



COCERAL

Production and Trade Forecasts 2013/14

Advisory Group Cereals, Oilseeds, Protein Crops
Brussels, 21 June 2013



COCERAL Members

Associate Members

COCERAL is the EU association representing trade in cereals, oilseeds, feedstuffs, olive oil and agrosupply

- **31 Member Associations**
- **19 EU countries**
- **1 Associated in Switzerland**
- **2700 companies**



EU-28 Grain Crops Forecasts

EU-28	2013/14		2012/13		% Change	
mln ha/ mln t	Area	Prod.	Area	Prod.	Area	Prod.
Soft Wheat	23.3	130.7	23.0	125.4	1.2%	4.1%
Durum Wheat	2.7	8.8	2.76	8.1	-2.4%	8.4%
Barley	12.4	56.2	13.5	54.4	-8%	3.5%
Maize	9.7	66.2	9.9	57.2	-1.8%	13.4%
Oats	2.8	8.4	2.7	7.9	1.1%	5.6%
Rye	2.6	9.4	2.4	8.7	7.6%	7.4%
TOTAL	57.6	295.2	58.1	276.5	-0.9%	6.3%

Source: COCERAL

EU-28 Grain Balance Sheet

mln t	SOFT WHEAT		BARLEY		MAIZE		TOTAL CEREALS	
	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13
Production	130.7	125.4	56.3	54.4	66.2	57.2	295.2	276.5
Opening stocks	10.6	15.2	5.5	5.8	6.1	7.7	25.8	33.1
Imports	3	3.7	0.3	0.1	8.0	11.8	13.6	18.0
TOTAL RESOURCES	144.3	144.4	62.2	60.2	80.3	76.7	334.6	327.6
Feed	49.0	49.6	36.0	35.8	52.2	51.7	161.9	161.9
Bioethanol	5.0	4.6	0.4	0.3	3.7	3.3	10.0	9.2
Industry & human	53.8	53.8	8.7	8.6	12.2	12.1	87.8	87.5
TOTAL CONSUMPTION	113.6	113.8	48.3	47.9	69.9	68.9	272.8	271.8
Exports (including flour, semolina, malt)	17.7	20.0	6.3	6.8	1.5	1.7	26.9	30.0
Carry-out	13	10.6	7.6	5.5	8.9	6.1	34.9	25.8

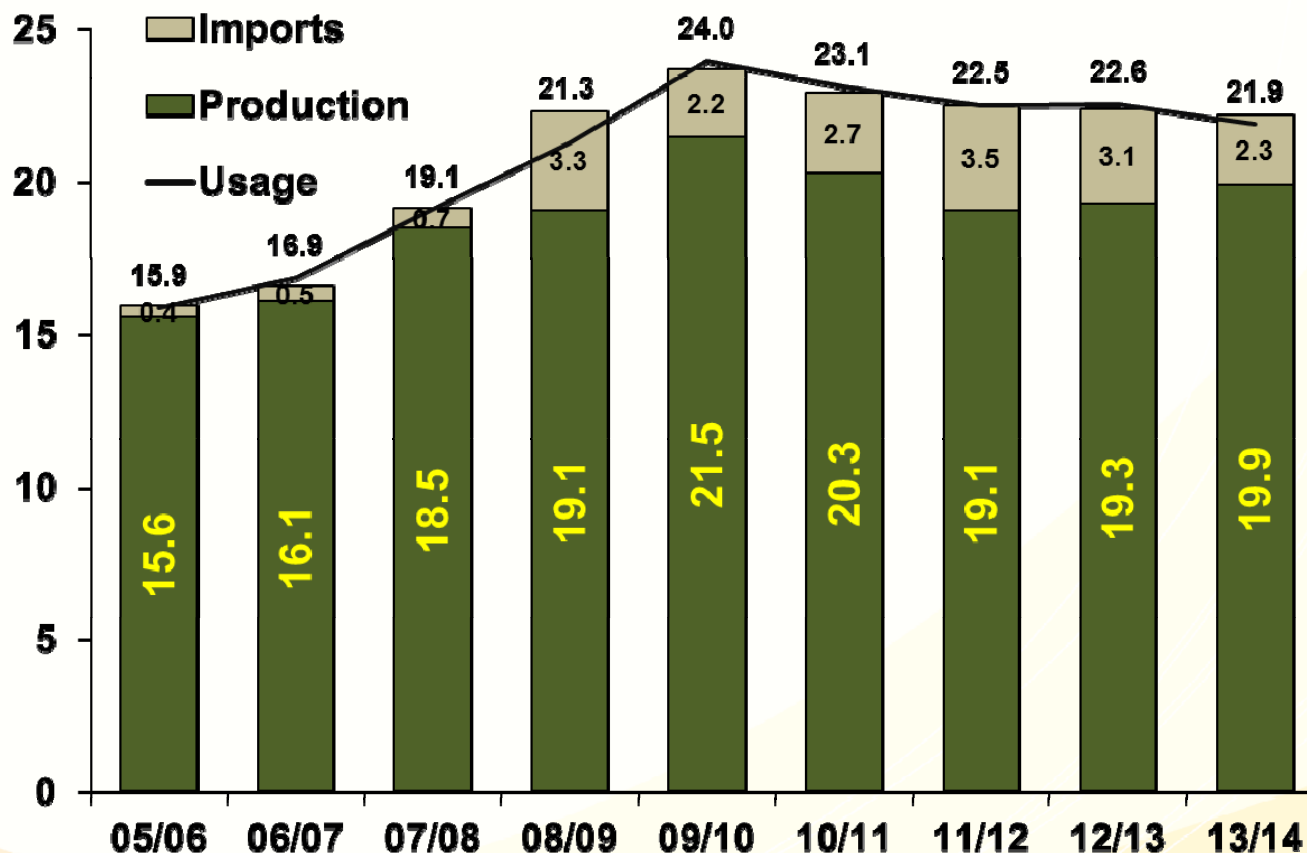
Source: COCERAL

EU-28 Oilseed Crops Forecasts

EU-28	2013/14		2012/13		% Change	
mln ha/ mln t	Area	Prod.	Area	Prod.	Area	Prod.
Rapeseed	6.6	19.9	6.3	19.6	6%	2.2%
Sunflower	4.3	7.7	4.2	6.8	2%	12.3%
Soybeans	0.5	1.2	0.4	0.9	14.7%	23.5%
TOTAL	11.5	28.9	10.9	27.2	4.8%	5.8%

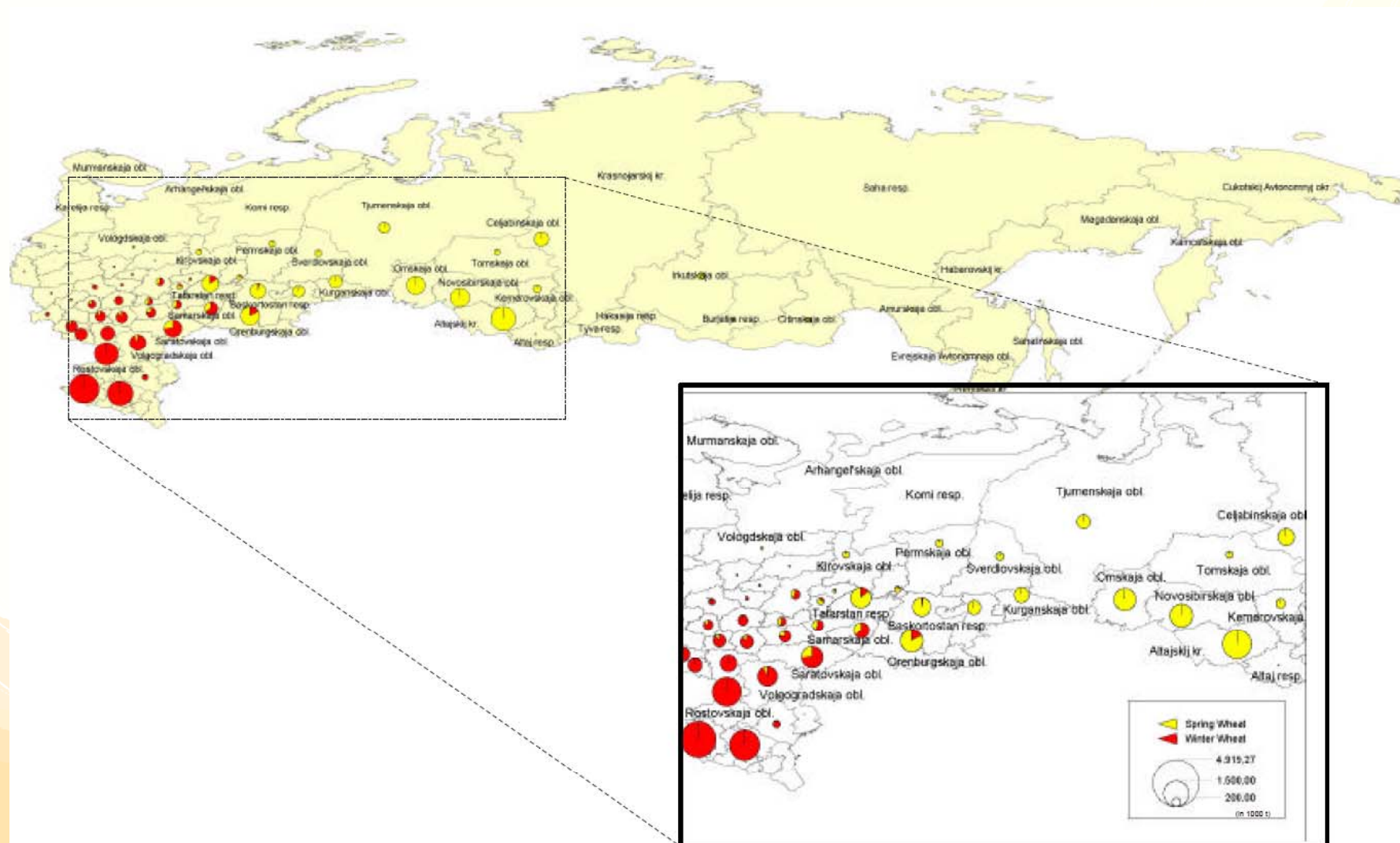
Source: COCERAL

EU rapeseed balance (mln t)



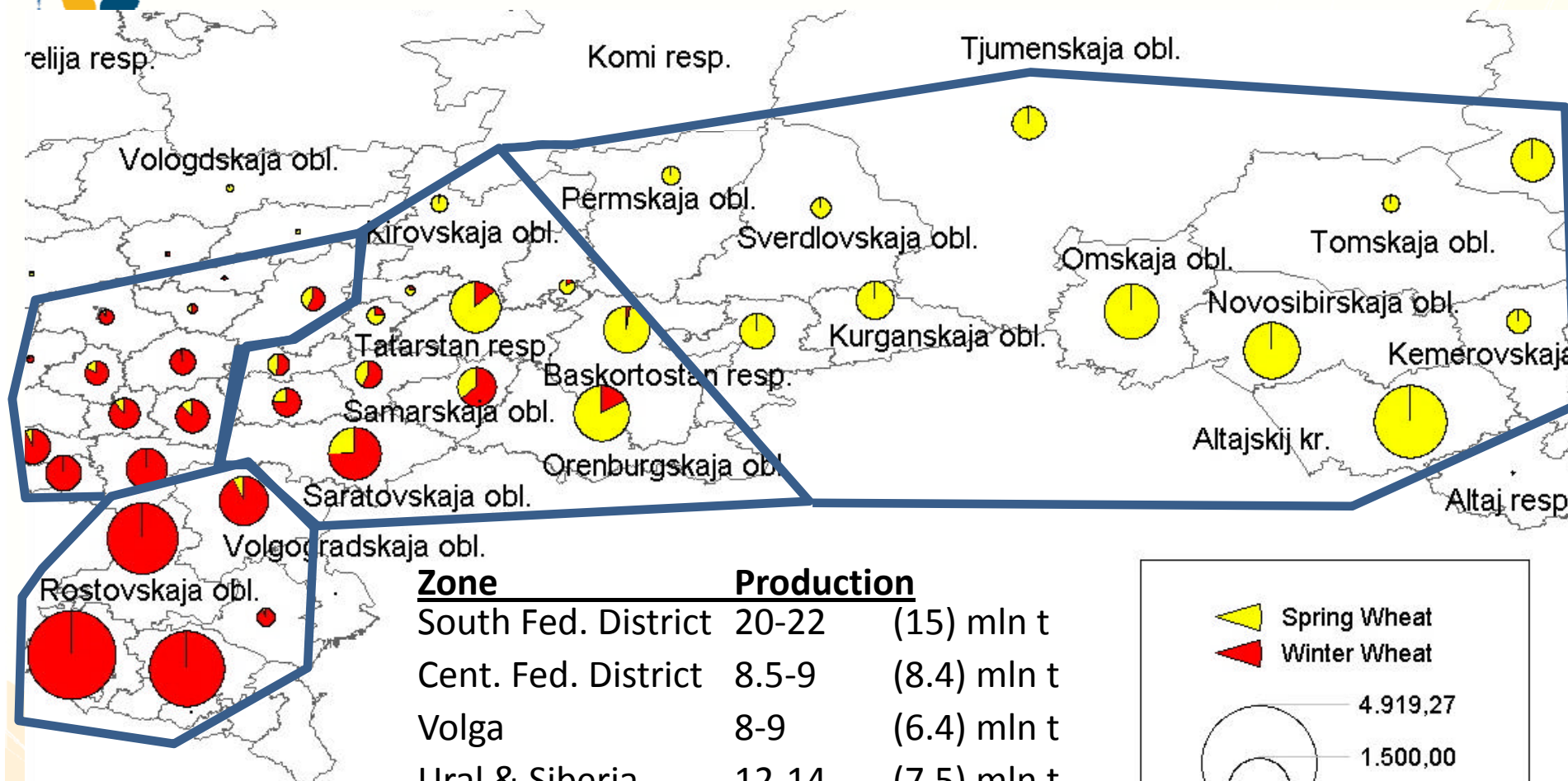
Production	11.4	11.3	18.5	19.1	21.5	20.3	19.1	19.3	19.9
Imports	0.9	0.8	0.7	3.3	2.2	2.7	3.5	3.1	2.3
Ukraine			0.4	2.3	1.4	1.2	1.1	1.1	1.5
Australia			0.2	0.8	0.4	1.1	1.9	1.6	0.5
Canada					0.1	0.3	0.2	0.1	0.0

Russian Wheat Area





Russian Wheat Area



Potential for 15 mln t more wheat production in Russia

- 7.5 mln t more winter wheat!!(harvest has started)
- 7.5 mln t more spring wheat?? (planting recently finished!)

Russia & Ukraine: change in wheat exports

		Russia		Ukraine		Change of potential vs previous year
	Attribute	2012/2013	2013/2014	2012/2013	2013/2014	Production Export
Wheat	Production	38	54	16	20	+20 mln
	Total Supply	50	60	21	22	
	Exports	11	17	7	8	+6-8 mln
	Ending Stocks	5	6	2	2	
Barley	Production	14	18	7	7	+4 mln
	Total Supply	15	18	8	8	
	Exports	2	4	2	2	+1 mln
	Ending Stocks	1	1	1	1	
Corn	Production	8	10	21	26	+6 mln
	Total Supply	9	10	22	27	
	Exports	2	3	14	17	+2-4 mln
	Ending Stocks	0	0	1	2	
Grain	Production	67	91	45	54	+32 mln
	Total Supply	81	99	53	59	
	Exports	16	24	23	27	+10-14 mln
	Ending Stocks	7	9	4	5	