



**Intercéréales**  
FRANCE

# FRENCH CEREALS OUTLOOK

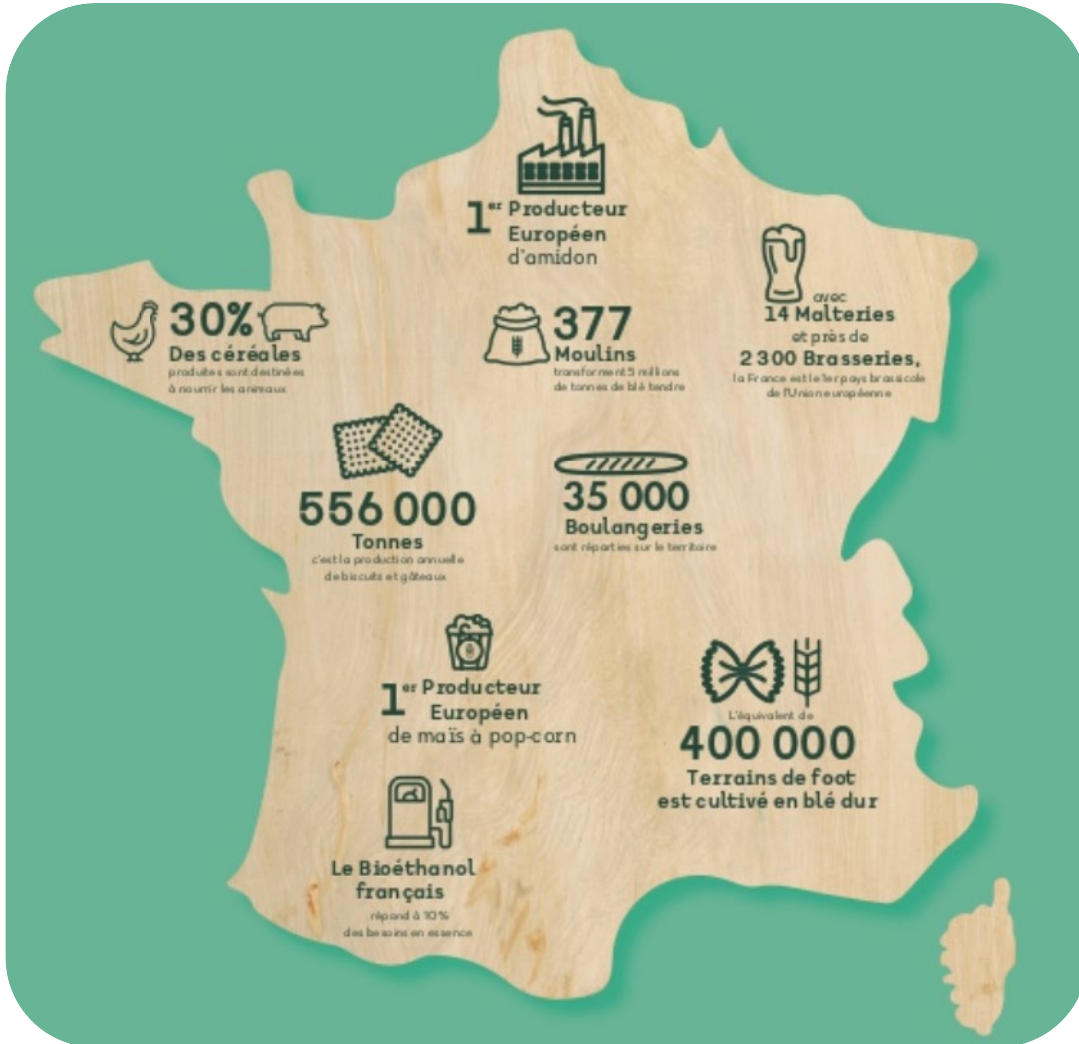
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**Roland GUIRAGOSSIAN**

Iran Grain Conference 10-11 May 22

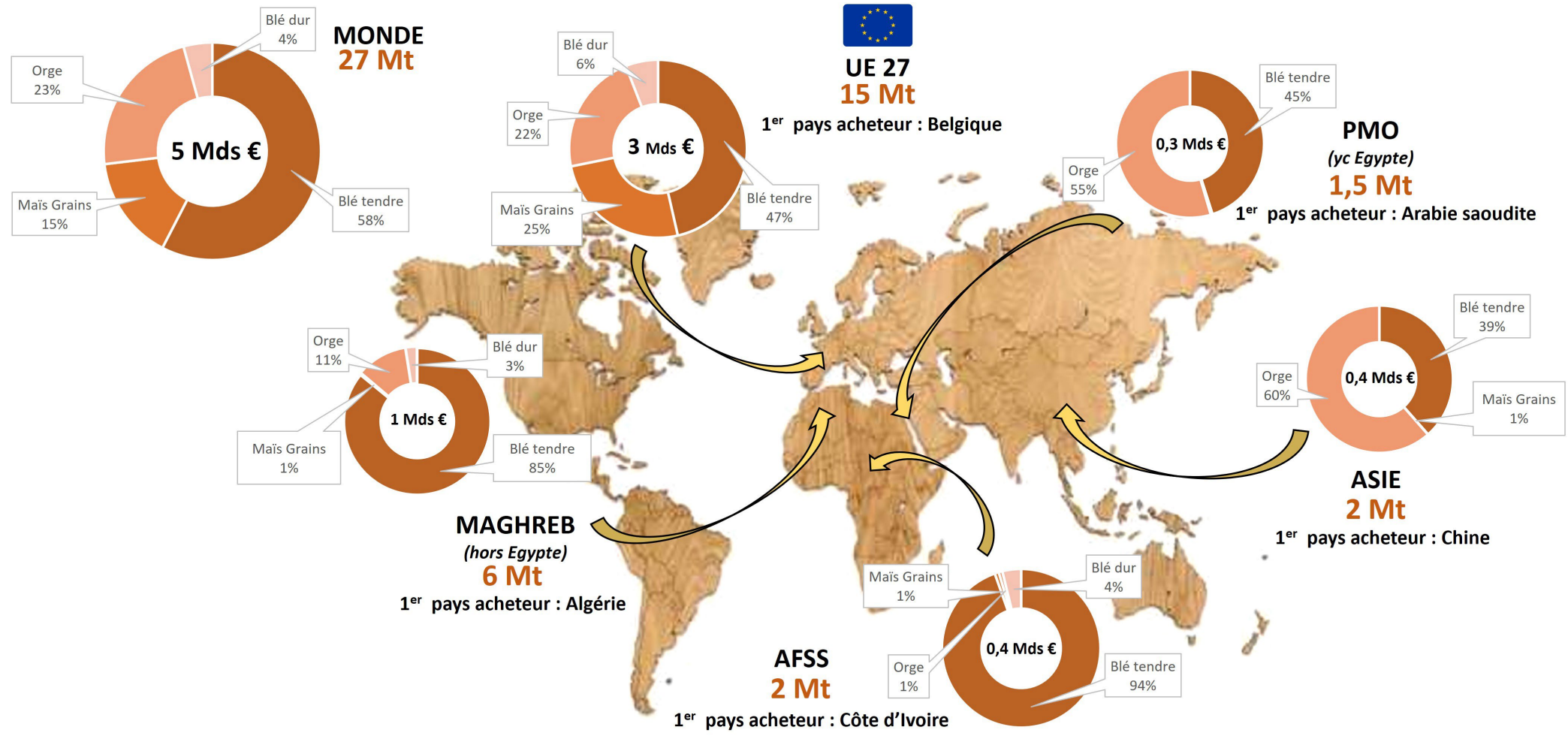
- ▶ Intercereales is the professional organization of the French Cereals Industry
  - Non-profit organization funded by the producer's , traders , cooperatives and elevators company contributions
  - Product scope : cereals
  - Throughout the cereals supply chain: from production to first processing, including collection and marketing : regroups 14 associations and 3 congregations (Producers, Traders, Coops etc..)
  - Recognized by the French public authorities since 2003
  - In charge of the development of the French cereal sector, for the benefit of all the actors in the chain :
    - Support Cereals applied research, innovation and performance by funding the Arvalis R&D Institute
    - Promote and communicate on French Cereals in the world
  
- ▶ Place of dialogue between all the different actors of the sector

# The French Cereals Industry summarized in a few figures...



- ▶ **9 cereals** are produced in France : Milling Wheat, Corn, Barley, Triticale, Durum Wheat, Oats , Sorghum, Rye & Rice
- ▶ **16% of the territory** , equivalent to 11 millions hectares cultivated (5% in organic)
- ▶ **240 000 Farms, 550 Cooperatives and Trading companies , 1 000 first processing Companies**
- ▶ **450 000 people employed**
  - ▶ 45% in farms and agricultural supplies
  - ▶ 3% in grain collection, storage and marketing
  - ▶ 7% in first processing
  - ▶ 45% in the 2<sup>de</sup> processing (*not included in Intercereales*)

# What are the French Cereals destinations in the world?



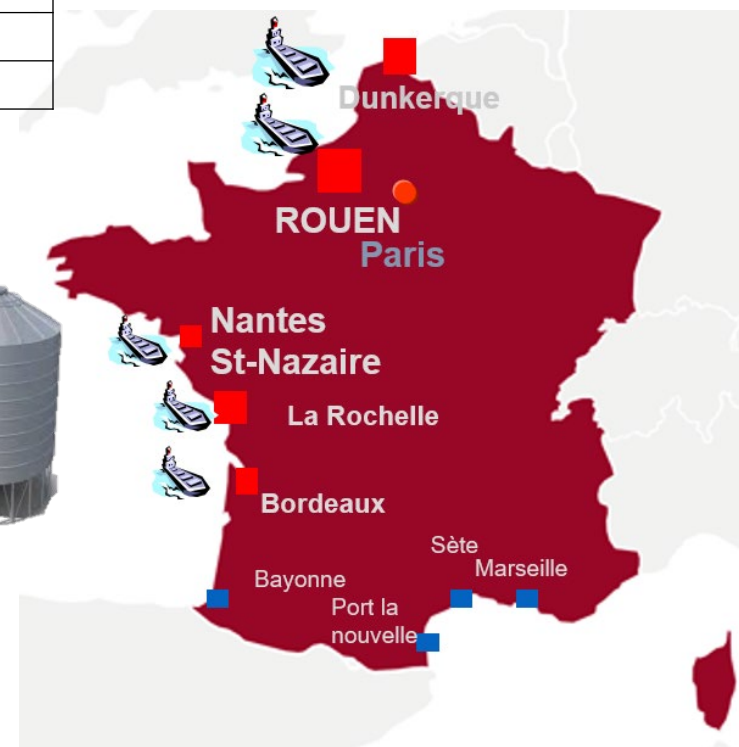
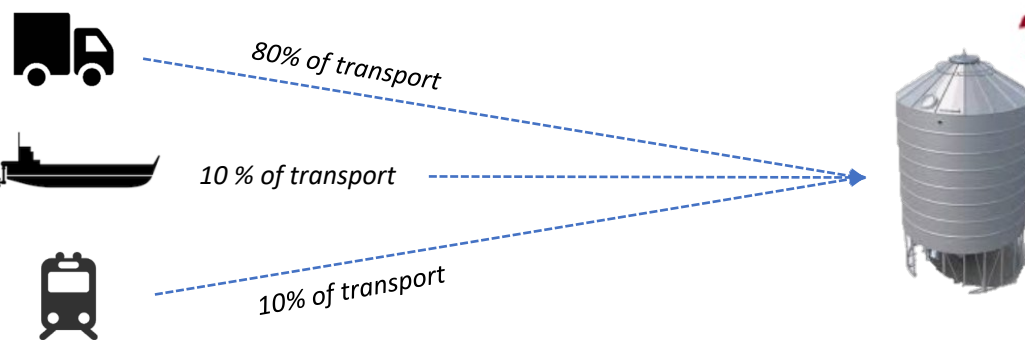
A total of **27 million tons** and **5 billion euros** each year

# THE GRAIN LOGISTICS IN FRANCE

## French ports

Ports	Grain export volume (in Mt)	Storage capacity (in Mt)	Maxi tonnage per Vessel (in tons)
<b>Rouen</b>	<b>5-6</b>	<b>0.900</b>	<b>50 000</b>
<b>La Rochelle</b>	<b>2-3</b>	<b>0.440</b>	<b>100 000</b>
<b>Dunkerque</b>	<b>3-4</b>	<b>0.450</b>	<b>90 000</b>
<b>Bordeaux</b>	<b>1.1-1.3</b>	<b>0.455</b>	<b>40 000</b>
<b>Nantes</b>	<b>1.1</b>	<b>0.178</b>	<b>60 000</b>

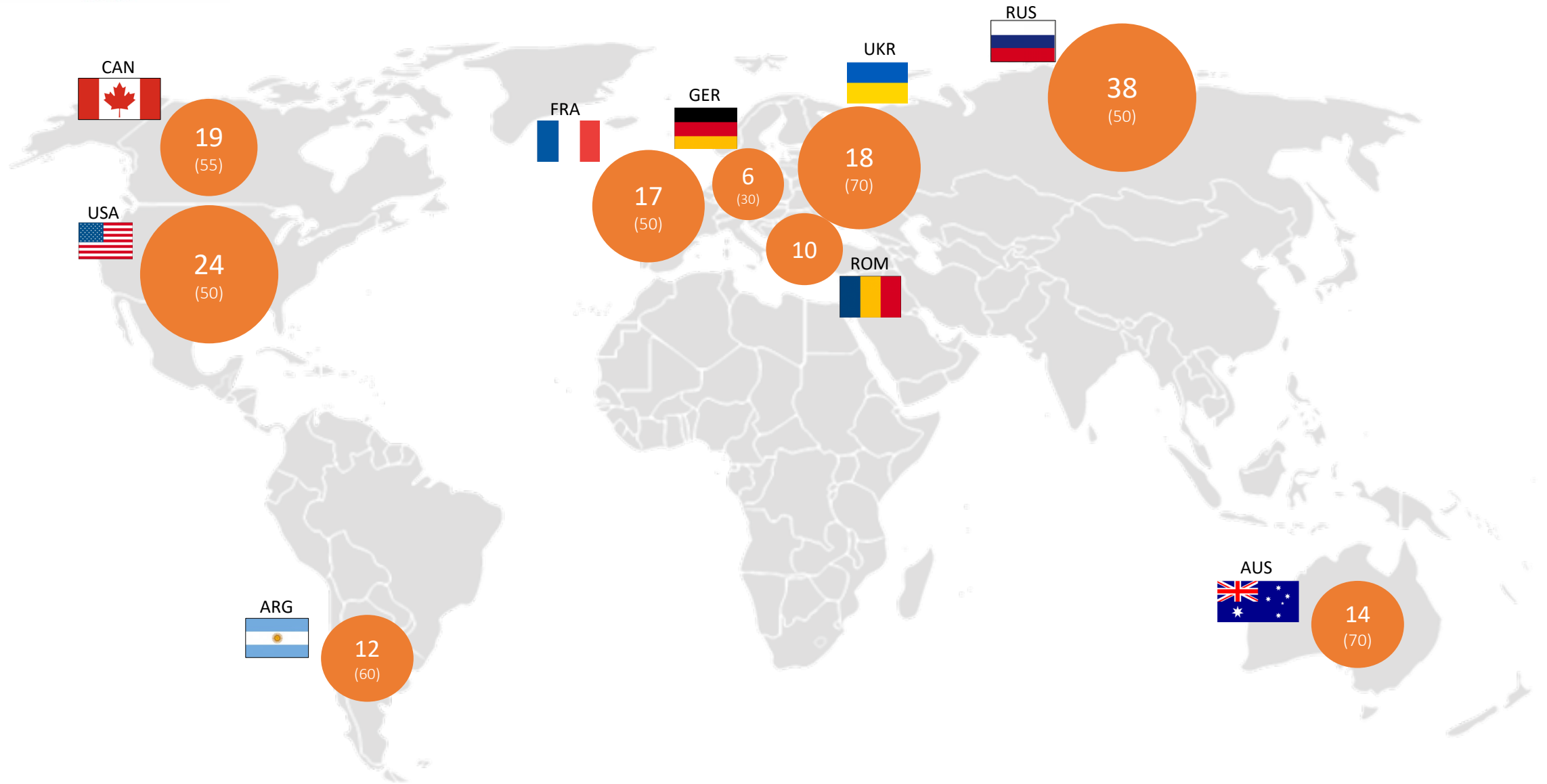
Storage capacity (w/o farm storage) : 60 Mt



# Wheat



# MAIN EXPORTERS OF WHEAT (Volume in Mt)



(%) : share of exported volume in local production

Average 2017-2021

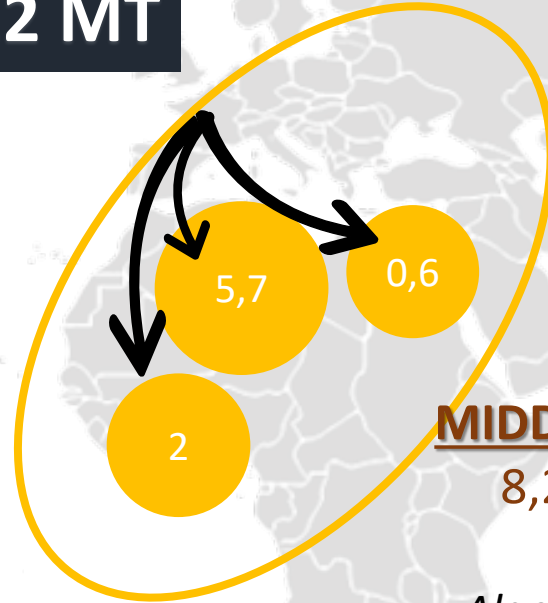
# SUPPLY & DEMAND - FRENCH WHEAT

	Average 2018-2021	2020/21	<b>Forecast 2021/22</b>
<i>Area (kha)</i>	4 716	4 267	<b>4 983</b>
<i>Yield (t/ha)</i>	7.2	6.8	<b>7.1</b>
<b>PRODUCTION (Mt)</b>	<b>34.3</b>	<b>29.2</b>	<b>35,5</b>
➤ <b>Domestic uses (Mt)</b>	14.7	14.4	<b>14.7</b>
➤ <b>Exports (Mt)</b>	<b>17.2</b>	<b>13.7</b>	<b>17.7</b>



# FRANCE : MEDITERRANEAN AND AFRICAN OPENINGS

17,2 MT



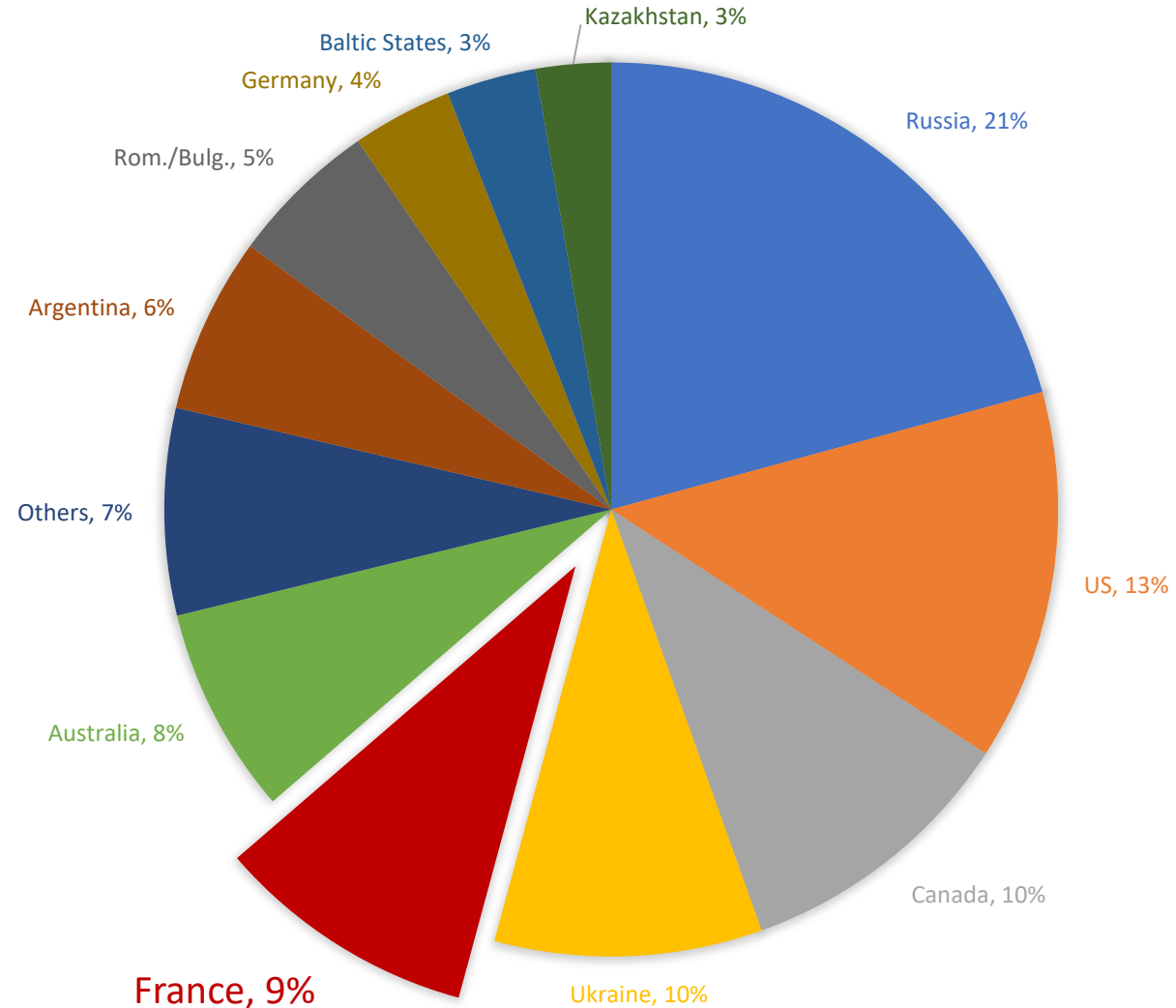
**MIDDLE EAST & AFRICA :**  
8,2 Mt EVERY YEAR

*Algeria, Morocco, Tunisia  
Western sub-Saharan Africa  
Egypt, Middle East*

AND :

- *European Union : 7 Mt*
- *Cuba : 350 kt*
- *China : 2.2 Mt*

# FRANCE : 5TH LARGEST WHEAT EXPORTER IN THE WORLD



Moyenne 2017-2021

# Barley



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Production 2021

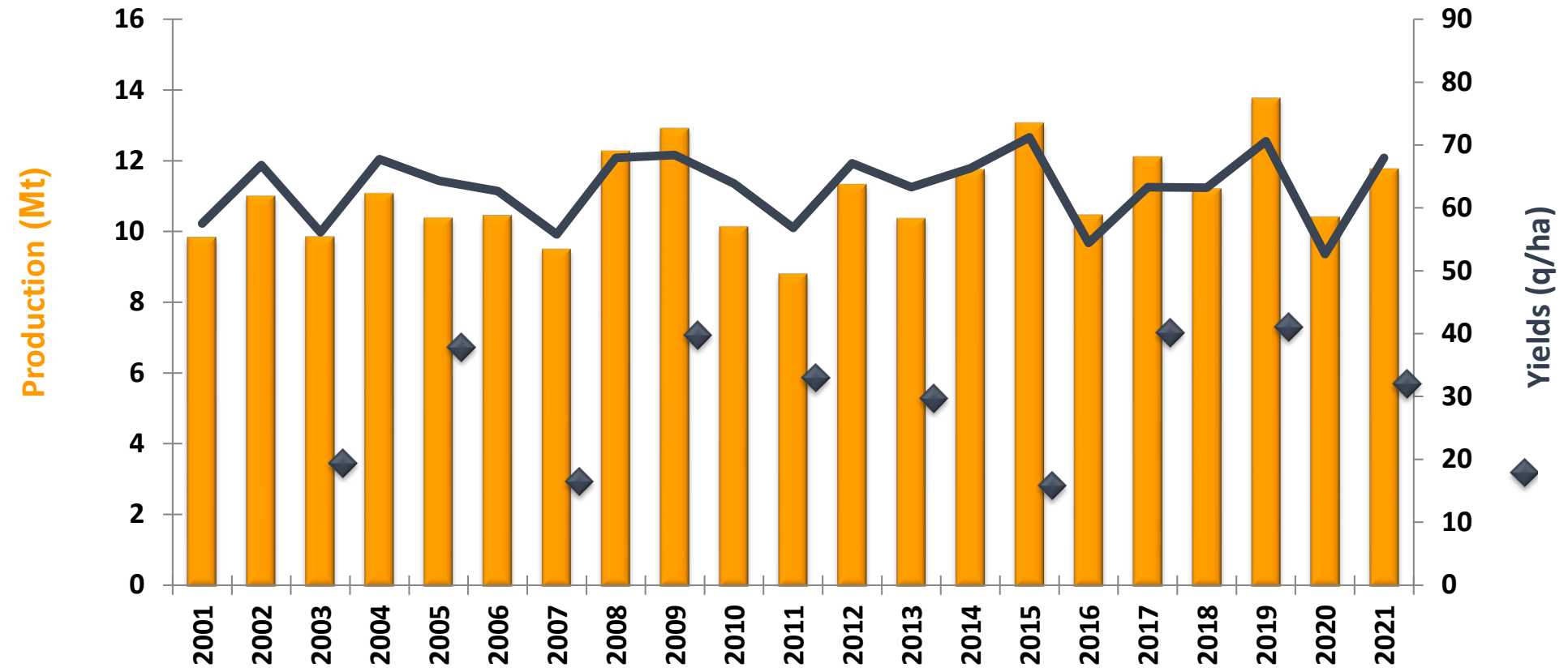
Area covered: 1,7 Mha (-14% /2020)

Yields : 6.8 t/ha (+23% /2020)

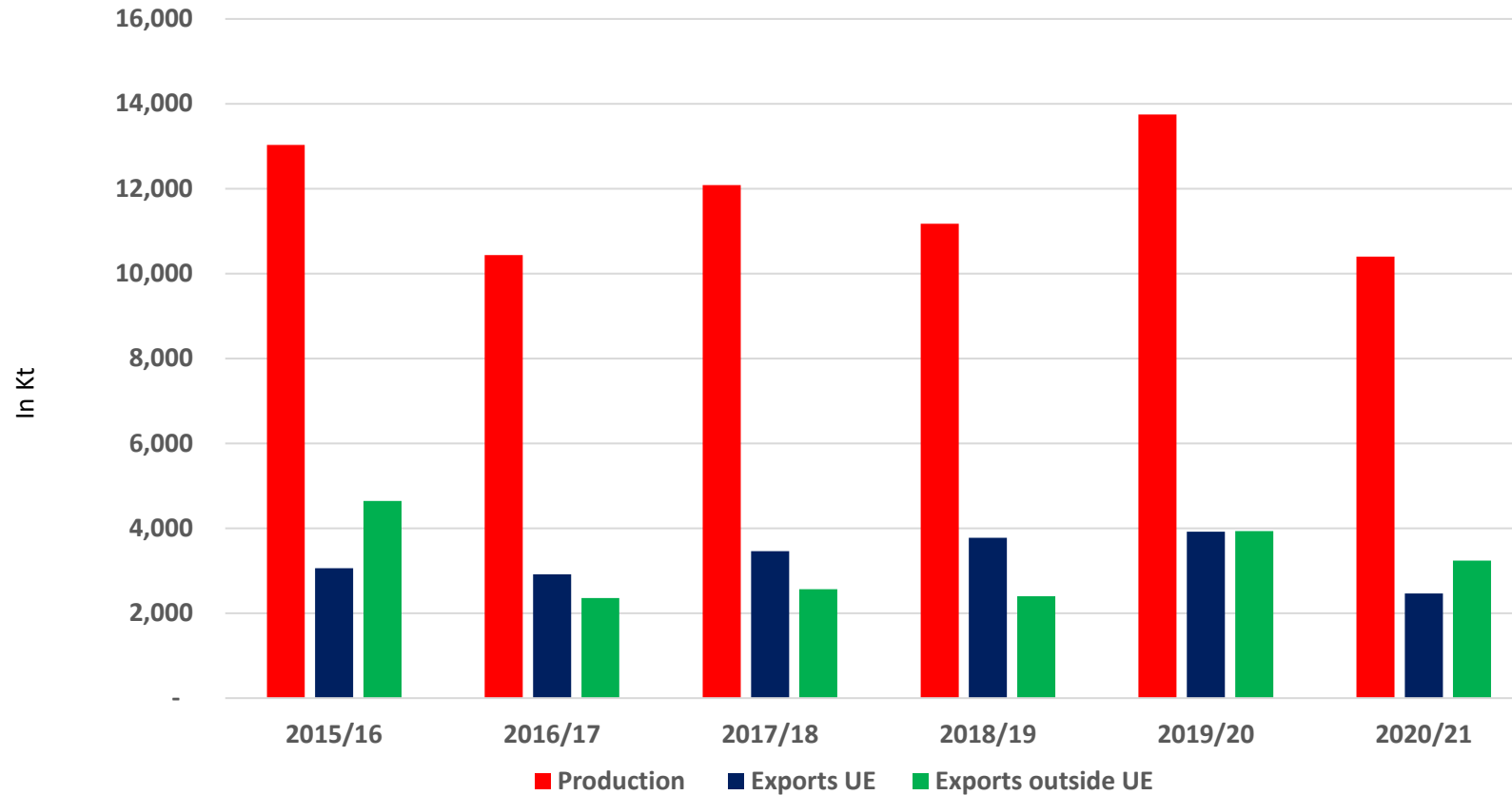
Production : 11,7 Mt (+12% /2020)

# FRENCH BARLEY: KEY FIGURES

## FRENCH BARLEY YIELD & PRODUCTION TRENDS SINCE 2001



# French Barley Exports

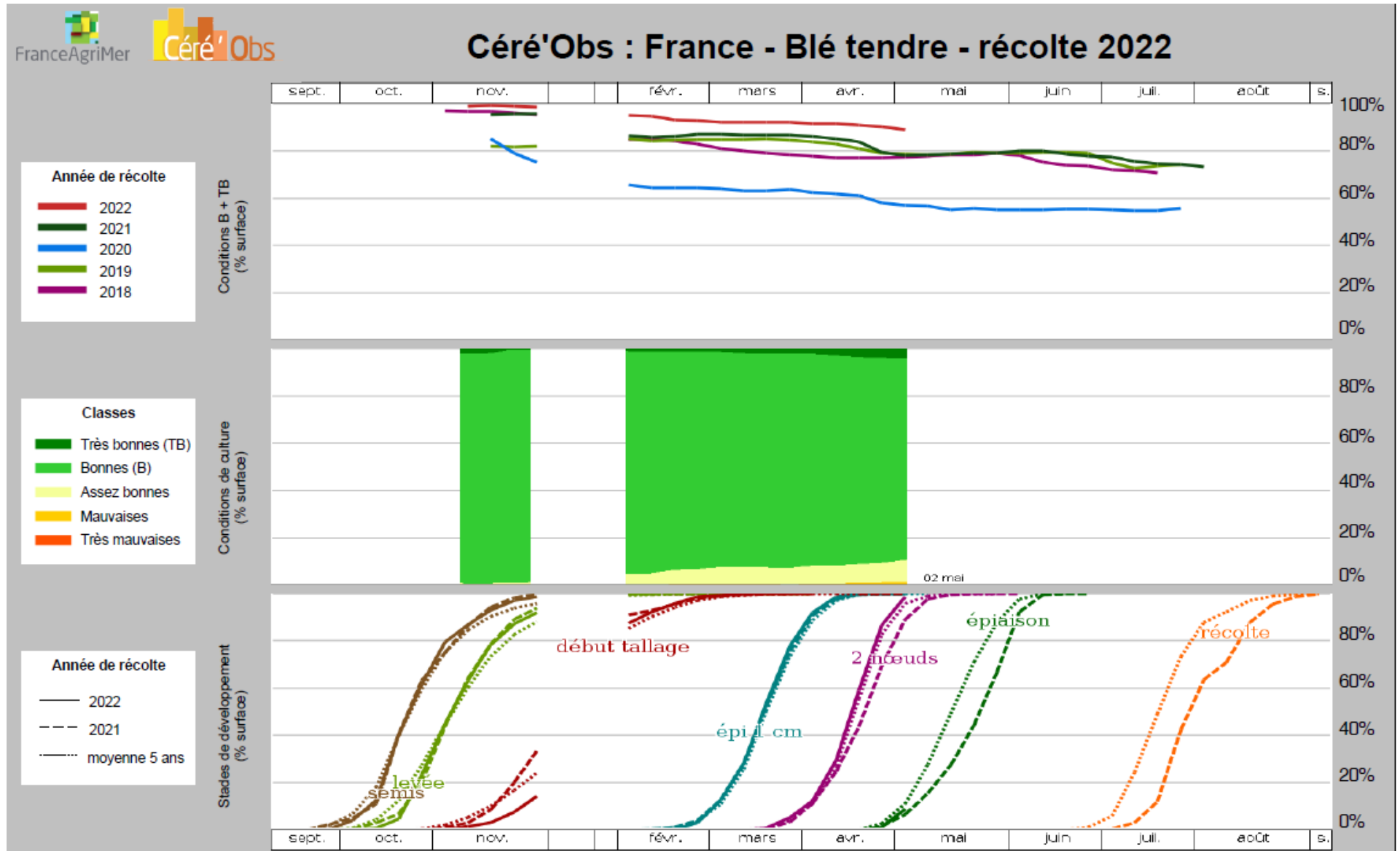


- Main destinations outside UE : China (2.9 MT in 20/21 & 2.1 MT YTD 21/22) , Morocco, Turkey, Columbia, Mexico etc..

# 2022 production status

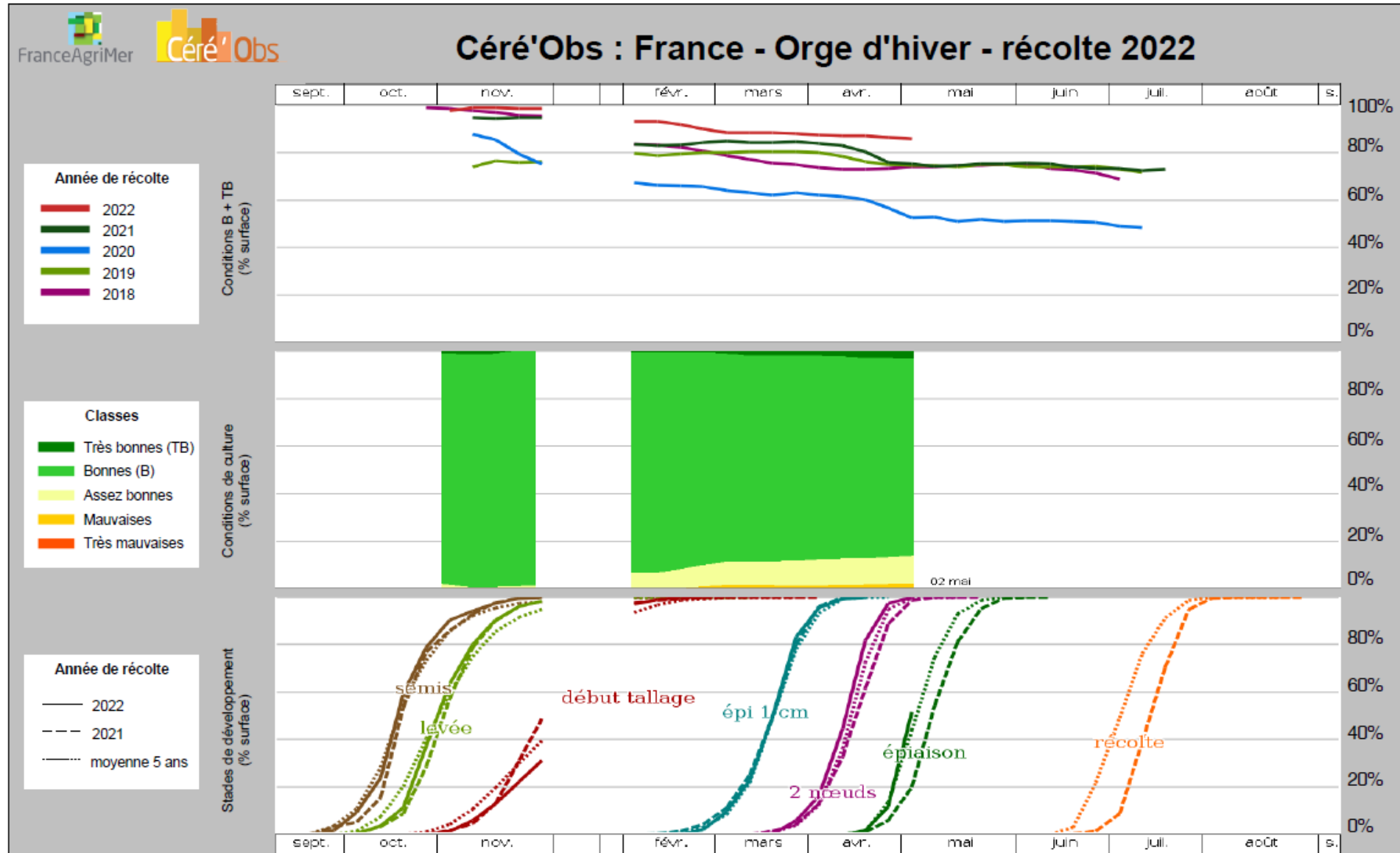


# French Milling Wheat '22 production follow-up



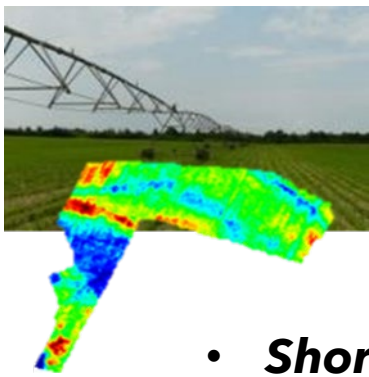
- Milling Wheat sowing area for 2022 production : 4.745 M/ Hectares

# French Barley '22 production follow-up



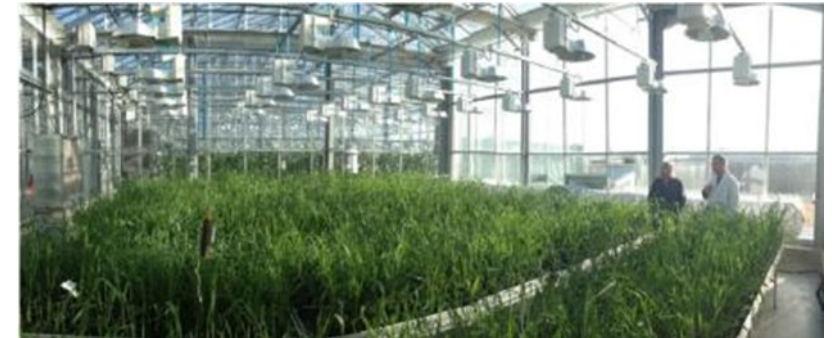
- Barley sowing area for 2022 production : 1.252 M/Hectares





# Main challenges ahead

- **Short Term :**
  - Increasing cost of fertilizers ,inputs and energy
  - Price instability
  - Cost of fret
- **Middle & Long Term :**
  - How to produce more with less inputs ,pesticides etc... (U.E. new environment perspective for Agriculture)
  - How to store the product without chemical treatment
  - Climate change & Weather instability
  - Maintain and renew the Producer's population





THANK YOU FOR YOUR ATTENTION !

