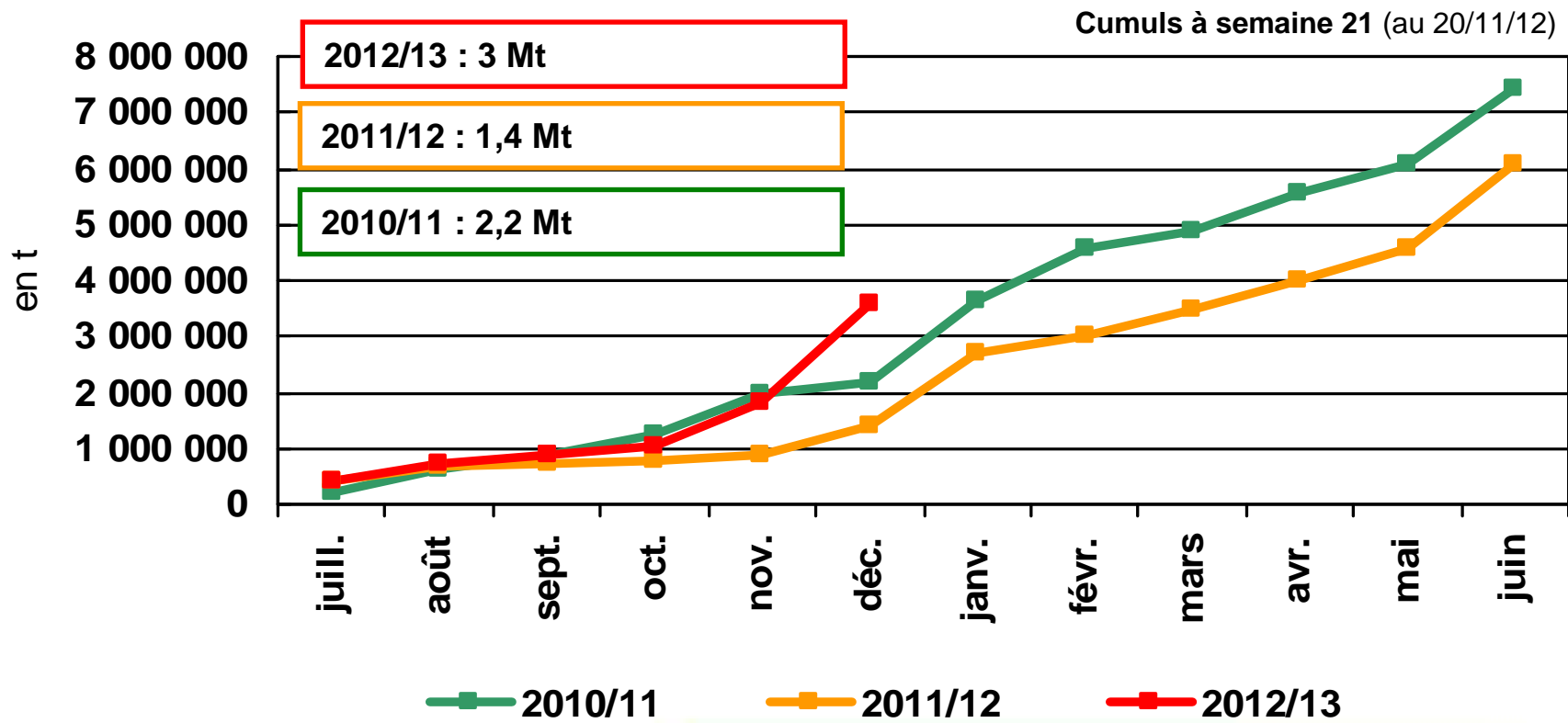
Blé dur : certificats à l'importation délivrés dans l'UE

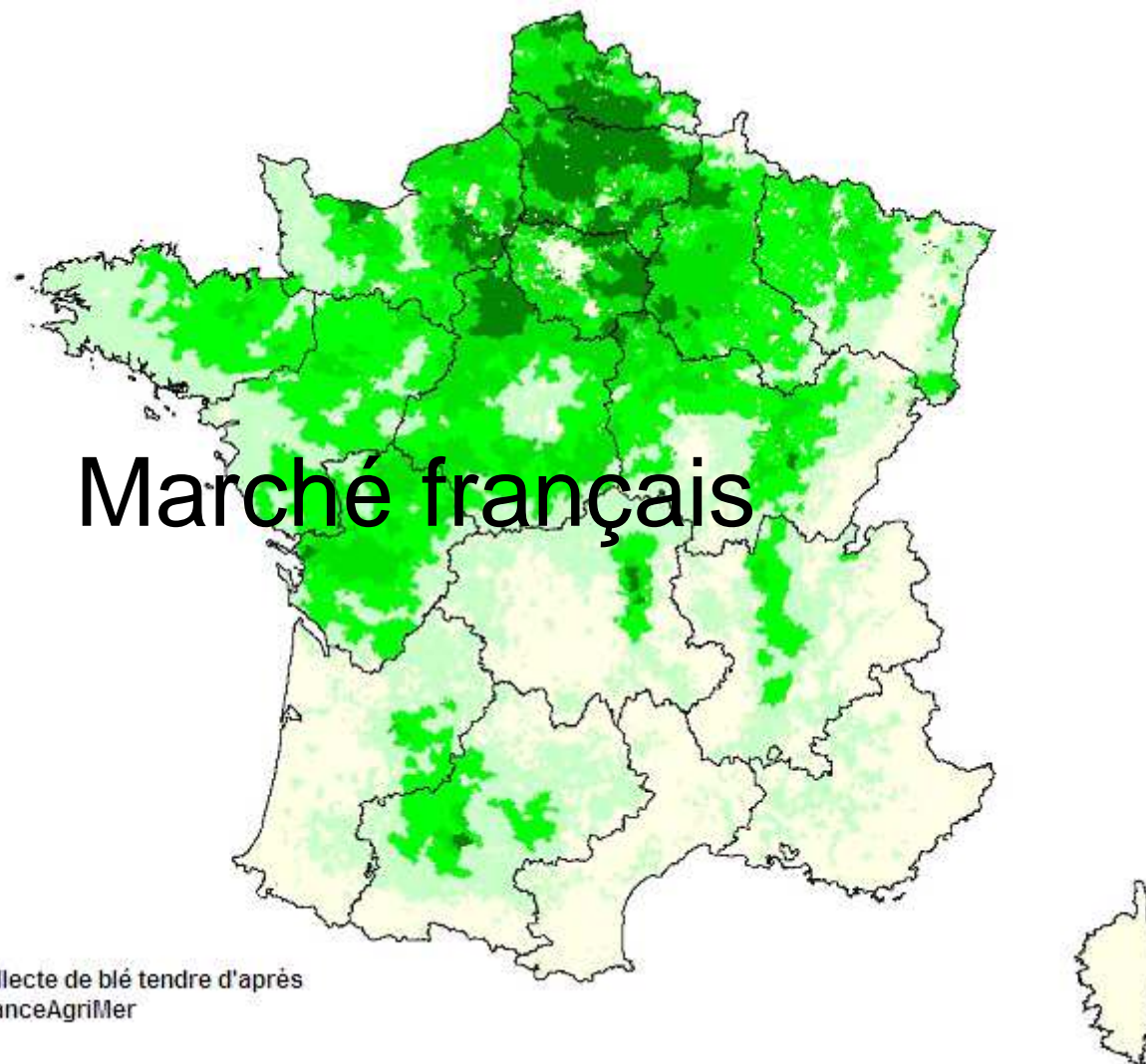
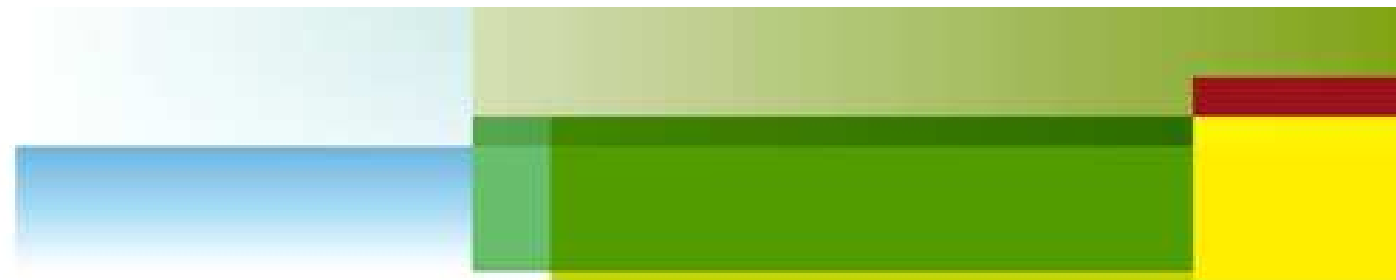


Orge : certificats à l'importation délivrés dans l'UE



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

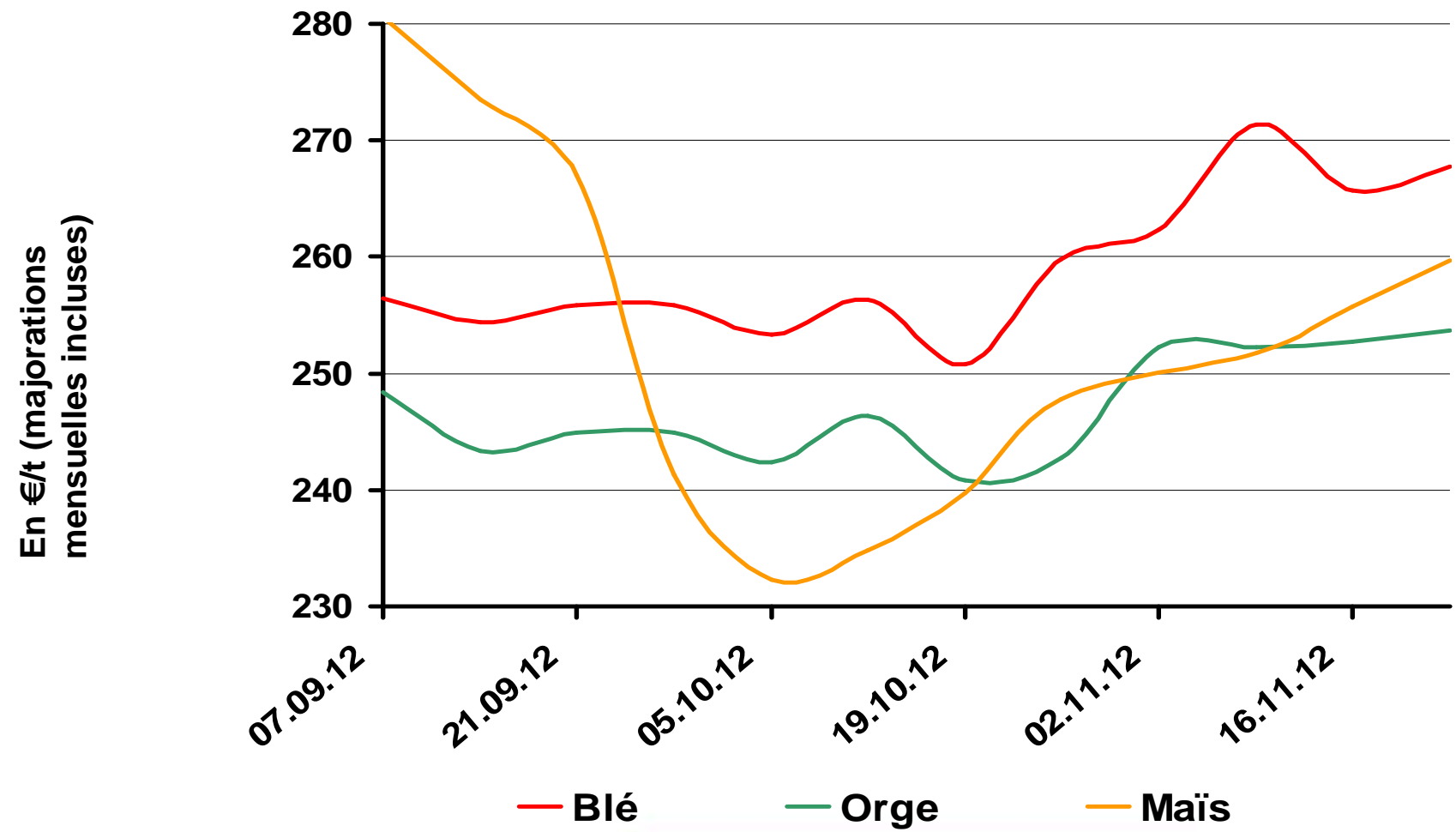




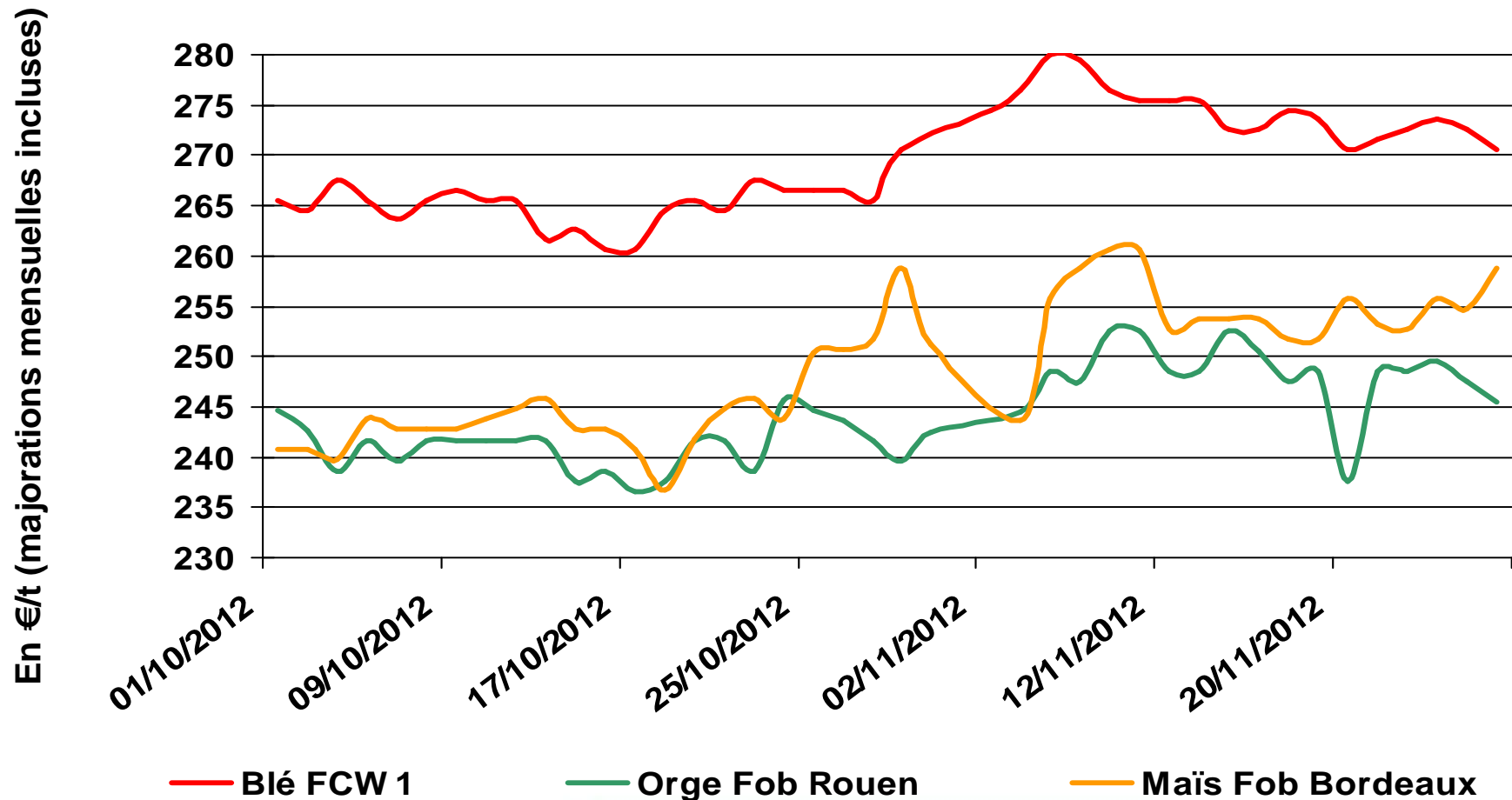
densité de collecte de blé tendre d'après les états 1 FranceAgriMer



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

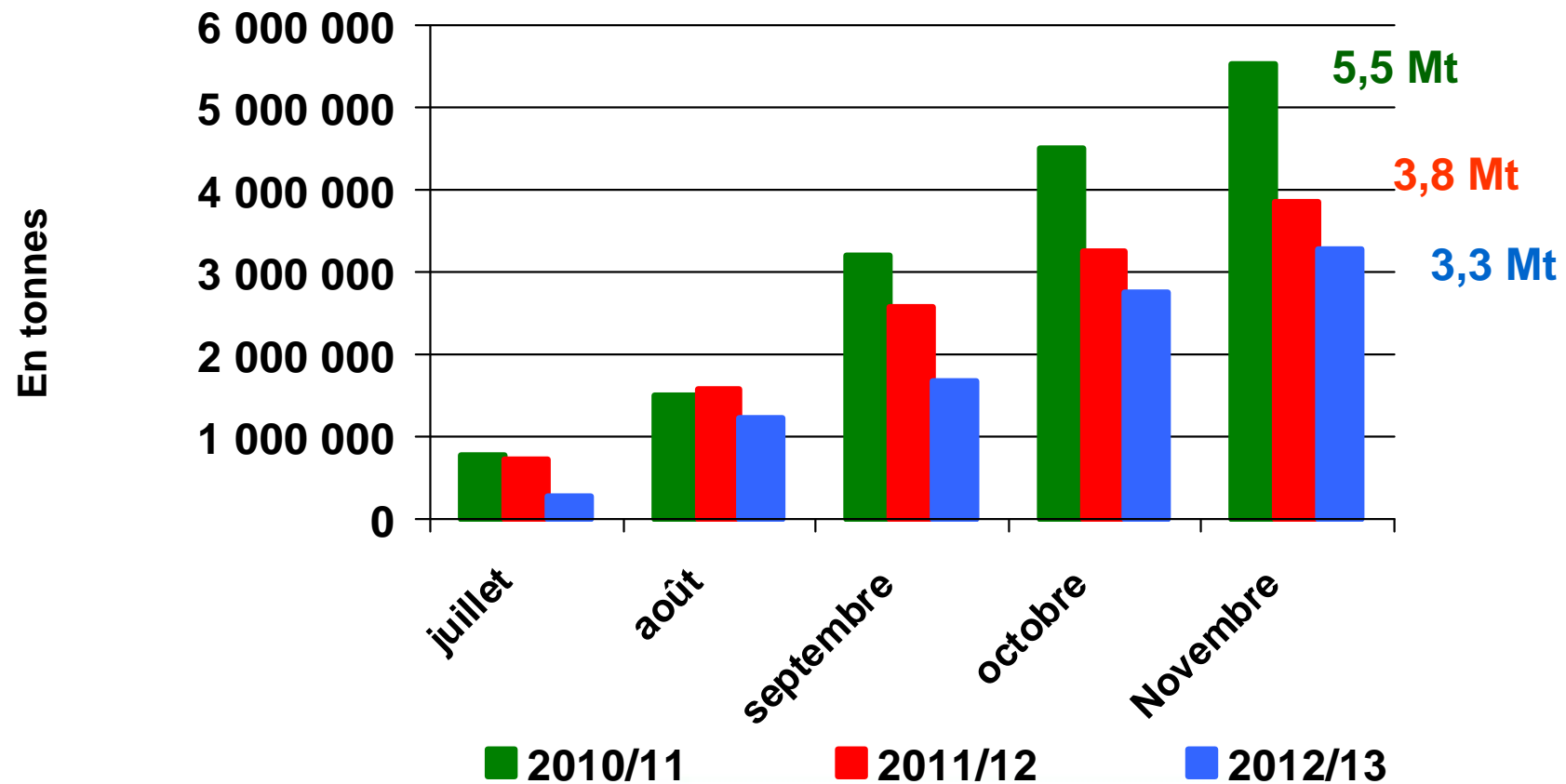


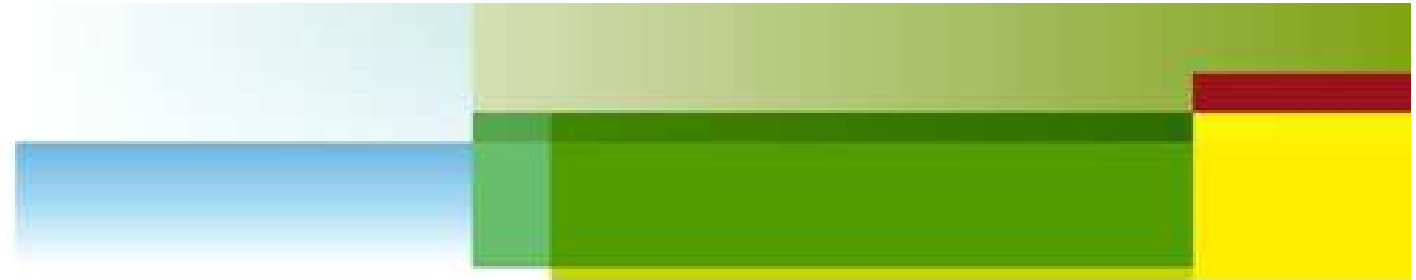
Céréales françaises : cotations à l'exportation





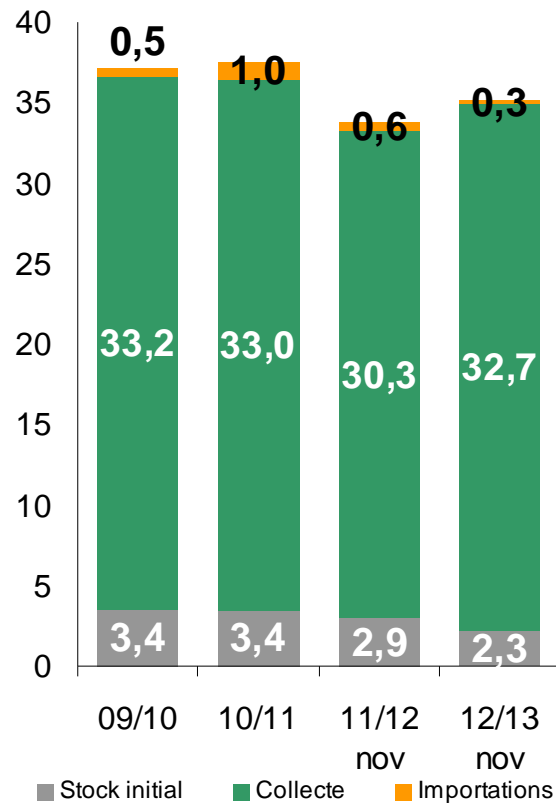
Blé tendre : cumul des embarquements vers les pays tiers depuis les ports français



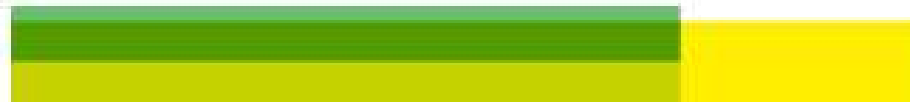
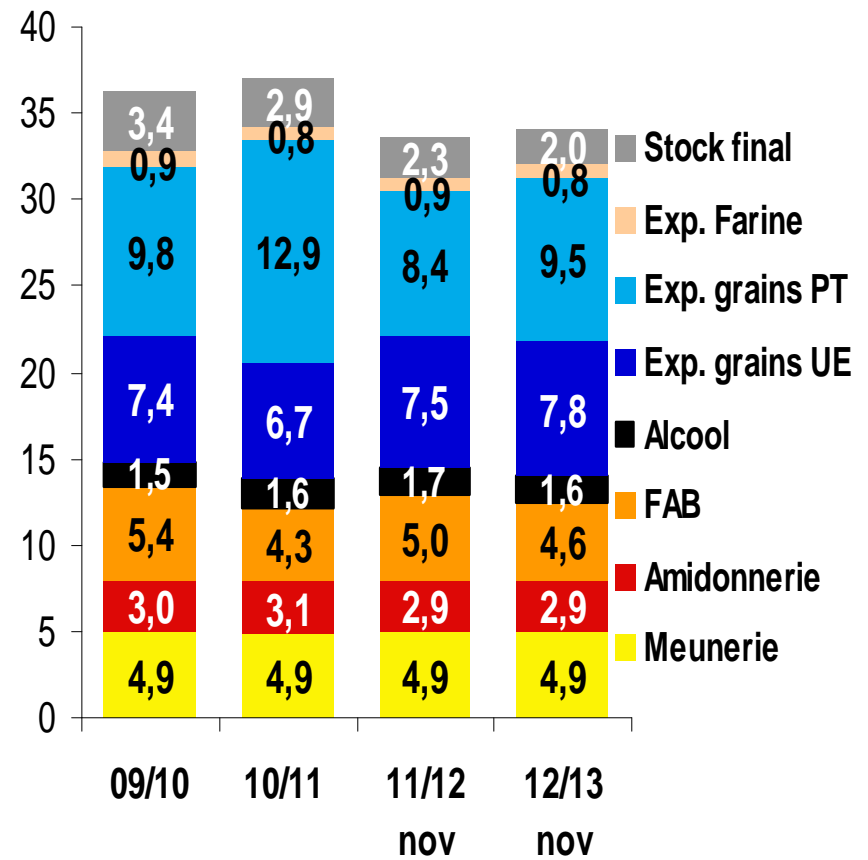


Bilan blé tendre

Mt



Mt



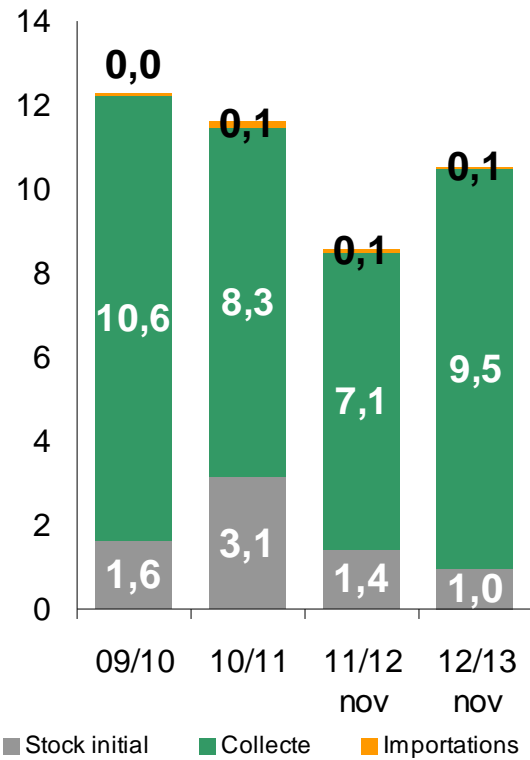
Exportations pays tiers au départ de la France

En Mt, projection FranceAgriMer

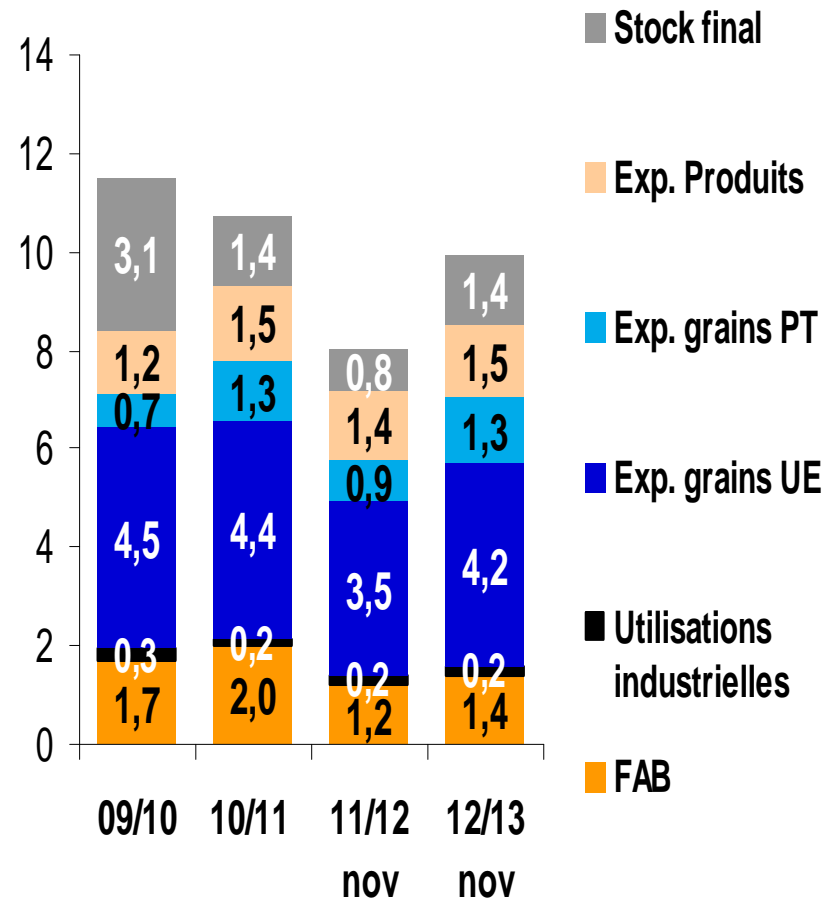
Maroc	2,5
Algérie	3,5
Tunisie	0,1
Lybie	0,1
Egypte	1,5
Ethiopie	-
Cuba	0,4
Syrie	-
Chine	-
Afrique subsaharienne	2,1
Yemen	0,4
Autres	-
Total Pays-Tiers	10,6

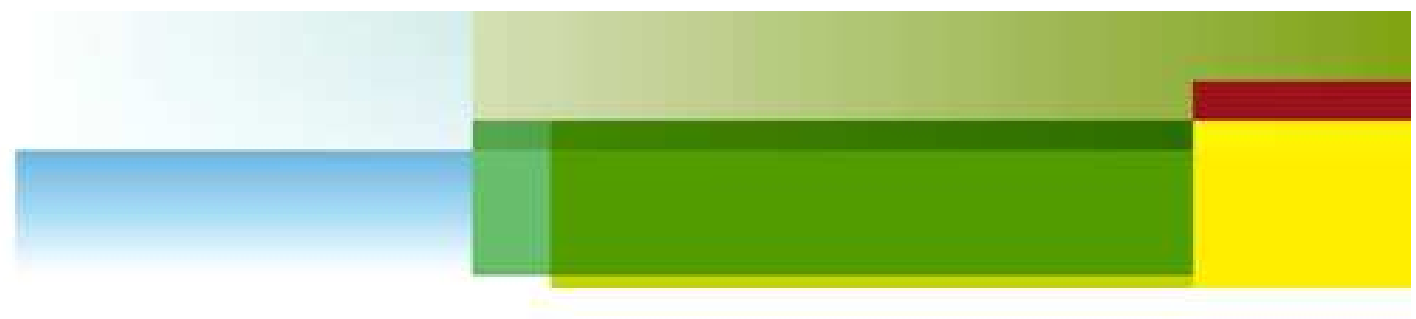
Bilan orges

Mt



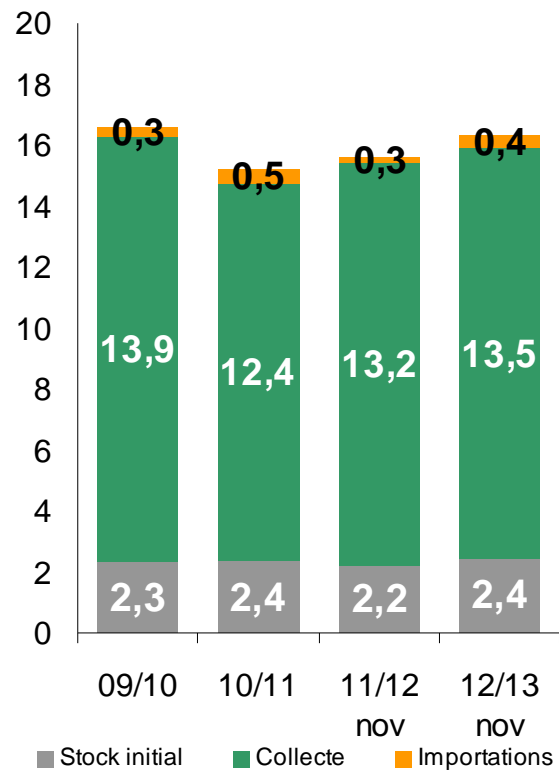
Mt



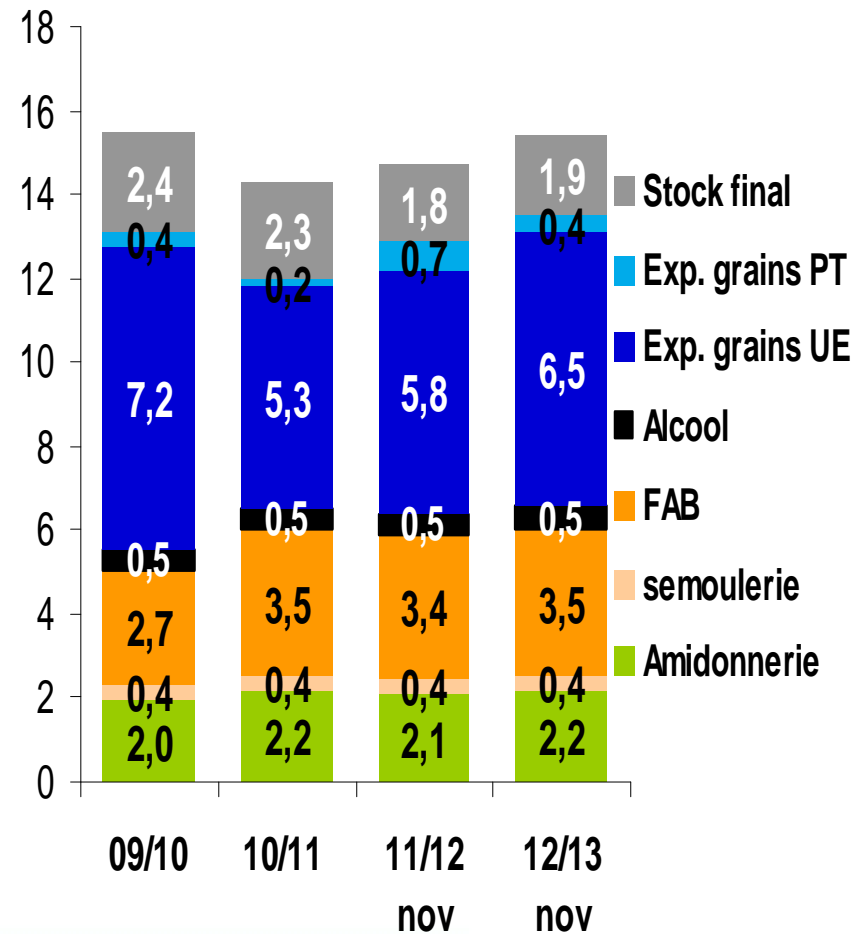


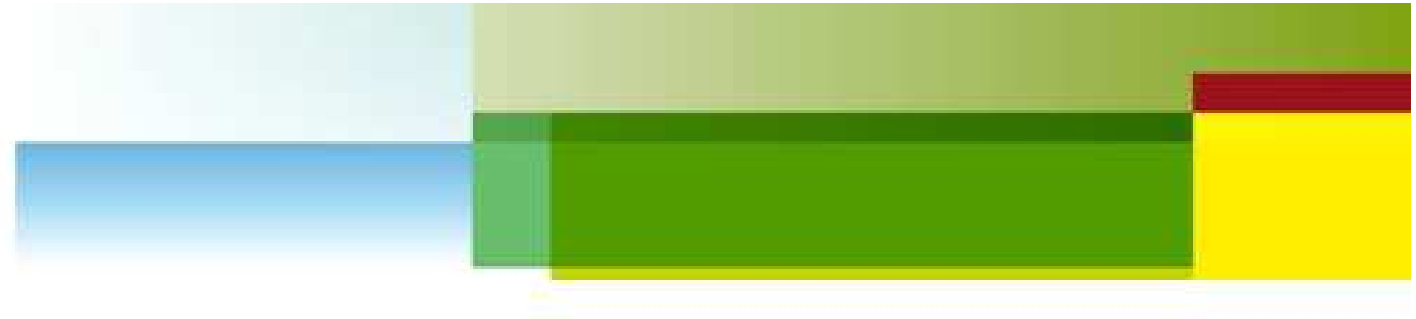
Bilan maïs

Mt



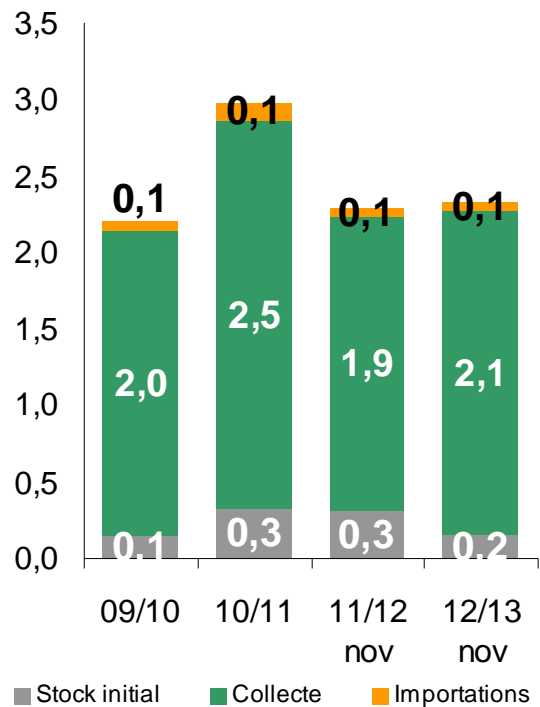
Mt



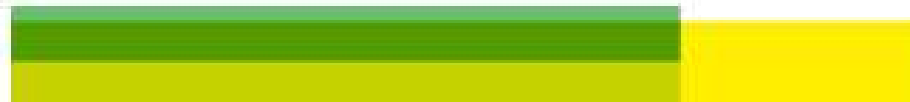
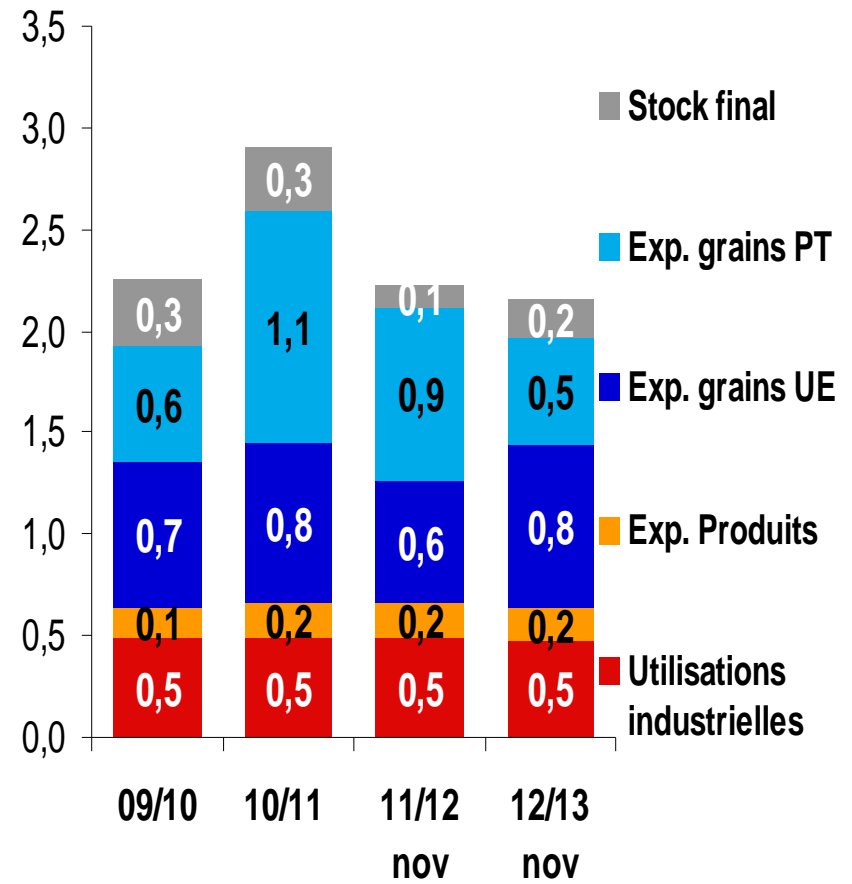


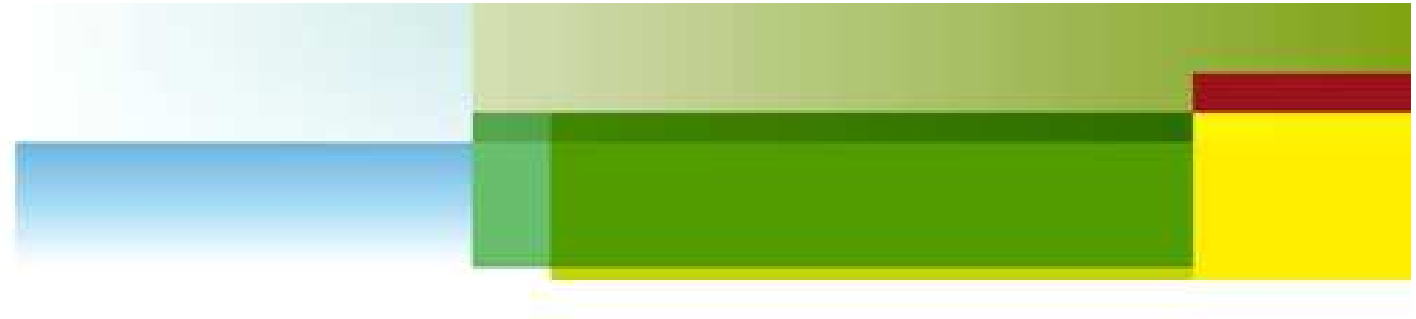
Bilan blé dur

Mt



Mt





Merci de votre attention



