

GRAINS MARKET ANALYSIS AND COMMODITY BALANCES AS TOOLS FOR FORECASTING AND FOOD SECURITY

23 September 2021

Introduction

Objectives:

- to provide the sectors with knowledge of supply, demand and price trends in the major regions of the world in order to assist in decision-making and support the analyses of economic operators and public authorities:
 - on a neutral and robust basis
 - in a shared manner: valorisation and dissemination.
- How, which methods and which sources, which valuations?

Content:

I. Monitoring international markets (characteristics, methods, illustration)

II. Building forecast balances (objectives, principles, prerequisites, example)

- Definition and objectives of a forecast balance sheet
- Building a forecast balance sheet
- Knowledge for elaborating a balance sheet: developing national and international expertise
- Collecting and compiling statistical data: contrasting situations in the Mediterranean region

CIHEAM & MED-Amin network

CIHEAM

- Intergovernmental organisation of 13 Mediterranean countries
- High level education, research and cooperation
- In agriculture, rural development, sustainable food systems



MED-Amin

- Network of the 13 CIHEAM countries (FPs, SRPs)
- Improve information sharing and ag. market transparency to prevent crises
- Launched in 2014 at Ministerial level
- Collaboration with FAO/AMIS and EC
- Coordinated by CIHEAM Montpellier
- Partnerships (e.g. IGC)



I. Monitoring International Markets

A multidimensional approach to grain market analysis

→ Integration of the macroeconomic and geopolitical environment in the analyses

Currency: EUR/USD parities (short-term and long-term).

On international markets largely invoiced in USD, the importance of parities:

- for the **price competitiveness of cereal exporters**: Russia, Ukraine, EU, USA, Canada, Argentina, Australia, Brazil...
- for the **purchasing power of importers**.

Monitoring that takes into account the evolution of monetary and budgetary policies as necessary: ECB, FED... impact on interest rates and economic growth.

→ Focus on fighting inflation or supporting growth?

The macroeconomic context: economic growth, facts to report (e.g. Covid-19 shock). In 2020, specific monitoring of the growth prospects of the major institutions (IMF, OECD, World Bank, etc.)

Energy markets, influencing agricultural commodity prices → monitoring oil prices, Brent, monitoring ethanol prices, monitoring OPEC/OPEC+ meetings

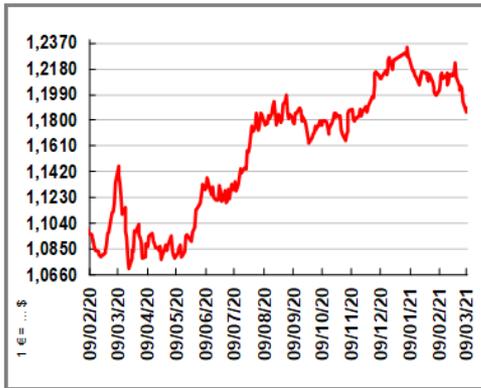
Sea freight markets: monitoring of freight price indices (Baltic Dry Index declined in Capesize and Panamax)

Climatic conditions and crop monitoring

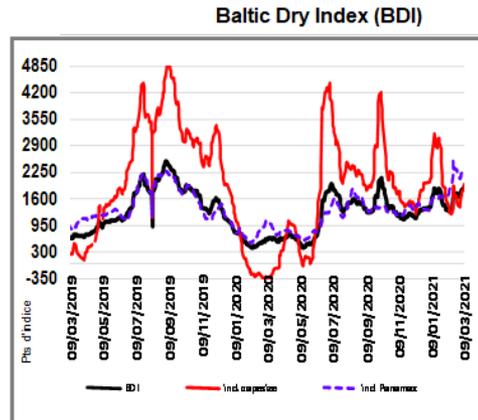
A look at futures markets, in particular the positions of non-commercial investment funds of a speculative nature

Example : macro-economic indicators presented at a "Cereals Specialised Council"

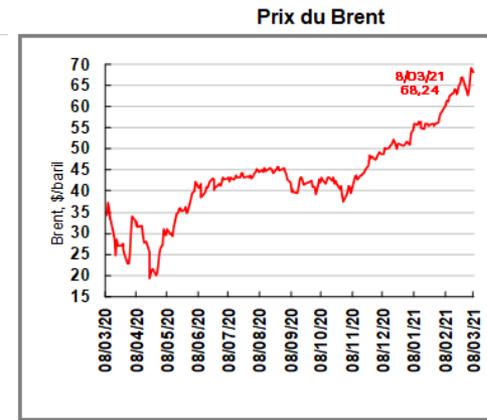
Courte durée



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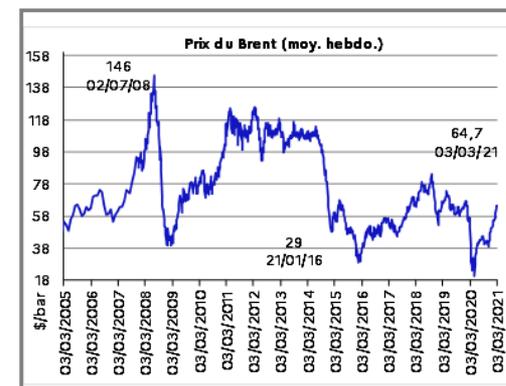
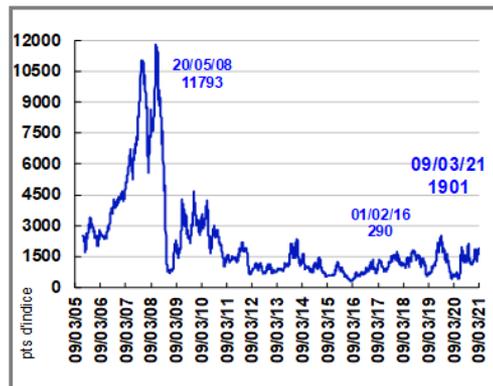
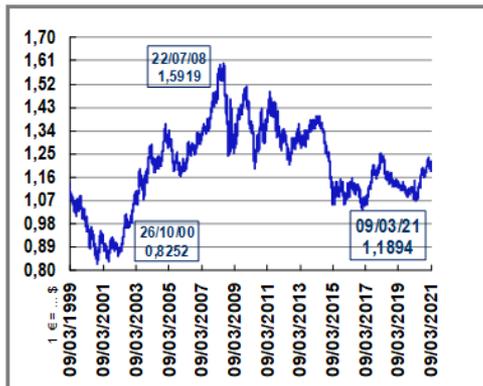


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Longue durée



Domestic policies affect commodity markets

Domestic policies that restrict exports are becoming more common in crisis situations.

→ Some recent examples on grains:

- **RUSSIA:**

- **Grain export quota** for wheat, rye, barley and maize of 17.5 Mt from 15 February to 30 June.
- **Wheat export tax:** €25/t (\$30) in the quota from 15 February, increased to €50 from 1 March to 30 June. Above the quota, the tax increases to 50% of the customs price, with a minimum of €100/t.
- **Export tax** on barley and maize of €10/t and €25/t respectively from 15 March to 30 June.
- **For 2021/22: floating tax on wheat exports** based on a proposal under discussion
- Regulation of domestic prices of "socially important products" - **bread** and other basic foodstuffs - for 90 days if their increase over 2 months exceeds 10%, excluding seasonal factors.
- **Sunflower oil:** agreement with Russian sugar and sunflower oil producers on price cuts with distribution until end of March 2021.

- **UKRAINE : wheat exports capped at 17.2 Mt in 20/21 and 24 Mt in maize (MoU)**

- **ROMANIA:** Concerns in the autumn about the ultimately unsuccessful possibility of a default clause on 2020/21 deliveries due to the historic drought. Abandoned project of export tax 04/2020.

→ On Palm Oil:

- **INDONESIA:** progressive export tax of \$55 to \$255/t CPO, depending on price levels, to generate funds for its palm biodiesel programme.
- **MALAYSIA:** raised CPO export tax from January to 8% (normal system, coupled with the level of international prices).

Geopolitics affect commodity markets

Geopolitical tensions influence supply, demand and prices

Examples:

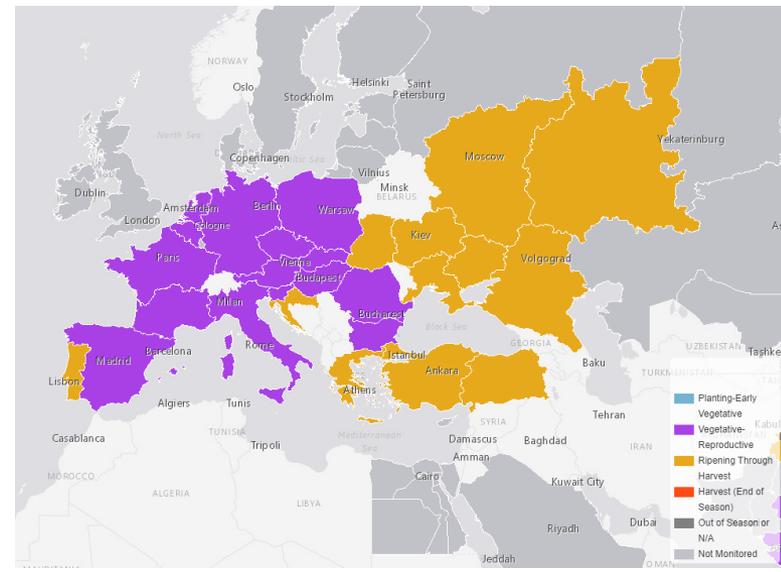
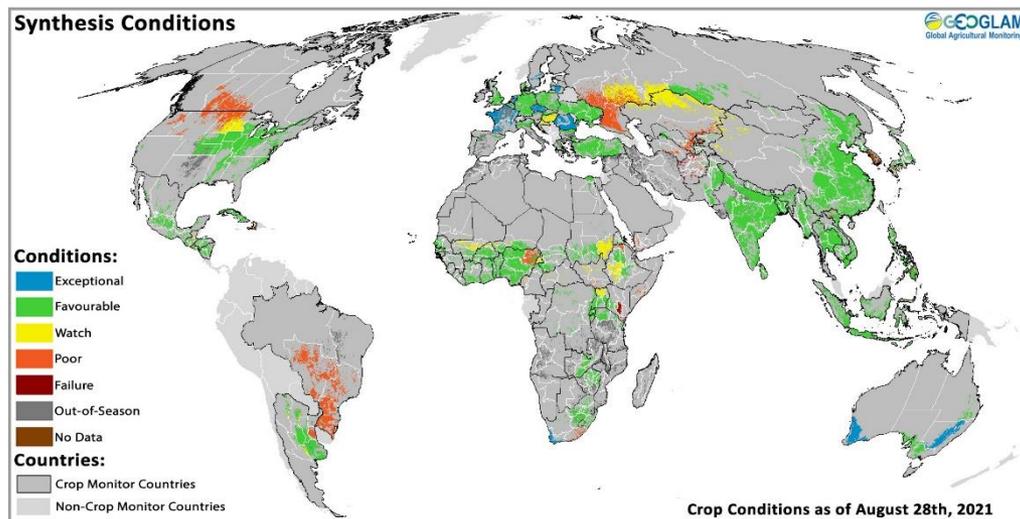
- **Trade and political tensions** China/USA, China/Australia, China/Canada, USA/EU, etc. → Follow-up of the implementation of the "Phase 1" agreement of 15/01/2020 between China and the US and impact on world grain supply and demand.
- **The offensive use of taxes and customs duties:** China/Australia (85% on Australian barley)
- **Tensions around oil/gas regions:** e.g. Eastern Mediterranean, Persian Gulf countries, Russia/Ukraine, Nord Stream 2 pipeline route... For example, the recent drone attack on Saudi Arabian facilities immediately pushed up the price of Brent.
- **Political upheaval**
- Impacts of **extraterritorial legislation**, particularly from the US, on trade
- **Economic embargoes**
- **Geopolitics and logistics:** the "New Silk Roads" strategy as a vehicle for China's economic power

Agromet and crop conditions affect commodity markets

Market monitoring requires regular monitoring of weather and crop conditions.

→ Different sources:

- The **GEOGLAM** (GEO Global Agricultural Monitoring) initiative, launched by the G20 in 2011, in conjunction with the creation of AMIS. Led by a team of researchers from the University of Maryland and in partnership with NASA for the crop observation satellite network.
- Since 2013, GEOGLAM has been providing **AMIS** with a global overview of field crops in the G20 countries and 7 other producer/exporter countries, which is published every month <https://cropmonitor.org/>
- With Céré'Obs, FranceAgriMer contributes for France to crop monitoring carried out by AMIS
- For more information: <https://nasaharvest.org/index.php/news/geoglam-crop-monitor-agricultural-market-information-system-providing-timely-information>



Agromet and crop conditions

Public information sources:

- **USDA / US:** USDA Crop Progress Report, Drought Report <https://www.usda.gov/sites/default/files/documents/AgInDrought.pdf>
- **Weekly weather & Crop Bulletin (US and World):** <https://downloads.usda.library.cornell.edu/usda-esmis/files/cj82k728n/3b592422r/xw42p369d/wwcb1021.pdf>
- **World Meteorological Organization (UN agency),** including El Niño/La Niña monitoring: <https://public.wmo.int/en/media/press-release/la-ni%C3%B1a-has-peaked-impacts-continue>
- **European Union: JRC MARS (Monitoring Agricultural Systems)** publishes a detailed monthly weather and crop report for Europe and the Mediterranean: <https://ec.europa.eu/jrc/en/mars/bulletins>

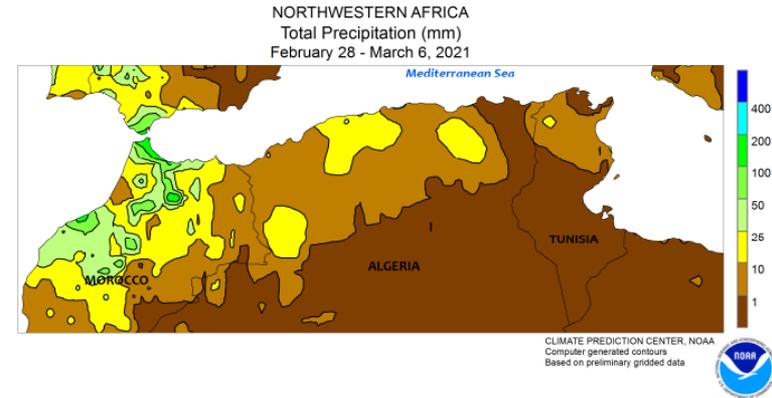
Private sources:

- Black Sea area: UkrAgroConsult subscription <https://ukragroconsult.com/en/>
- South America: <http://soybeansandcorn.com>
- Visio Crop, other models (social networks)...

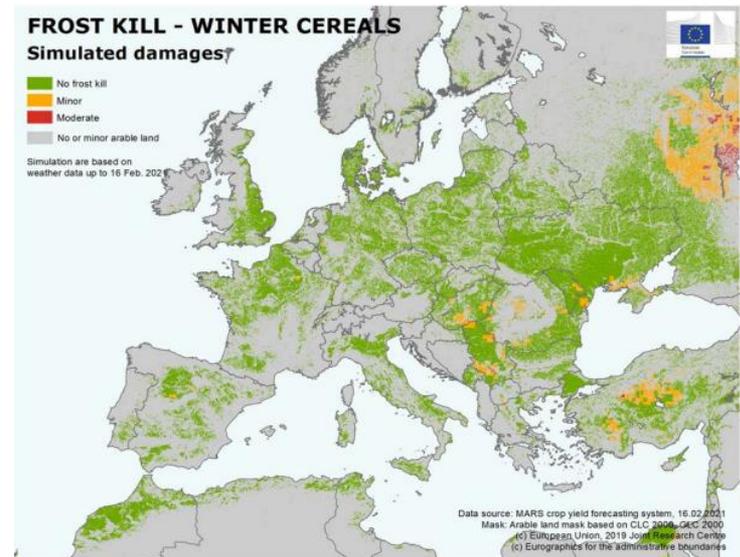
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Weekly Weather and Crop Bulletin

March 9, 2021

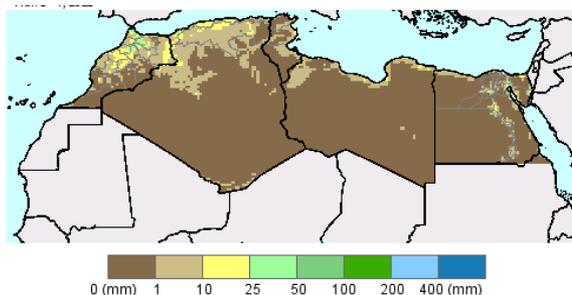


NORTHWESTERN AFRICA
Additional well-timed rain in Morocco contrasted with supplies locally, while short-term dryness and drought



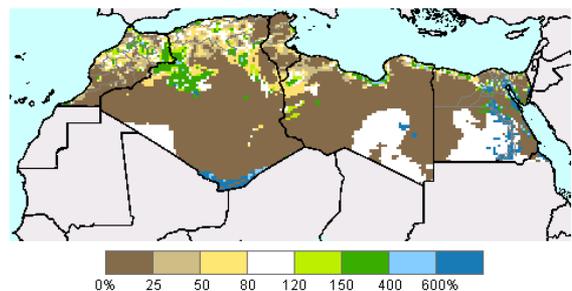
Agromet and crop conditions mapping

- JRC MARS for Europe (<https://ec.europa.eu/jrc/en/mars/bulletins>)
- Crop Explorer USDA
<https://ipad.fas.usda.gov/cropexplorer/Default.aspx>
- NASA <https://nasagrace.unl.edu>
- NOAA <https://www.cpc.ncep.noaa.gov> US climate forecasts



USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

Source: CMORPH (CPC MORPHing) technique - NOAA
<http://www.cpc.ncep.noaa.gov/>



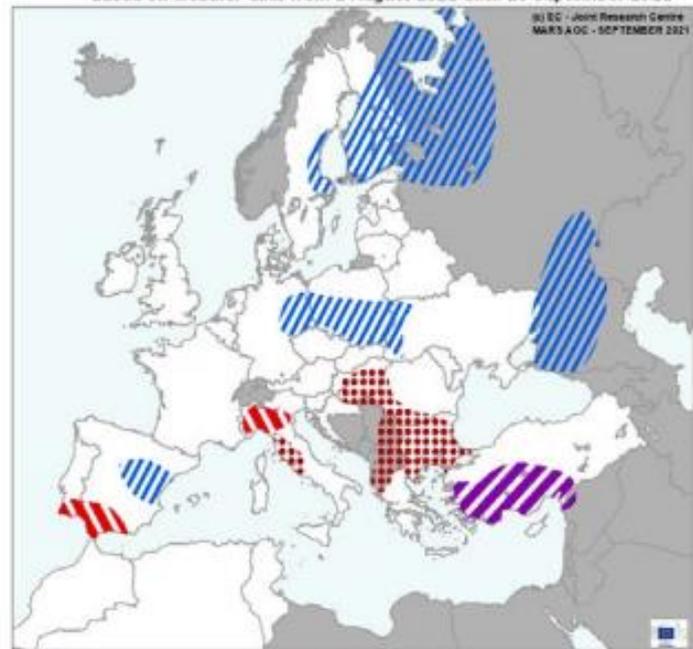
USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

Source: CMORPH (CPC MORPHing) technique - NOAA
<http://www.cpc.ncep.noaa.gov/>

Source: USDA/NOAA

AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 August 2021 until 10 September 2021



Blue diagonal lines: Rain surplus
Red diagonal lines: Rain deficit
Red dots: Drought
Purple diagonal lines: Heatwave

Market monitoring: supply, demand, price, international trade from relevant regions

1. Public sources of international information, macroeconomic environment: World Bank, OECD, IMF

- For example Outlook 2021 on <https://www.banquemondiale.org/fr/publication/global-economic-prospects>
- OECD: <https://www.oecd.org/fr/france/>

2. IGC reports, databases, meetings

Members' area of the website https://www.igc.int/en/members-site/igc_members_home.aspx

- *Daily monitoring of markets and prices in cereals, oilseeds, freight prices, currency monitoring*
- *Access to downloadable databases on prices, currencies, markets, exchanges etc...*
- *Weekly publications of indicators*
- *Monthly reference reports*

3. USDA : Reports and sources

- *Global Reports:* <https://www.usda.gov/oce/commodity/wasde>
- *Grain Reports:* <https://downloads.usda.library.cornell.edu/usda-esmis/files/zs25x844t/kh04fh27x/4b29c186z/grain.pdf>
- *Oilseed Reports:* <https://downloads.usda.library.cornell.edu/usda-esmis/files/tx31qh68h/hq37wg66q/q237jm44p/oilseeds.pdf>
- *PSD Online database: construction of customised reports per country up to balance sheets, all countries, all products:* <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>
- *Reports from US agricultural attachés in office:* <https://gain.fas.usda.gov/#/search>

The screenshot shows the 'IGC Market Information Reports' page. It is organized into four main sections: Daily Reports, Weekly Reports, Monthly Reports, and Annual Reports. Each section contains a list of reports with their respective dates and a dropdown arrow for selection.

IGC Market Information Reports	
Daily Reports	
Daily Monitor	Thursday 12 Aug 2021 ▾
Price Sheet	Thursday 12 Aug 2021 ▾
Oilseeds Brief	Thursday 12 Aug 2021 ▾
Rice Brief	Thursday 12 Aug 2021 ▾
Weekly Reports	
Grain Market Indicators	Wednesday 11 Aug 2021 ▾
Ocean Freight Rates	Tuesday 10 Aug 2021 ▾
Monthly Reports	
Grain Market Report	Thursday 29 Jul 2021 ▾
GMR Market & Trade Plus	
Annual Reports	
World Grain Statistics	2019 ▾
Grain Shipments	2018/19 ▾

Market monitoring: supply, demand, price, international trade from relevant regions

4. FAO / AMIS releases, events

- **FAO Statistics Database** <http://www.fao.org/economic/est/statistical-data/en/>
- **AMIS Market Monitor** : <http://www.amis-outlook.org/amis-monitoring/monthly-report/en/#.YE8riGhKjDe>

The monthly report includes detailed analyses of fertilizers markets, oil markets, futures markets, comparative analyses of AMIS, USDA, IGC, etc.

5. National Agencies:

- **ABARES (Australia** <https://www.agriculture.gov.au/abares>)
- **CONAB (Brazil** <https://www.conab.gov.br/>)

6. Private Sources:

- **REUTERS** and associated services (monitoring of vessels: Reuters/Refinitiv)
- **Agri Census Daily** : Ag. Information Agency <https://www.agricensus.com/>
- **IHS Markit** : Monitoring on environment, markets, all commodities <https://ihsmarkit.com/index.html>
- **Black Sea: UkrAgroConsult** consultancy from Kiev. Comprehensive and high quality analyses on supply/demand/price, climatic and growing conditions in the Black Sea region. Events e.g. "Black Sea Grains Conference". <https://ukragroconsult.com/en/>
- **South America**: Soybean & Corn Report → monitoring of growing conditions, production, markets, trade of soybean and maize in Brazil and Argentina <http://soybeansandcorn.com/>
- **BAGE, Bolsas de Cereales (Argentina** <https://www.bolsadecereales.com/>)
- ...

Trade

Specific monitoring of purchases/evolutions in the main cereals buying countries/regions of the world:

- China, Russia, US
- Maghreb: Algeria, Morocco, Tunisia,
- Middle East countries: Egypt ...
- Sub-Saharan Africa
- Indonesia, Australia, Argentina, Brazil, Ukraine (cf. webinar of May 2021 with IGC)

→ Monitoring of tenders (specialized sites, social network influencers, consultants...)

Some sources of information:

- Tallage / Stratégie Grains
- IGC
- USDA
- Reuters / Refinitiv
- Other

Trade

Trade Data Monitor (TDM): External trade database

<https://tradedatamonitor.com/index.php#features-wrapper>

PSD Online (USDA): <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>

Free access tool

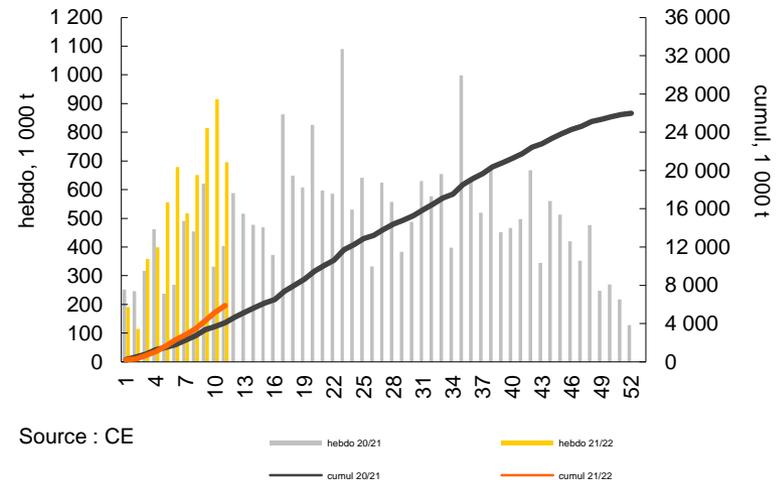
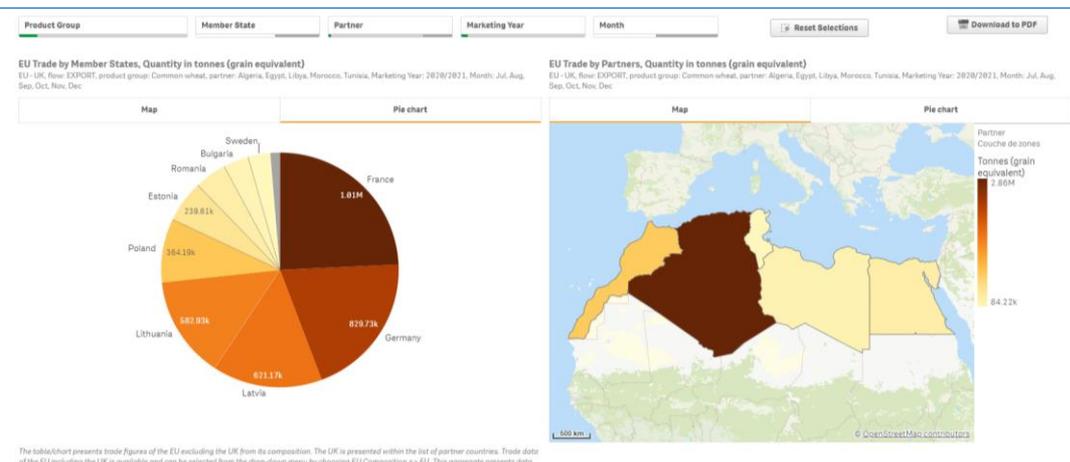
ITC Trade Map - Statistiques du commerce pour le développement international des entreprises

<https://www.trademap.org/Index.aspx>

UN Comtrade | International Trade Statistics Database <https://comtrade.un.org/>

EU: EUROSTAT, data monitoring TAXUD of European Commission

EU Agricultural Observatories: https://ec.europa.eu/info/food-farming-fisheries/farming/facts-and-figures/markets/overviews/market-observatories_fr



Information on the current situation and market monitoring

REUTERS: qualitative information, news, prices monitoring

- Monitoring of vessels line-ups:
Reuters/Refinitiv basic monitoring by FranceAgriMer of shipments from French ports
- Cross-sector information through monitoring of the sugar and oilseed markets

Prices Monitoring

- **Monitoring prices on the futures markets:** Euronext Wheat, Canola, CBOT in US, CoT reports
- **International quotations:** IGC, EU & France
- **Monitoring of freight prices:** IGC data

Information watch on EU/World logistics conditions: e.g. strikes, bottlenecks, particularly in Latin America, climatic accidents (Mississippi, Rhine, Danube, etc.)

→ Example: Monitoring vessels itineraries REFINITIV/REUTERS

SHIP	PRODUCTS	TONNES	DESTINATION	OPERATOR	STAT	DAY
ROUEN						
[REDACTED] LP	BARLEY	51 000	CHINA	[REDACTED]	L	06Jul
[REDACTED]	WHEAT	7 000	CAMEROON	[REDACTED]	A	07Jul
[REDACTED]	WHEAT	6 000	GABON	[REDACTED]	A	07Jul
[REDACTED]	BARLEY	30 000	MEXICO	[REDACTED]	A	08Jul
KEY LP	BARLEY	50 000	CHINA	[REDACTED]	A	08Jul
DUNKIRK						
[REDACTED]	NONE	LOADING	NONE	[REDACTED]		06Jul
CAEN						
[REDACTED]	NONE	LOADING	NONE	[REDACTED]		06Jul
CORA						
[REDACTED] n)	WHEAT	23 750	CUBA	[REDACTED]	L	06Jul
[REDACTED]	BARLEY	30 000	CHINA	[REDACTED]	A	08Jun
[REDACTED]	MALT.BLY	35 000	CHINA	[REDACTED]	A	07Jul
[REDACTED]	MALT.BLY	35 000	CHINA	[REDACTED]	A	08Jul
[REDACTED]	WHEAT	4 000	NETHERLANDS	[REDACTED]	A	09Jul
[REDACTED]	WHEAT	34 000	AFRICA	[REDACTED]	A	09Jul
[REDACTED]	MAIZE	3 000	AFRICA	[REDACTED]	A	09Jul
[REDACTED]	BARLEY	50 000	CHINA	[REDACTED]	A	10Jul
TRANS	BARLEY	11 000	CHINA	[REDACTED]	A	12Jul
KEY I	MALT.BLY	20 000	CHINA	[REDACTED]	A	12Jul
SH	BARLEY	35 000	CHINA	[REDACTED]	A	17Jul
TONNAY/ROCHEFORT						
[REDACTED]	NONE	LOADING	NONE	[REDACTED]		06Jul
NANTES						
[REDACTED]	WHEAT	4 000	PORTUGAL	[REDACTED]	A	07Jul
[REDACTED]	FWHEAT	4 000	NETHERLANDS	[REDACTED]	A	08Jul
LA PALLICE						
[REDACTED]	WHEAT	8 000	PORTUGAL	[REDACTED]	L	06Jul

How are these data and analyses taken into account?

→ Elaboration of a synthetic situation of the World/EU markets (dashboard)

A monthly presentation of the market situation:

- **World:** see above, methodology, sources
- **EU:** based on trade data and documents drawn up by the European Commission and presented to the monthly “Committee for arable crops monitoring”.
- **National:** by monitoring trade and drawing up S&D forecasts at a dedicated meeting

In France, the synthetic situation is presented every month to the “*Specialised Council for Arable Crops and Cereal Markets*” (CSGC) (FranceAgriMer):

- Composed of representatives of the State and professional federations (production, trade, exchange, processing, distribution) and chaired by a farmer
- Comments on and discusses the market situation, **validates forecasts** and discusses all subjects within its remit.
- CSGC news on: <https://www.franceagrimer.fr/filiere-grandes-cultures/Actualites-nouvelle-gouvernance>

II. Building Forecast Balances

Definition and Objectives of a Forecast Balance

It is a tool for aggregating a certain amount of information on grain volumes (production, trade, uses, etc.), the scope of which is limited geographically and temporally.

Objectives:

- To inform private operators and public services
- To guarantee transparency
- To reduce market uncertainties and therefore price volatility
- To support public policies elaboration and private actors' strategies
- To increase food security
- To optimise flows and thus gain in competitiveness

Forecast Balance Building

Geo scope: national / Frequency: period (NMY) ? / Units: weight, currency, etc. / Commodities: Grain + products of 1st transformation (+2nd transfo) ?

National supply:

- **Production** (can be broken down into different agregates, e.g.: collected + on-farm consumption)

Data needed: Areas x Crop Conditions (Yields)

- **Initial stock** (=> Final Inventory of NMY-1)
- **Imports**

National demand:

- **Domestic Utilizations:**
 - Food
 - Feed
 - Industrial Uses (e.g.: biofuels, biomaterials)
 - Other Uses (losses, seeds, etc.)
- **Exports**
- **Final Stocks** (=> quantity available not consumed)

Unit(s) Année N / année N+1	N-1	N	N	Var / N-1
		M-1	M	%
Production (A)				
Stock initial (B)				
Importations (C)				
Total disponible (A+B+C)				
Utilisations domestiques (D)				
<i>Alimentation humaine</i>				
<i>Alimentation animale</i>				
<i>Utilisation industrielle</i>				
<i>Autres utilisations</i>				
Exportations grains (E)				
Total utilisé (D+E)				
Stock final (A+B+C-D-E)				

=> The balance is never complete

Need of national and international expertise



Knowledge of the macro/international context:

- Monitoring of international markets is a prerequisite for drawing up forecast national balance sheets
- Anticipation of international supply and demand, by analysing the factors influencing price variations, supply & demand

Knowledge of the domestic market (national scale):

- Knowledge of the sectors (capacities in logistics, processing, storage, export/trade, identification of key-operators, etc.)
- Knowledge of the factors influencing grains prices at national level
- Knowledge of national S&D characteristics (production, production quality, primary and secondary processing capacity, available stocks, etc.) and its drivers
- Knowledge of the links between national and international markets (geopolitical issues, historical partners, competitiveness, etc.).

➔ **The expertise is built on figures** (historical balance sheets, surface areas, etc.)

Agricultural data collection and Statistics in the Med

The collection/recovery of data from professionals depends on:

- The regulatory context in force in the country
- The organization and governance of the sectors (as well as the relations established between the operators in the sectors - public services, collectors, traders, processing industries, etc.)

I. Different regulatory contexts in the Med area

Country	Reporting of data (origin and mechanism)						
	Compulsory ?	Stocks	Production / Collect	Trade	Processing and utilizations	Platform of public access to data	Comments
France	Y	FranceAgriMer (Inventories declared by collectors)	A/Y/P/Pr <-FranceAgriMer (yields based on crop conditions) + SPP (production through surveys) released on Agreste	FranceAgriMer estimates built on expertise from FranceExportCéréales, traders. Depend on current domestic and CFR prices	Private sector (main operators). Importance of feed processing	https://agreste.agriculture.gouv.fr/agreste-web , Céré'Obs	Obligation to report data to on collection, utilizations and trade to MoA (FranceAgriMer). These operator are involved in the Specialized Grain Council who validate cereal balances on a monthly basis. EU Reg. 2017/1185
Lebanon	N	MoE	MoA, Office Cereals and Sugar Beet	Customs, MoE	Private sector (main operators)		No obligation of reporting. Data flow and collection not centralized, integrated, institutionalized between ministries and with private sector. Estimates with big differences depending on sources, not really reliable. Official estimates come from Dept of Stats of MoA. Most reliable data come from private sector (big farmers, traders)
Tunisia	N	limités aux silos OC, mais lien avec Sociétés Mutuelles	DGPA (MoA) pour production; OC pour collecte, en lien avec Sociétés Mutuelles	INS + OC	OC (ventes vers opérateurs pour Food et Feed)	OC, ONAGRI (www.agridata.tn, agrinet), INS	No obligation of reporting.
Turkey	N	TMO (for public facilities) + private sector administrative data	MoA + TurkStat surveys and administrative registers from province/district to national level	TurkStat data (from National trade information system) + Union of Chambers and Commodity Exchanges of Turkey	TurkStat surveys at industry sector – feed sector administrative data + TurkStat food surveys	Statistical Data Network, (data.tuik.gov.tr/ & https://biruni.tuik.gov.tr/medas/)	According to TURKSTAT law, sector or state organizations have to respond to surveys and administrative registration requests. TurkStat responsible for analysis and publication of data, joint task with MoAF (compilation at district level). Data based on administrative registers (sector or state organization data, subsidies records, etc) and surveys. Validation of the "Agricultural Products Estimation Committee" consisting of 11 institutions (interpro). TMO intervienes on public storage facilities, national food security and price balance.

Agricultural data collection and Statistics in the Med

	Public authority for purchase	Interprofession organized?	Authorities producing statistics on grains	Dialogue (regular) with private/public bodies?	Comments
Albania	private		dept of Stats (MoA)		
Algeria	OAIC, 95% volume SW	Y		Y	Inter-professional national cereals Council created in 2018, linked to provincial interpro councils
Egypt	GASC, 70% volume				
France	private	Y	FAM / SSP (MoA)	Y	"Specialized Grain Council" meet every month
Italy	private		ISMEA		Complex organization of inter-profession because of many operators, e.g. durum wheat/pasta
Greece	private	Y	Hellenic Statistical Authority, OPEKEPE CAP payment authority	-	Interprofession organized like the Association of Greek Rice Millers and Cooperatives
Lebanon	private		dept of Stats (MoA)		Joint committee of cereals that gather public/private. Not operating during the current crisis
Malta	private				
Morocco	private	Y		Y	FIAC
Portugal	private		GPP (MoA)	Y	Monitoring Committee of the Cereals National Strategy (private/public alliance) meet twice a year
Spain	private	Y		Y	Dialogue organized by MoA at least twice a year
Tunisia	OC, 1% volume		DGPA et ONAGRI (MoA)		OC en contact permanent avec les acteurs privés de la filière (ex. collecteurs, transformateurs)
Turkey	TMO, 10% volume	Y	TurkStat / MoA	Y	"National Cereals Council" (producers, industrialists, cooperatives, ministry representative, etc + board of directors, a research board, and a holding board) meeting once a year and "Agricultural Products Estimation Committee" consisting of 11 institutions

II. Organization and governance of the grains sector vary in the Mediterranean region

Forecast Balance

France's case

Forecast Balances: monitoring tool of the availabilities and utilizations of cereals in France

On the basis of **declared** collection data and utilization data from agri-food companies and customs, and in consultation with **experts** in the French cereal sector, FranceAgriMer draws up and publishes S&D balances from **beg. July N**, particularly for **common wheat, durum wheat and barley** for the N/N+1 NMY.

The balances are published after they have been **validated** by the **FranceAgriMer Specialised Council (CSGC)**, which brings together producers, exporters and processors.

These balances are revised **monthly** (except August).

Availabilities for the market (not considering self-consumption and on-farm storage)

Utilizations by the French domestic market

Exports (grains & derived products: flour, etc.)

Final stocks available for the next marketing year

Bilan français du blé tendre

En 1000 t juillet - juin	2019/20	2020/21 Prov. Sept- 21	2021/22 Prév. Juil- 21	2021/22 Prév. Sept- 21	Var R2021/R2020 %
Production	39 551	29 176	37 097	36 064	24%
Stock initial	2 670	3 028	2 650	2 341	-23%
Collecte	36 518	27 263	34 194	33 310	22%
Importations	232	208	200	200	-4%
Total disponible	39 464	30 543	37 094	35 902	18%
Utilisations domestiques	15 190	14 319	15 282	15 073	5%
<i>Panification</i>	2 681	2 709	2 700	2 700	0%
<i>Biscott., biscuit. et pâtisseries indus.</i>	1 150	1 135	1 130	1 130	0%
<i>Amido/Glut</i>	2 606	2 608	2 600	2 600	0%
<i>Alcool (y.c. bicarburants)</i>	1 520	1 600	1 600	1 600	0%
<i>FAB</i>	4 959	4 543	5 400	5 200	14%
<i>Autres</i>	981	553	600	600	8%
Exportations grains	20 998	13 657	17 924	17 756	30%
<i>Pays tiers</i>	13 542	7 420	10 500	9 600	29%
<i>UE</i>	7 346	6 113	7 300	8 032	31%
Exportations farine	247	226	210	210	-7%
Total utilisé	36 435	28 201	33 416	33 039	17%
Stock final	3 028	2 341	3 678	2 862	22%

Methodology for monitoring and forecasting the production: areas, production, yields

The Céré'Obs Program

- Céré'Obs is a programme implemented by FranceAgriMer to monitor crops conditions and the progress of development stages
- Crop monitoring is carried out by field agents who report qualitative and quantitative information every week, from sowing to harvest (with a winter break).
- This allows observers in the sector to have continuous monitoring throughout the development cycle
- ... and anticipate potential constraints.



- *Website:*
<https://cereobs.franceagrimer.fr>
- *A weekly report is released every Friday at 9am*
- *Free access to the release by registering to the newsletter feed.*

Methodology for monitoring and forecasting the production: areas, production, yields

Areas and production: data from MAA (Unit for Statistics and Prospective - SSP)

Data on the surface area and production of French field crops are published and regularly revised by the MAA according to a predefined calendar each year and available on the Agreste website

Useful links:

Agreste – MAA:

<https://agreste.agriculture.gouv.fr/agreste-web/>

Calendar of official publications:

<https://agreste.agriculture.gouv.fr/agreste-web/statisticon/CALENDRIER-INDIC-CONJ/listeTypeStatisticon/>



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Infos rapides

Calendar of publications on N/N+1 (winter cereals)

	Year N	Year N+1
Jan		
Feb		
Mar		
Apr		<ul style="list-style-type: none"> • 1st estimates of spring barley planted areas
May		
Jun		<ul style="list-style-type: none"> • 1st estimates of spring barley production
Jul	 <p>Starting of the NMY</p>	<ul style="list-style-type: none"> • 1st estimates of SW, DW and winter barley production • 1st publication of NMY N+1/N+2 Cereals Balances sheets by FranceAgriMer
Aug		<ul style="list-style-type: none"> • Beg. August: Early press release on quality harvest. • Mid-August: Early publication of field quality survey on soft and durum wheat
Sep	<ul style="list-style-type: none"> • Starting of planting → Starting of Céré'Obs monitoring until harvest 	Publication of final quality of soft wheat and durum wheat
Oct		Publication Qu@litalim of feed barley
Nov		
Dec	<ul style="list-style-type: none"> • 1st estimates of planted areas of soft wheat, durum wheat, winter barley 	

Thank you!

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