



# EU Cereals Market

**Committee for the Common Organisation  
of Agricultural Markets**

**28<sup>th</sup> February 2019**



# 2018/19 Marketing Year

## Cereals

# EU 28 Cereals Balance Sheet

Thousand metric tonnes

LAST UPDATED: 28/02/2019	2018/19 (estimate)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
<b>Beginning stocks</b>	17.214	4.222	2.371	20 103	553	367	412	1.116	919	47 278
Usable production	128.733	56.145	8.664	69.052	6.158	804	7.632	9.757	3.575	290.520
Area (thousand ha)	23.065	12.277	2.475	8.293	1.948	152	2.742	2.630	1.536	55.118
Yield (tonnes/ha)	5,6	4,6	3,5	8,3	3,2	5,3	2,8	3,7	2,3	5,3
Imports (from third countries)	4.500	200	1.300	20.000	500	400	4		163	27.067
<b>Total supply</b>	<b>150.447</b>	<b>60.567</b>	<b>12.335</b>	<b>109.154</b>	<b>7.211</b>	<b>1.571</b>	<b>8.049</b>	<b>10.873</b>	<b>4.658</b>	<b>364.865</b>
Total domestic use	118.982	46.972	9.664	81.282	6.573	875	7.723	9.887	4.485	286.442
Human consumption	48.134	363	8.056	4.879	3.000	156	1.152	52	23	65.815
Seed	4.787	2.131	473	402	403	29	450	500	70	9.244
Industrial uses	11.165	9.078	95	12.400	1.300		102	445	102	34.686
of which bioethanol/biofuel	4.665	437		6.500	700			344	14	12.659
Animal feed	53.997	35.000	1.000	63.000	1.800	690	5.950	8.800	4.250	174.487
Losses	900	400	40	600	70		70	90	40	2.210
Exports (to third countries)	18.000	7.500	1.000	2.000	200	3	208	2	8	28.920
<b>Total use</b>	<b>136.982</b>	<b>54.472</b>	<b>10.664</b>	<b>83.282</b>	<b>6.773</b>	<b>877</b>	<b>7.931</b>	<b>9.889</b>	<b>4.492</b>	<b>315.363</b>
<b>Ending stocks**</b>	<b>13.465</b>	<b>6.095</b>	<b>1.671</b>	<b>25.872</b>	<b>438</b>	<b>694</b>	<b>117</b>	<b>984</b>	<b>165</b>	<b>49.502</b>
<b>Change in stocks**</b>	<b>-3.749</b>	<b>1.873</b>	<b>-700</b>	<b>5.770</b>	<b>-116</b>	<b>327</b>	<b>-295</b>	<b>-132</b>	<b>-754</b>	<b>2.224</b>

\* Marketing year: from July to June

\*\* At the end of the marketing year



## EU BALANCE SHEET 2018/19

- Production forecast : below average (290,5 million tonnes, - 4,8% y/y)
  - + Floods and Drought impact
  - + Soft wheat and barley: respectively - 9% and -4% y/y
  - + Maize : + 7% y/y
- Record of the total imports, in particular for maize
- Decrease of the total exports y/y : 4.6 million tonnes
- Slight increase of ending stocks



# 2019/20 Marketing Year

## Cereals

## EU 28- 2019 Area Forecast

EVOLUTION OF THE EU CEREALS AREA				
Million ha	2017	2018	2019 Feb fcst	% change 2018/2019
<b>TOTAL</b>	<b>55,2</b>	<b>55,1</b>	<b>56,0</b>	1,7
Soft wheat	23,4	23,1	23,9	3,7
Durum wheat	2,5	2,5	2,4	-1,7
Barley	12,0	12,3	12,3	-0,1
Maize	8,3	8,3	8,7	4,8
Rye	2,0	1,9	2,0	4,7
Oats	2,7	2,7	2,7	-3,0

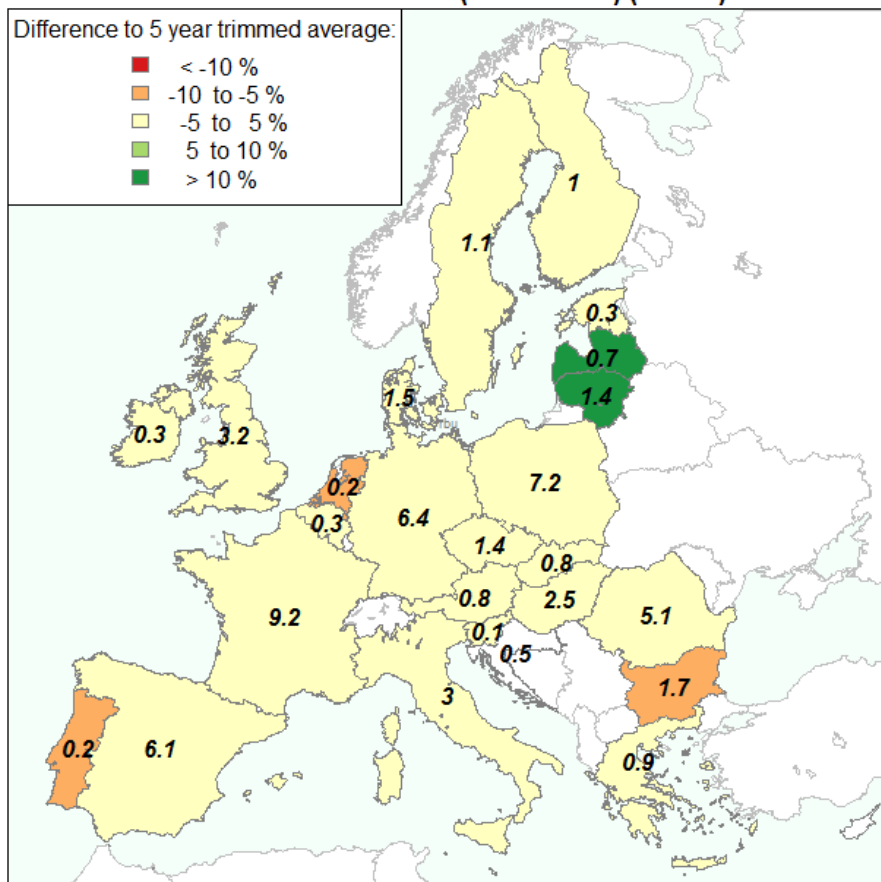
Sources : DG AGRI - G4



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# 2019-20 MY vs 5Y average

All cereals area 2019 ( million ha ) (f'cast.)



Calculations and cartography: European Commission DG-AGRI G4 2019-02-23 © EuroGeographics for the administrative boundaries

EU28 area : 56 ( million ha ) Difference to 5 year trimmed average: -1 %

## EU 28- 2019 Production Forecasts

EVOLUTION OF THE EU CEREALS USABLE PRODUCTION				
Million tonnes	2017/2018	2018/2019	2019/2020 Feb fcst	% change 2018/2019
<b>TOTAL</b>	<b>305,3</b>	<b>290,5</b>	<b>308,1</b>	6,1
Soft wheat	142,0	128,7	140,8	9,4
Durum wheat	8,7	8,7	8,3	-4,6
Barley	58,3	56,1	60,2	7,3
Maize	64,8	69,1	68,4	-1,0
Rye	7,2	6,2	7,9	27,4
Oats	8,1	7,6	8,0	5,3

Sources : DG AGRI - G4



# EU 28- 2019 Production Forecasts

## 2019/2020 Marketing Year *usable production*

Million tonnes	<b>EC DG AGRI 28-févr</b>	Stratégie Grain 17-févr
<b>Total</b>	<b>308,1</b>	310,5
Soft Wheat	<b>140,8</b>	146,4
Durum Wheat	<b>8,3</b>	8,0
Barley	<b>60,2</b>	62,0
Maize	<b>68,4</b>	65,0
Rye	<b>7,9</b>	7,5

# EU 28 - 2019 Production Forecast

Most important producers  
(80% of EU production)  
total cereals prod changes 2018/2019

FR	1,5%
DE	19,2%
PL	8,0%
IT	6,6%
UK	8,4%
ES	-9,4%
HU	2,9%
RO	-13,8%

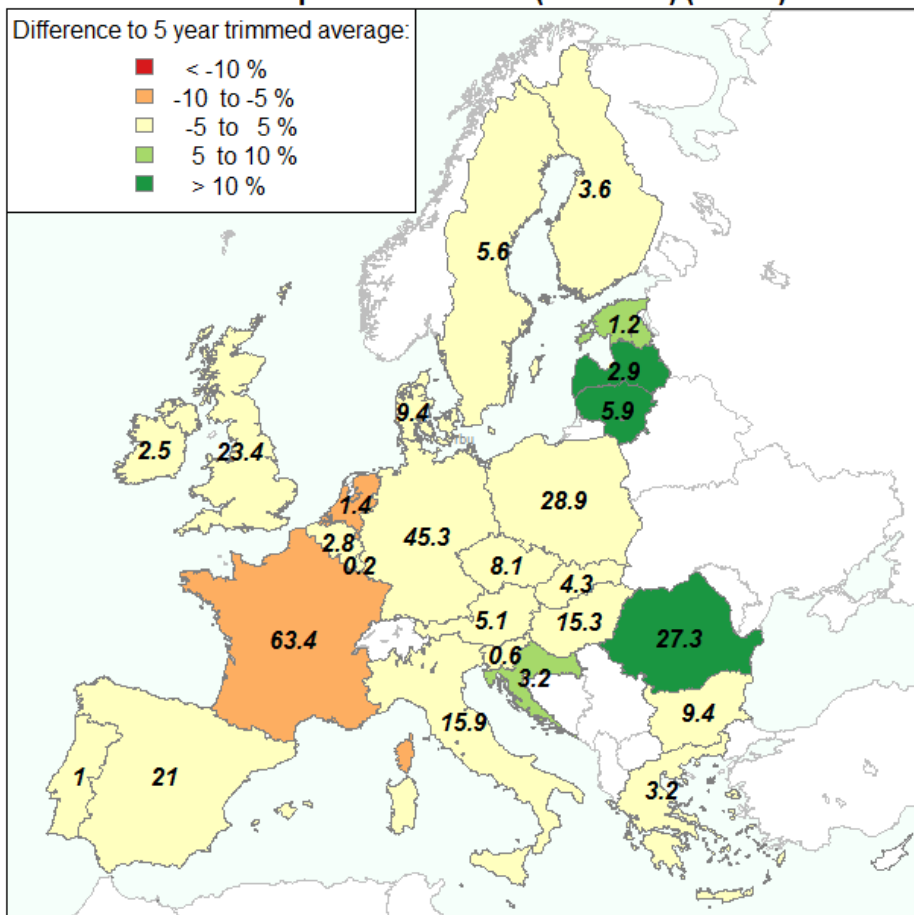
Sources : DG AGRI - G4



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# 2019-20 MY vs 5Y average

All cereals production 2019 ( million t ) (f'cast.)



Calculations and cartography: European Commission DG AGRI G4 2019-02-23 © EuroGeographics for the administrative boundaries

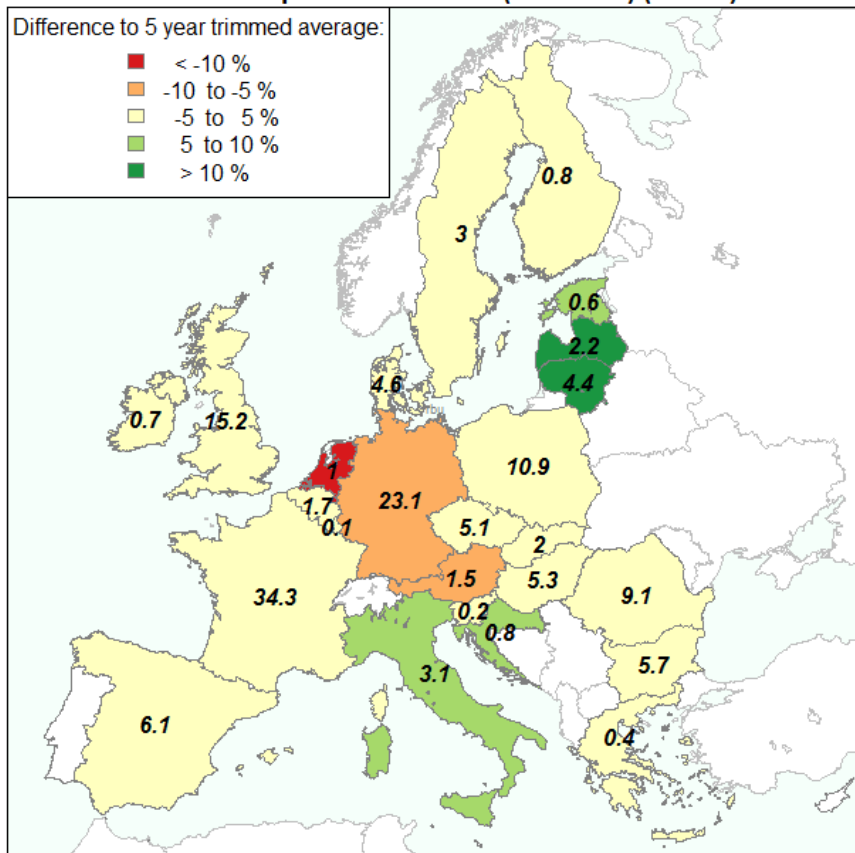
EU28 production : 308.1 ( million t ) Difference to 5 year trimmed average: 1 %



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# 2019-20 MY vs 5Y average

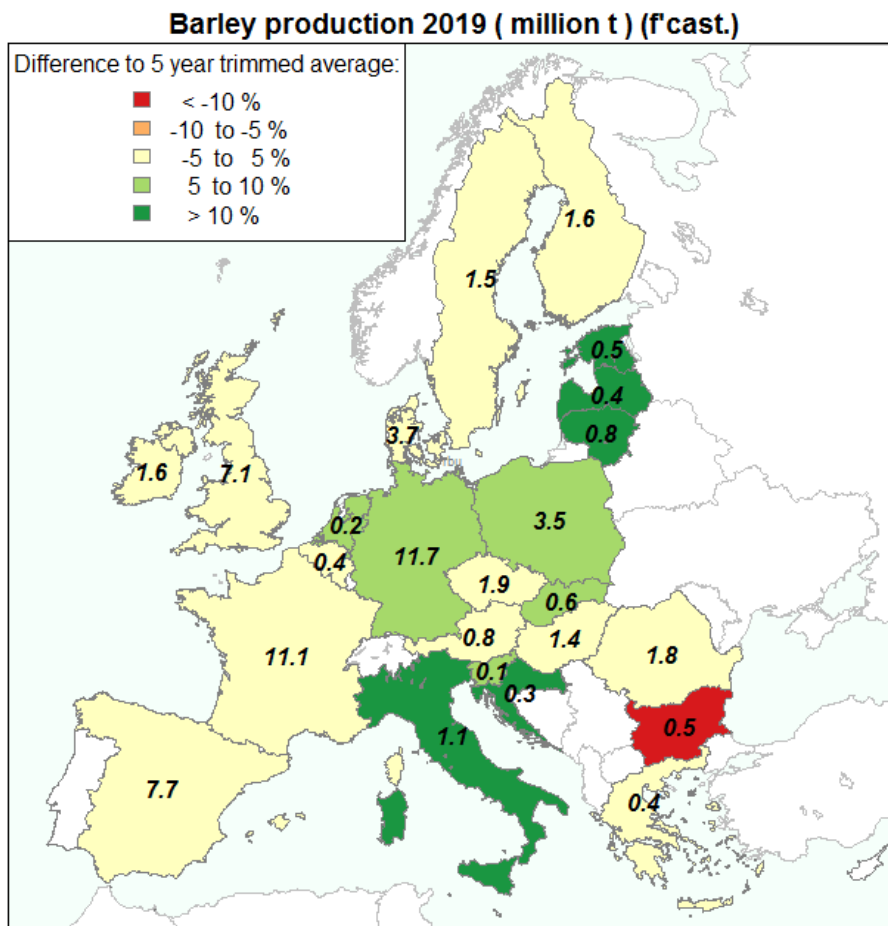
Soft wheat production 2019 ( million t ) (f'cast.)



EU28 production : 140.8 ( million t ) Difference to 5 year trimmed average: 0 %

Calculations and cartography: European Commission DG AGRI 04 2019-02-23 © EuroGeographics for the administrative boundaries

# 2019-20 MY vs 5Y average

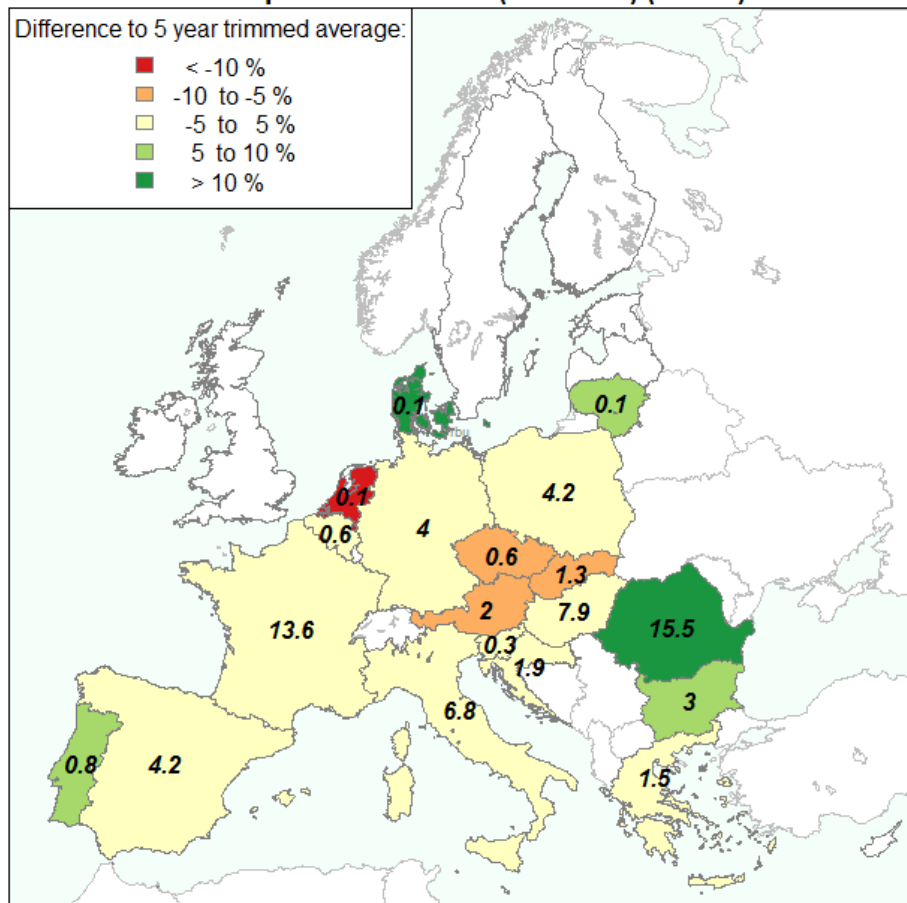


Calculations and cartography: European Commission DG AGRI G4 2019-02-23 © EuroGeographics for the administrative boundaries

EU28 production : 60.2 ( million t ) Difference to 5 year trimmed average: 1 %

# 2019-20 MY vs 5Y average

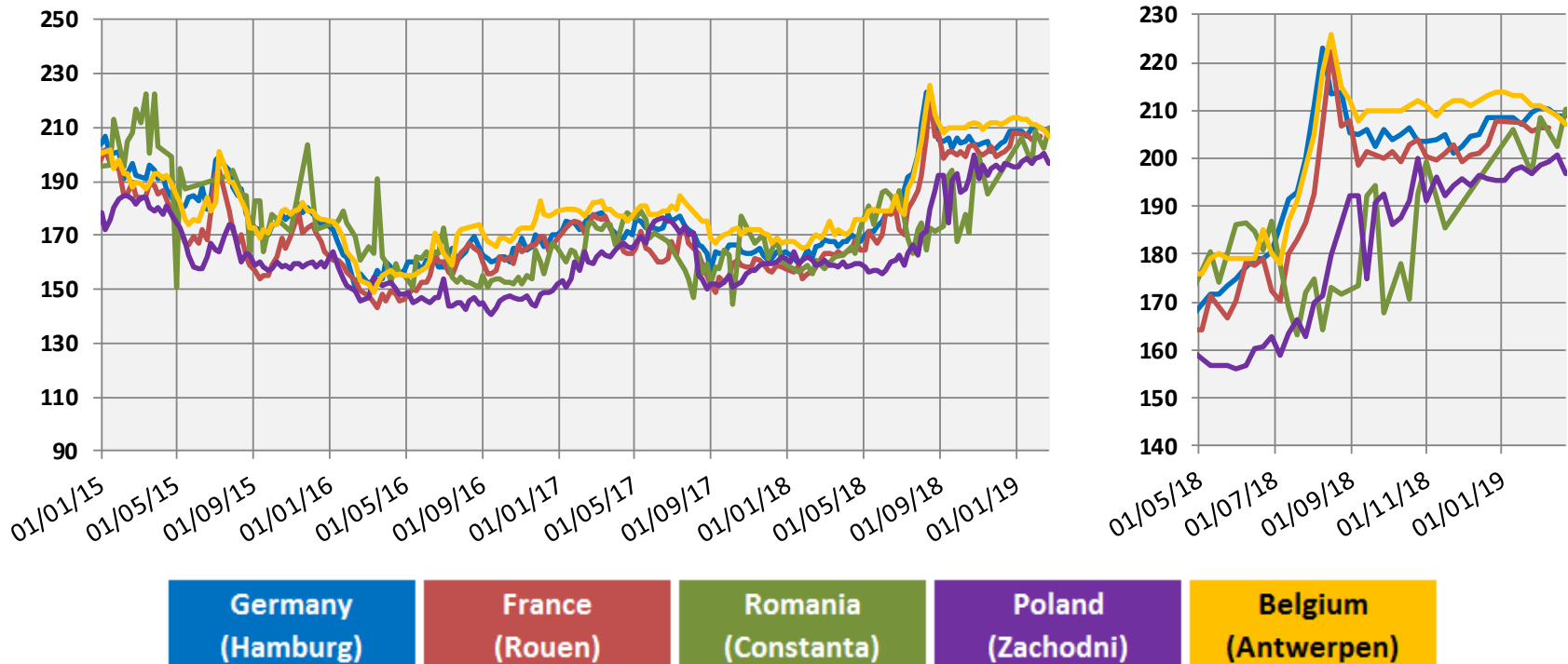
Maize production 2019 ( million t ) (f'cast.)



Calculations and cartography: European Commission DG-AGRI G4 2019-02-23 © EuroGeographics for the administrative boundaries

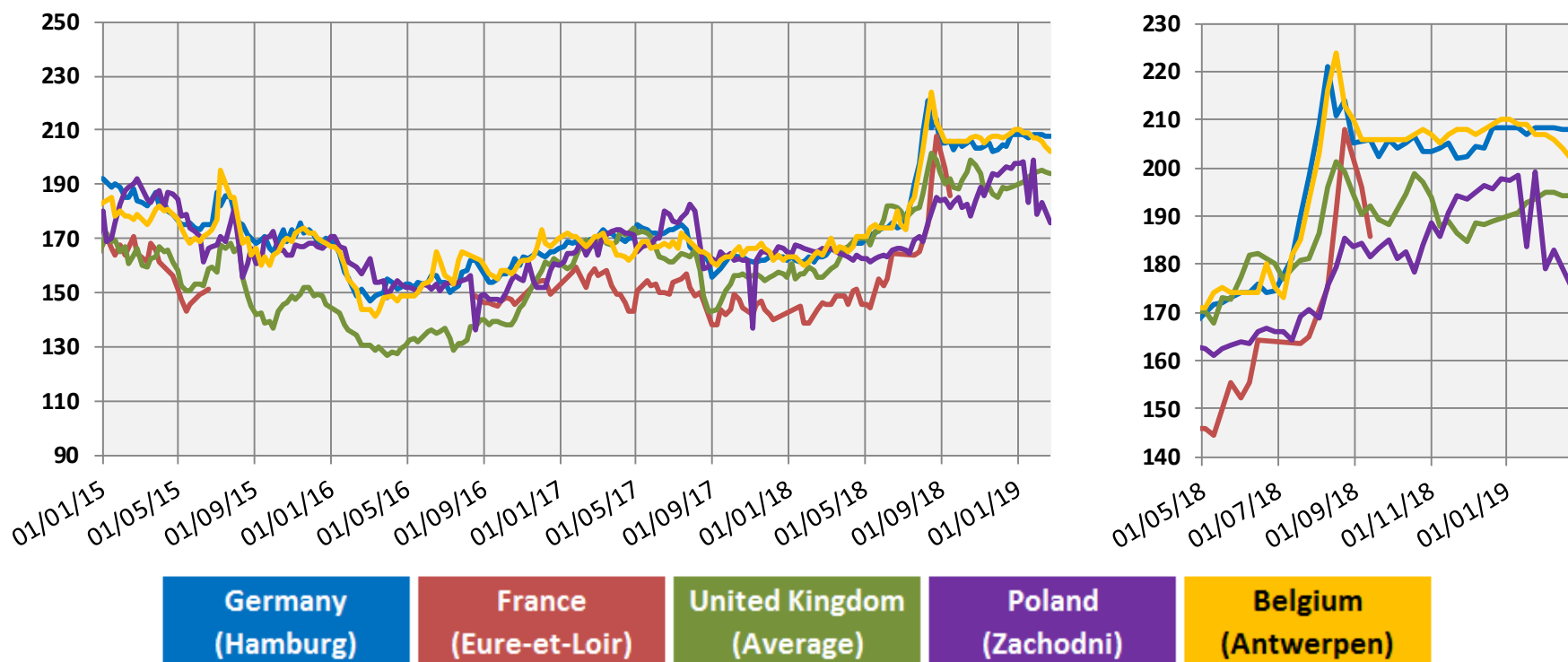
EU28 production : 68.4 ( million t )    Difference to 5 year trimmed average: 4 %

## EU Market prices for milling wheat (€/tonne)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

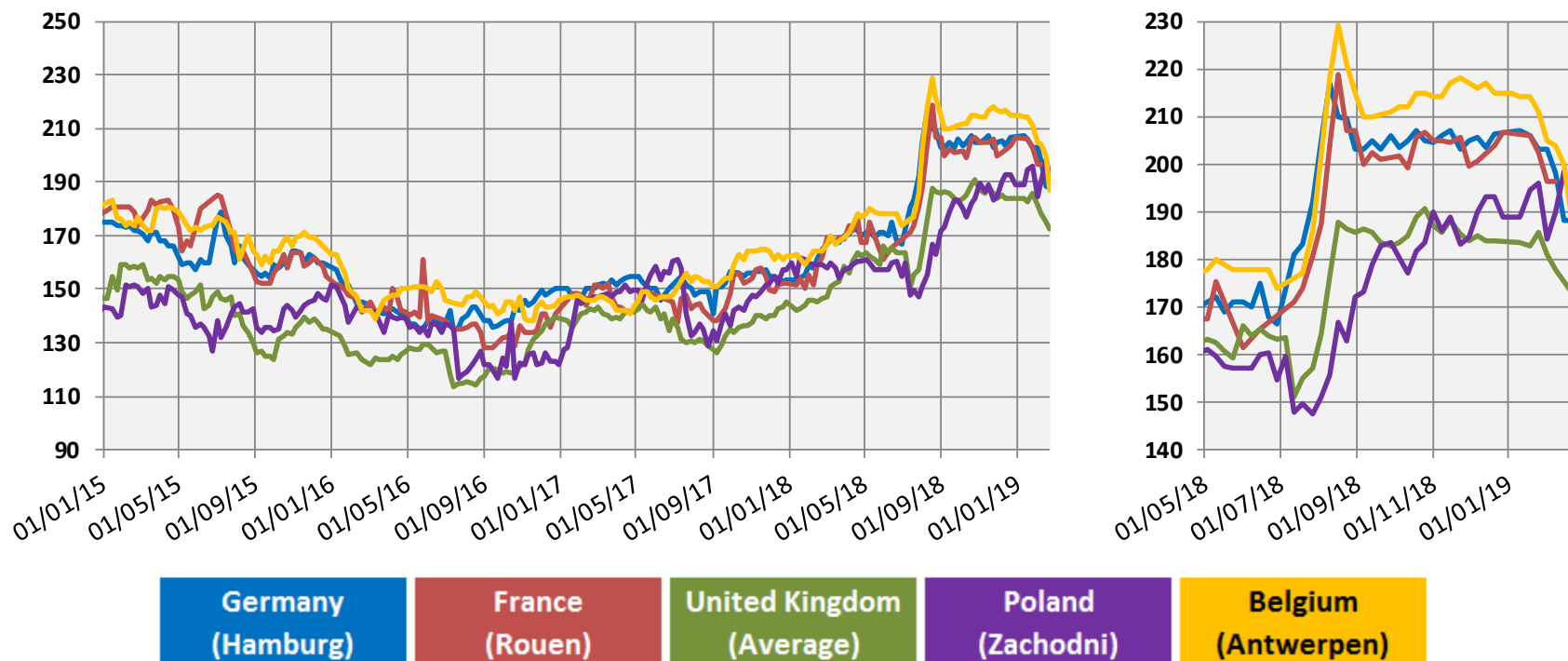
## EU Market prices for feed wheat (€/tonne)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

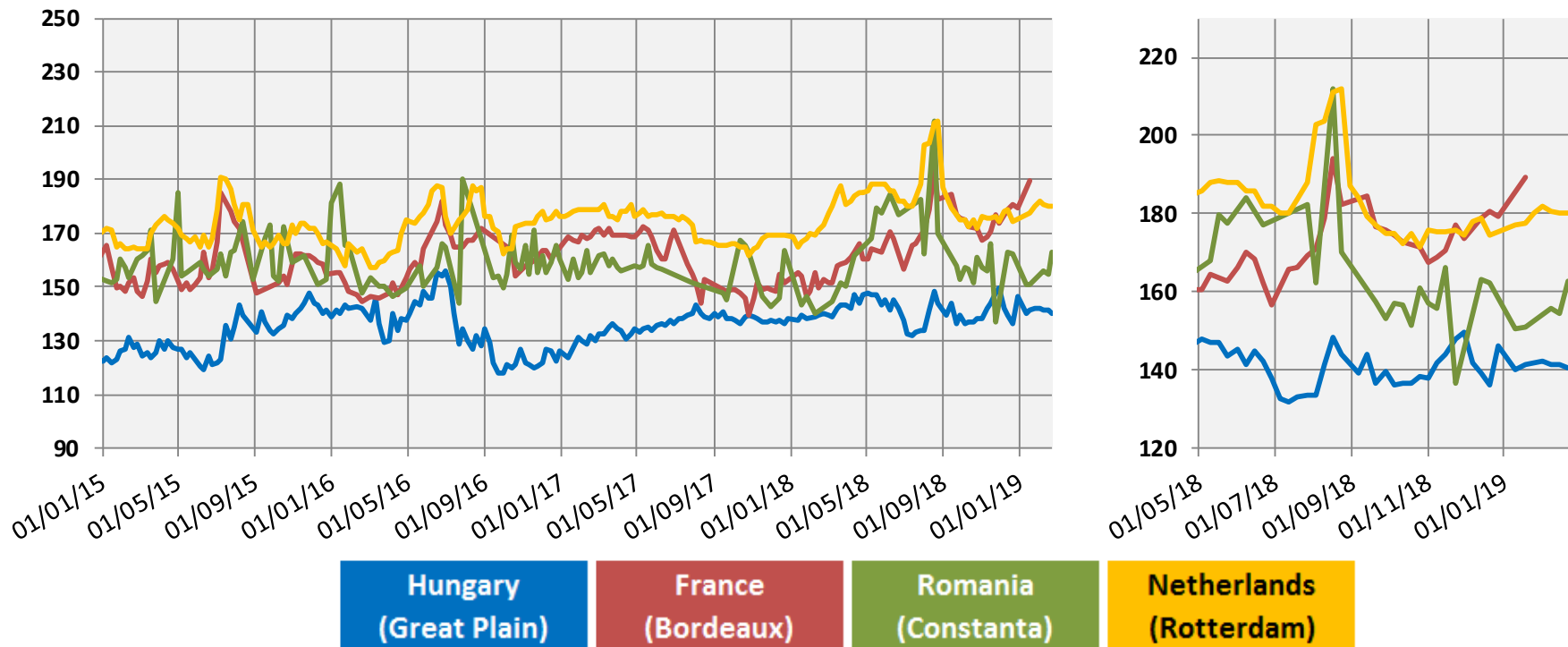


## EU Market prices for feed barley (€/tonne)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

## EU Market prices for maize (€/tonne)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1



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# EU 28 Cereals Balance Sheet

Thousand metric tonnes

LAST UPDATED: 28/02/2019	2019/20 (forecast)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
<b>Beginning stocks</b>	<b>13.465</b>	<b>6.095</b>	<b>1.671</b>	<b>25.872</b>	<b>438</b>	<b>694</b>	<b>117</b>	<b>984</b>	<b>165</b>	<b>49.502</b>
Usable production	140.786	60.209	8.296	68.377	7.852	737	7.953	10.407	3.469	308.086
<i>Area (thousand ha)</i>	<i>23.909</i>	<i>12.262</i>	<i>2.432</i>	<i>8.693</i>	<i>2.039</i>	<i>140</i>	<i>2.661</i>	<i>2.540</i>	<i>1.358</i>	<i>56.034</i>
<i>Yield (tonnes/ha)</i>	<i>5,9</i>	<i>4,9</i>	<i>3,4</i>	<i>7,9</i>	<i>3,9</i>	<i>5,3</i>	<i>3,0</i>	<i>4,1</i>	<i>2,6</i>	<i>5,5</i>
Imports (from third countries)	3.379	237	1.726	15.465	80	252	4		161	21.304
<b>Total supply</b>	<b>157.630</b>	<b>66.542</b>	<b>11.693</b>	<b>109.714</b>	<b>8.370</b>	<b>1.684</b>	<b>8.075</b>	<b>11.390</b>	<b>3.795</b>	<b>378.892</b>
Total domestic use	118.982	46.972	9.664	81.482	6.573	875	7.723	9.887	3.735	285.892
Human consumption	48.134	363	8.056	4.879	3.000	156	1.152	52	23	65.815
Seed	4.787	2.131	473	402	403	29	450	500	70	9.244
Industrial uses	11.165	9.078	95	12.400	1.300		102	445	102	34.686
<i>of which bioethanol/biofuel</i>	<i>4.665</i>	<i>437</i>		<i>6.800</i>	<i>700</i>			<i>344</i>	<i>14</i>	<i>12.959</i>
Animal feed	53.997	35.000	1.000	63.200	1.800	690	5.950	8.800	3.500	173.937
Losses	900	400	40	600	70		70	90	40	2.210
Exports (to third countries)	25.494	8.824	1.143	2.588	154	3	207	2	8	38.422
<b>Total use</b>	<b>144.476</b>	<b>55.796</b>	<b>10.807</b>	<b>84.070</b>	<b>6.727</b>	<b>877</b>	<b>7.930</b>	<b>9.889</b>	<b>3.742</b>	<b>324.315</b>
<b>Ending stocks**</b>	<b>13.155</b>	<b>10.745</b>	<b>886</b>	<b>25.644</b>	<b>1.642</b>	<b>806</b>	<b>145</b>	<b>1.501</b>	<b>53</b>	<b>54.578</b>
Change in stocks**	-311	4.650	-785	-228	1.205	112	28	517	-113	5.076

\* Marketing year: from July to June

\*\* At the end of the marketing year



## EU BALANCE SHEET 2019/20

- First Production forecast : slightly above average (308,1 million tonnes, + 6% y/y) based on:
  - + Areas communicated by Member States
  - + Yield trend
- Increase of total EU cereal area (56 million ha, 1,7% y/y)
- Increase of the total exports
- Increase of ending stocks



**Thank you for your attention!**

**Market data the for cereals, oilseeds and protein crops are available at the EU Crops Market Observatory .**

**<https://ec.europa.eu/agriculture/market-observatory/crops>**