



**les céréales françaises** : pour les marchés du monde



## **French Wheat Outlook 2014 Crop**



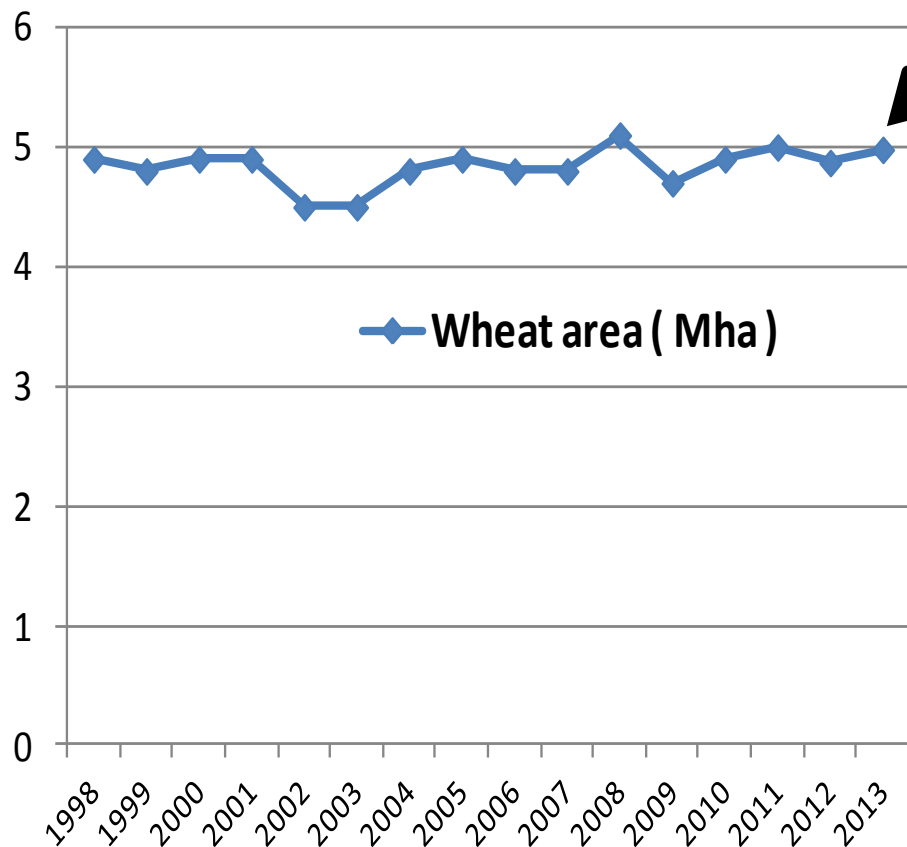
**Jean-Pierre LANGLOIS-BERTHELOT**  
**President France Export Cereales**



IAOM Cape Town, december 3-6th, 2014

# Wheat area : Very stable during time

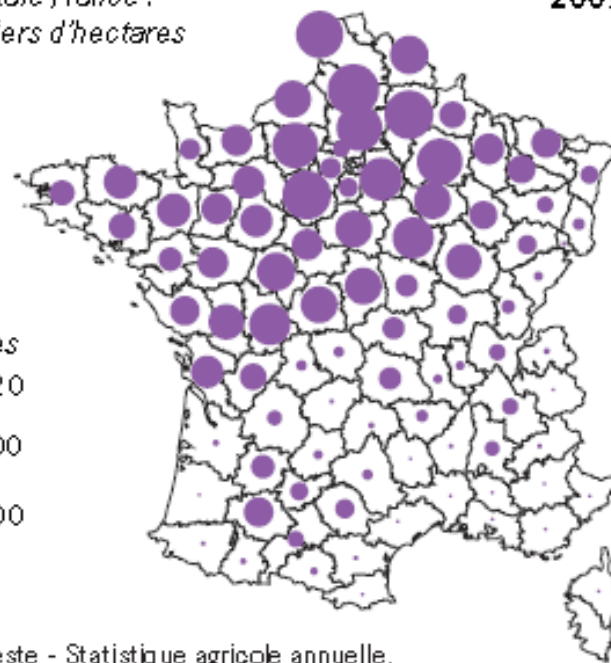
## 2014 Area : 5.012 Mha



### Milling Wheat Area

surface totale France :  
4 733 milliers d'hectares

2009P

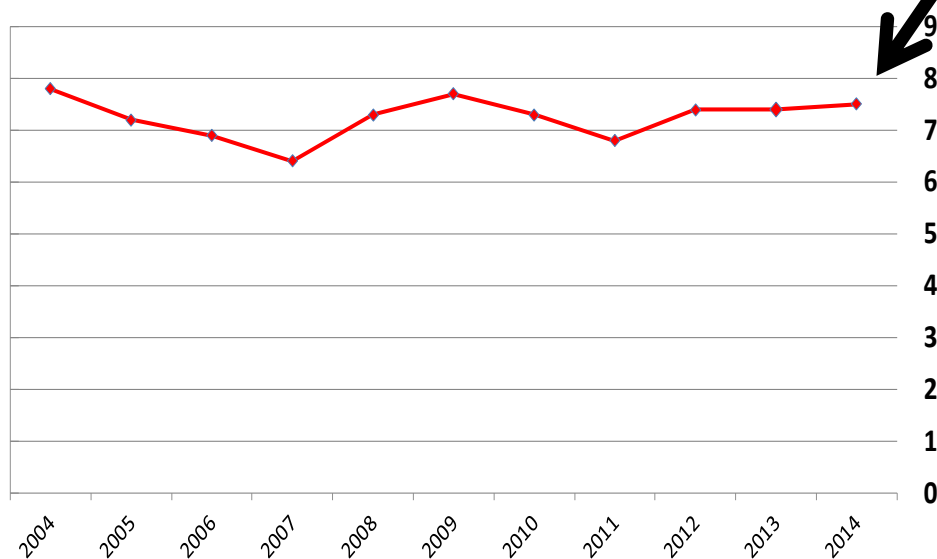


Source : Agreste - Statistique agricole annuelle.

# Wheat yield : High and stable at 7.5 T/ha

## 2014 Wheat yield : 7.46 T/ha

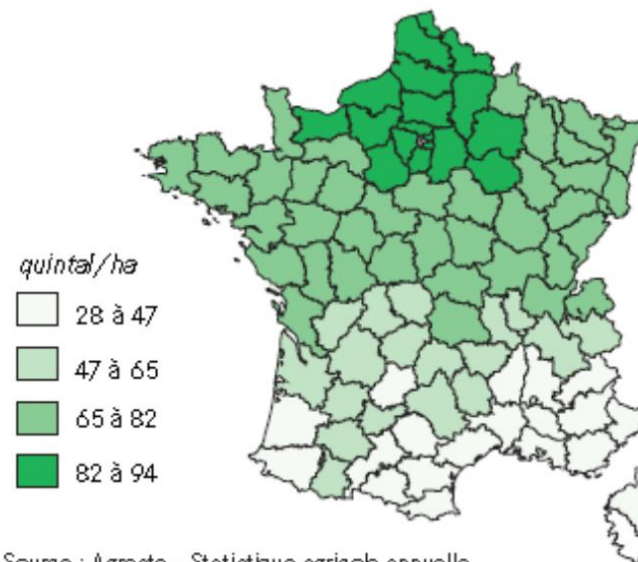
Yield : t/ha



Milling wheat yield

moyenne France : 77 quintaux/ha

2009P

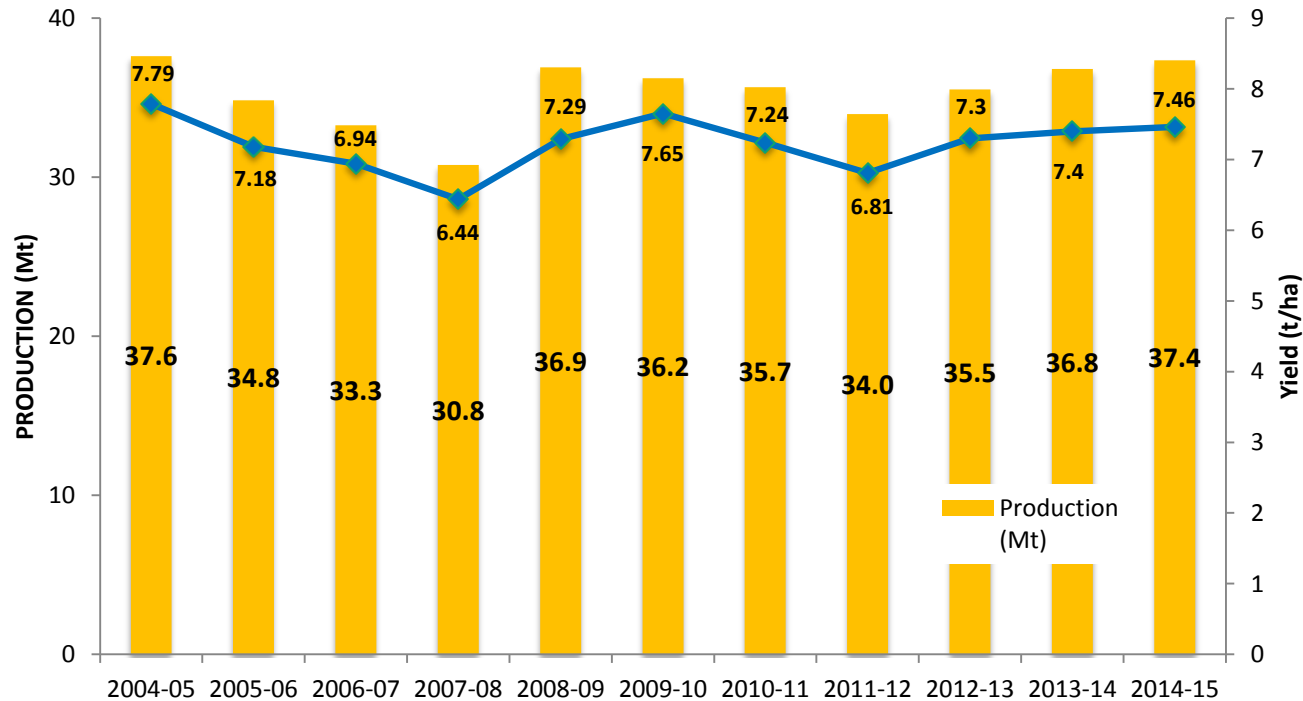


Source : Agreste - Statistique agricole annuelle.

# High stability for Wheat production

## 2014 Production 37,4 Mt

- Stable area : 5 Mha
- Slight increase for yield : 7.46 T/ha



Source : FranceAgriMer / Agreste

# France position in Top 10 producing countries

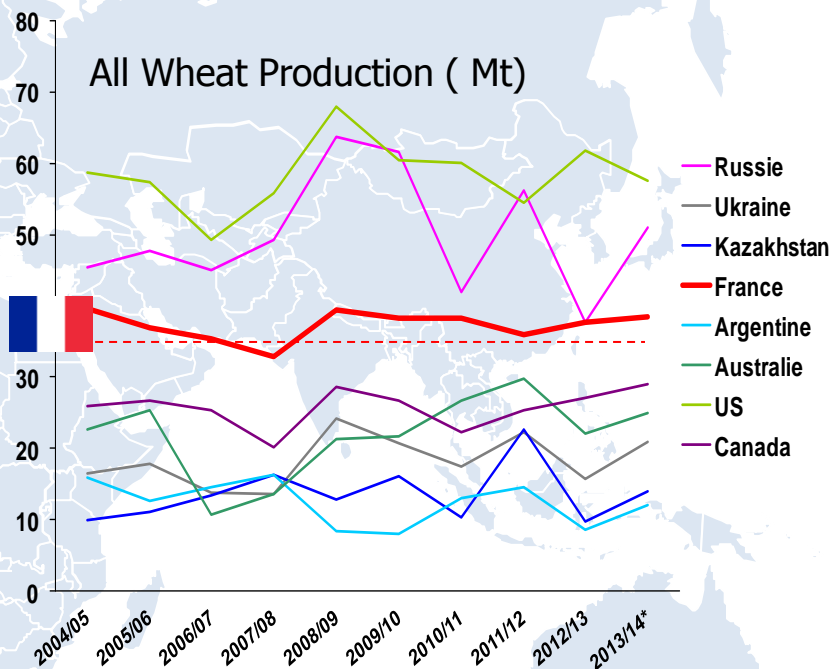
## World milling Wheat production

		Production Mt Avg 2011/12-2013/14	% World Production
	<b>World</b>	<b>651</b>	<b>100</b>
<b>1</b>	<b>China</b>	<b>120</b>	<b>18,4%</b>
<b>2</b>	<b>India</b>	<b>90,6</b>	<b>13,9%</b>
<b>3</b>	<b>USA</b>	<b>56,3</b>	<b>8,6%</b>
<b>4</b>	<b>Russia</b>	<b>48,7</b>	<b>7,5%</b>
<b>5</b>	<b>France</b>	<b>35,4</b>	<b>5,4%</b>
<b>6</b>	<b>Australia</b>	<b>25,9</b>	<b>3,9%</b>
<b>7</b>	<b>Pakistan</b>	<b>23,8</b>	<b>3,7%</b>
<b>8</b>	<b>Germany</b>	<b>23,4</b>	<b>3,6%</b>
<b>9</b>	<b>Canada</b>	<b>24,9</b>	<b>3,8%</b>
<b>10</b>	<b>Ukraine</b>	<b>20,1</b>	<b>3%</b>
<b>TOTAL 10 main producers</b>		<b>469.1</b>	<b>72%</b>

Source : CIC

**France is 5<sup>th</sup> wheat producing country for milling Wheat**

**France has the most stable production among the main exporters**



Source : FEC d'après CIC, UkrAgro, Abare  
2013/14\* : prévisions

# 2014 French milling wheat quality

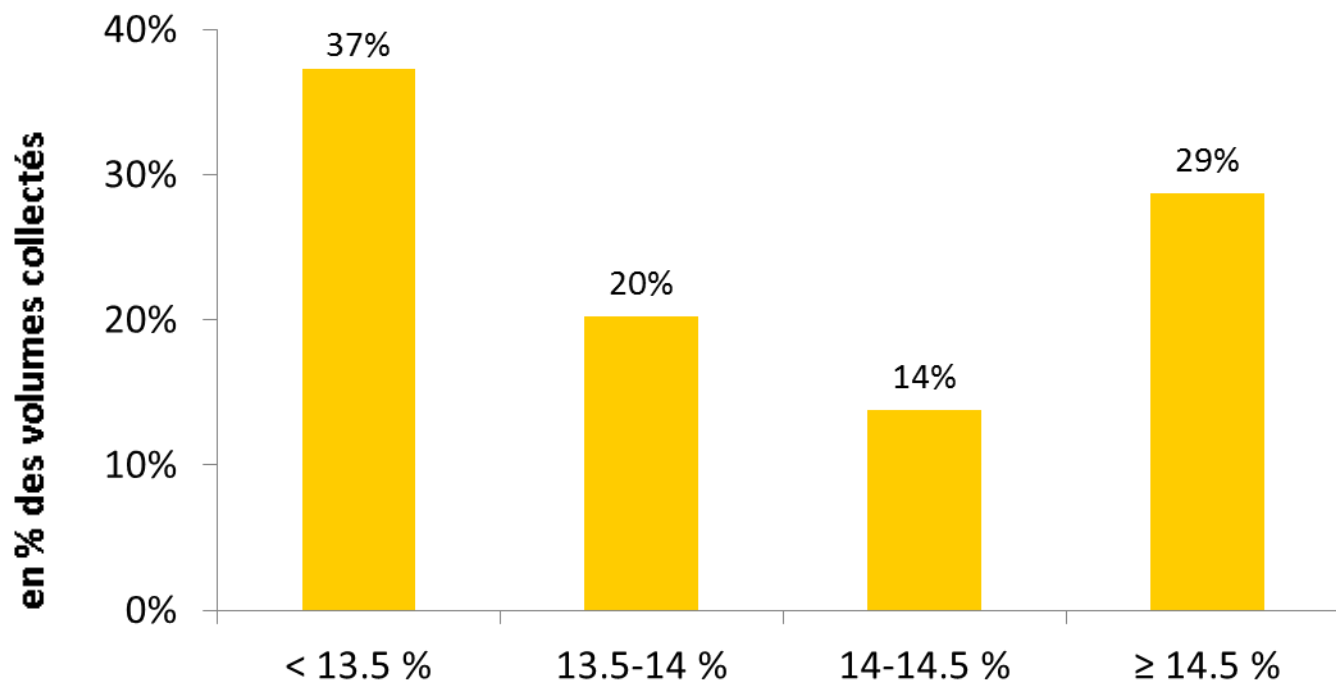


FranceAgriMer

ARVALIS  
Institut du végétal

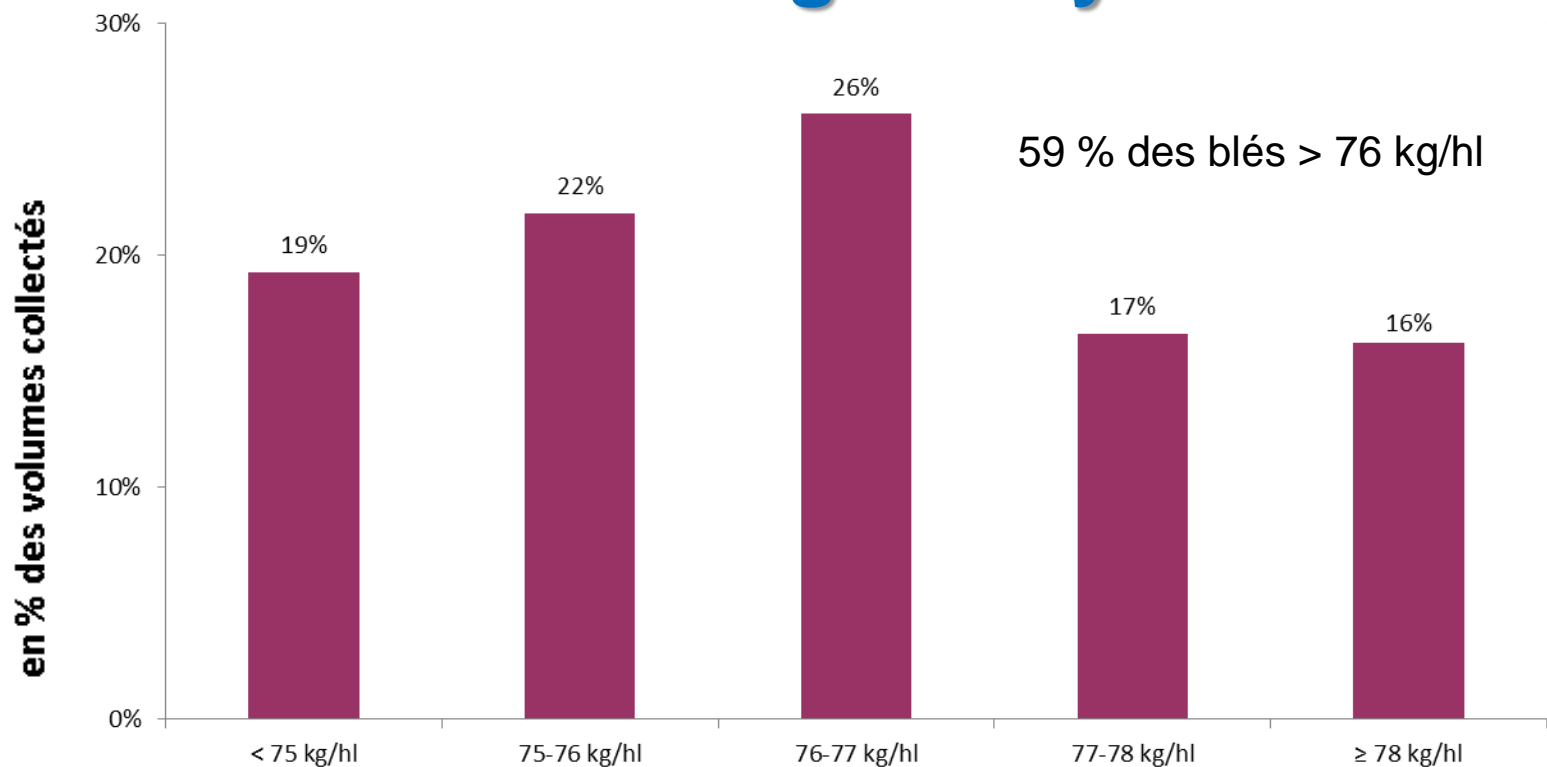
- A survey carried out jointly by Arvalis (technical Institute) and FranceAgriMer (French Ministry of Agriculture),
- 527 samples collected in 260 silos, representing incoming wheat in storage companies before cleaning or drying
- Analysed by Arvalis and FranceAgriMer,
- To give a overview of 2014 harvest quality : average values and distribution,
- The role of traders is to mix different batches to meet customer's requirements.

# 2014 crop :Wheat moisture content % at storage entry



Source : enquête collecteurs 2014

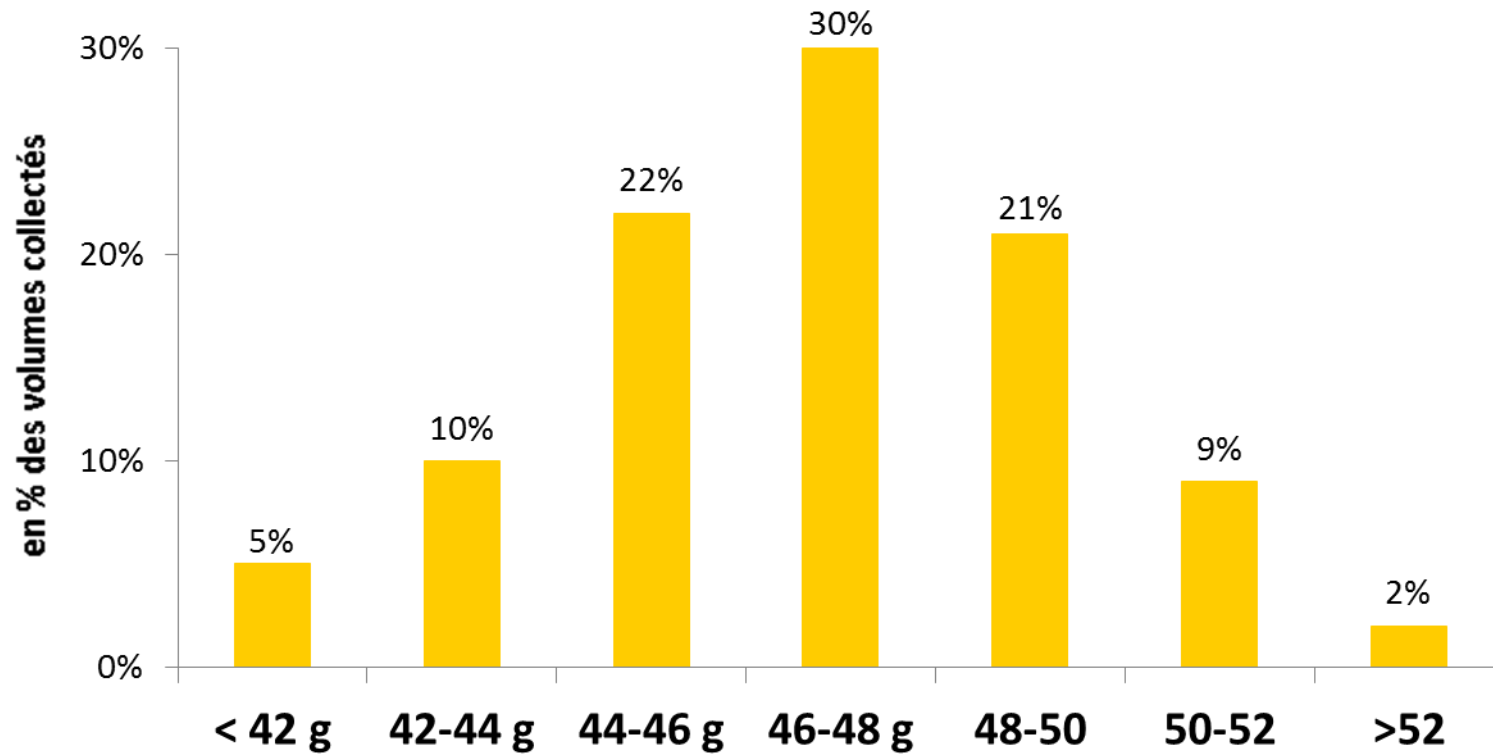
# 2014 crop : Test weight kg/hl at storage entry



Source : enquête collecteurs 2014



# 2014 crop : 1000 kernels weight

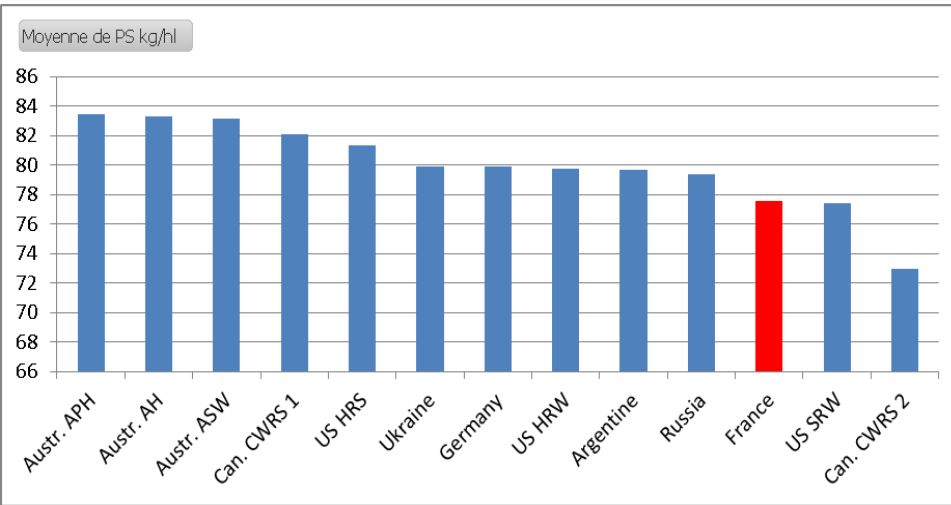


(g tel que)

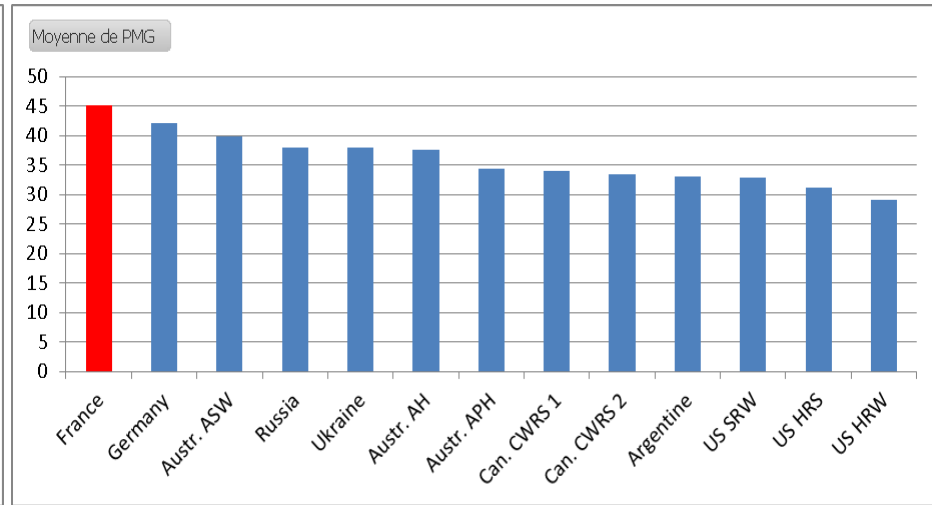
Source : FranceAgriMer / Enquête collecteurs 2014

# Indirect tests of Milling yield : Position of French Wheat

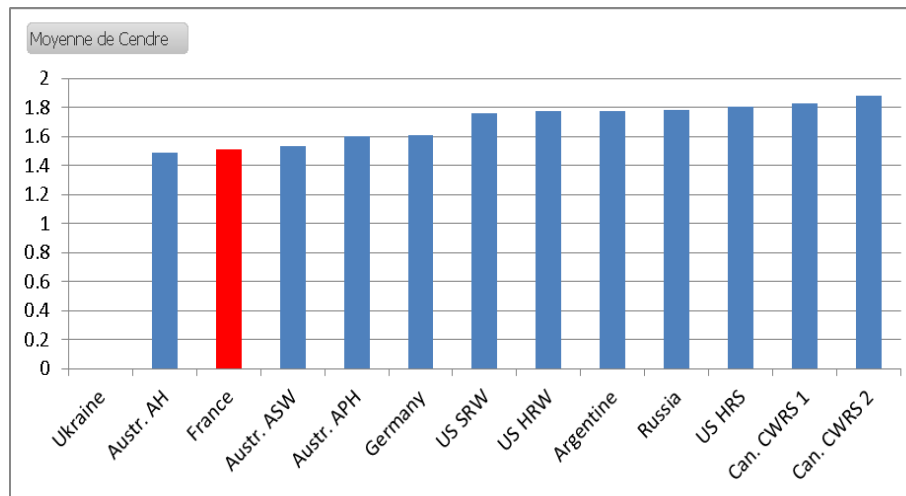
## Test Weight (Kg/hl)



## 1000 kernels weight (g, 13.5 % d'humidité)

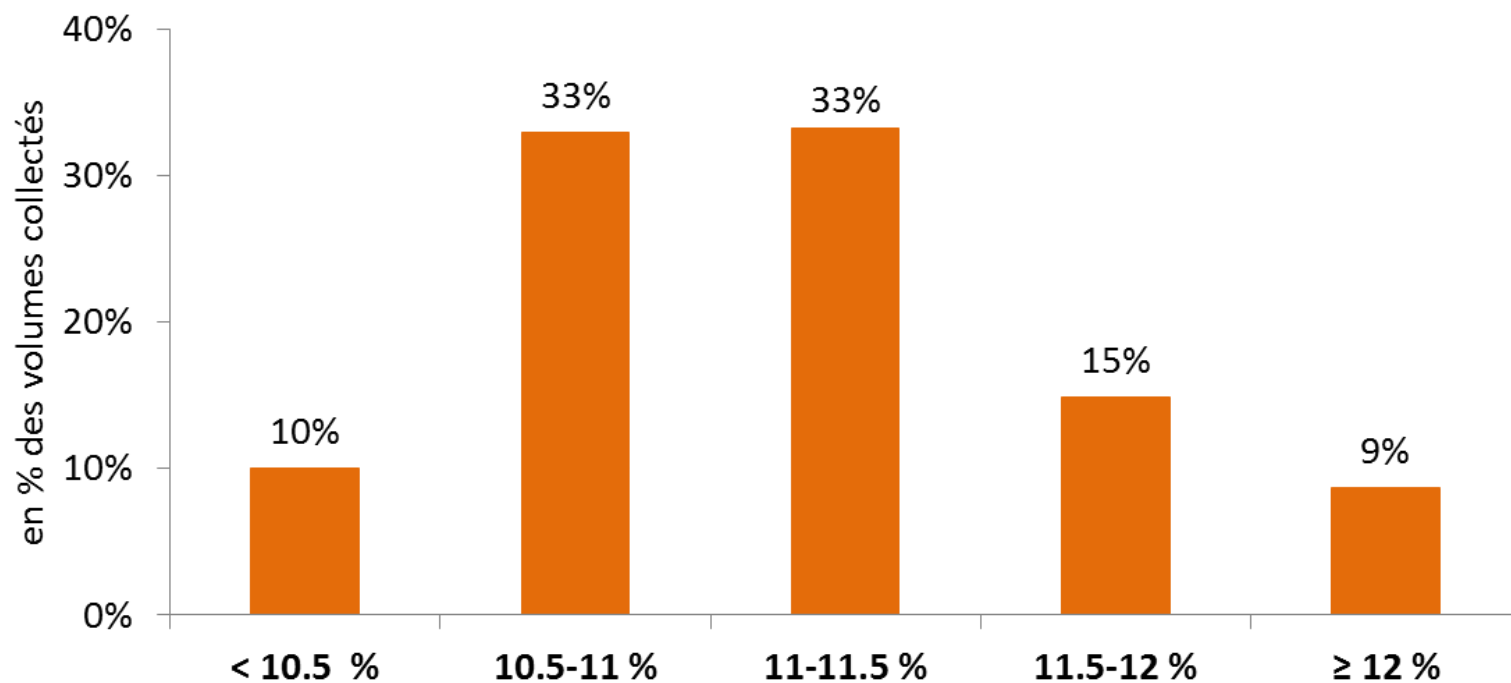


## Grain ash content (% DM)



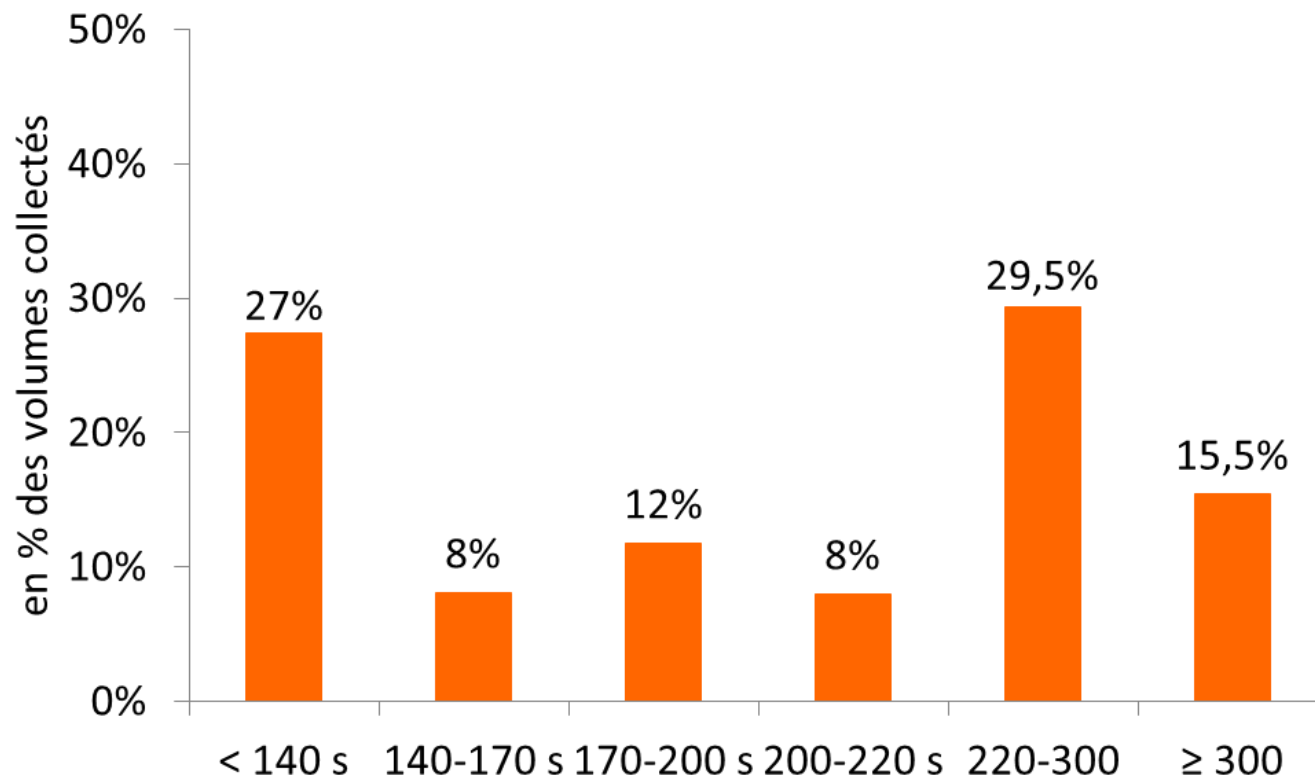
Sources : ARVALIS, FAM, AFZ, Ca, Trigo Argentino, CGC, US Wheat Associates, BEE, GrainGrowers)

# Protein content % (DM basis) 2014 Crop



Source : enquête collecteurs 2014

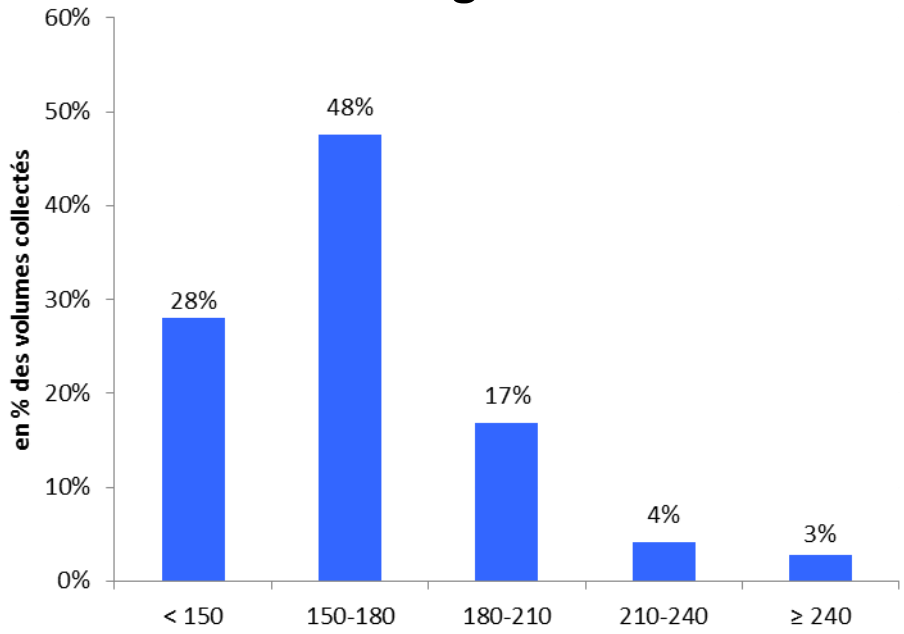
# Falling Number (sec) 2014 Crop



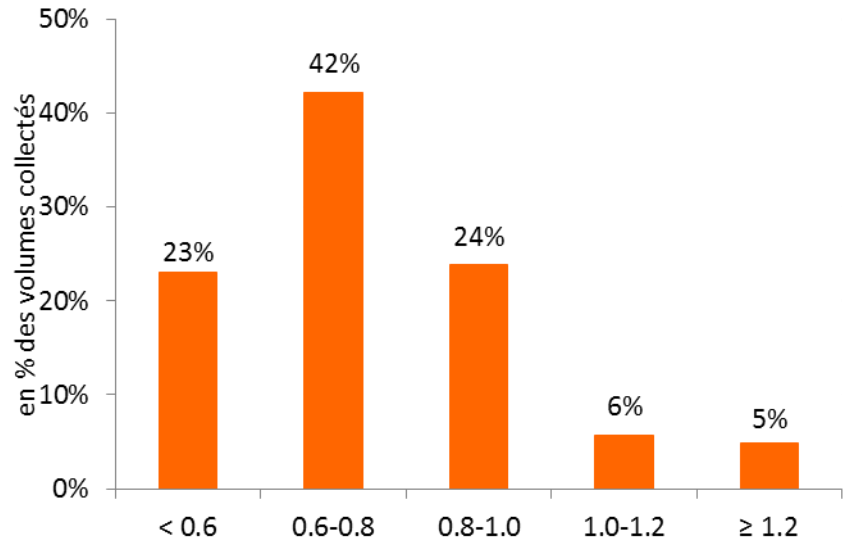
# Baking strength W and P/L Chopin Alveograph



- W in slight decrease



- P/L well balanced



Analyses réalisées sur 73% de la collecte

Source : enquête collecteurs 2014

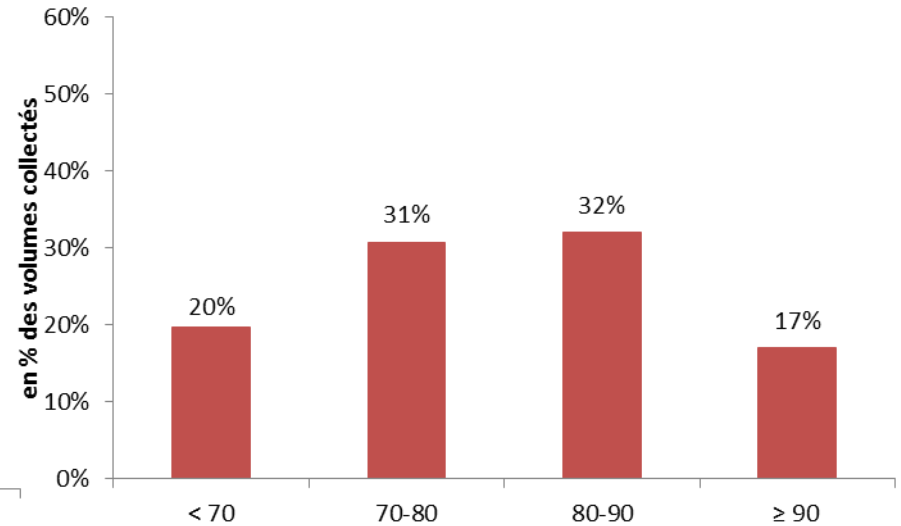
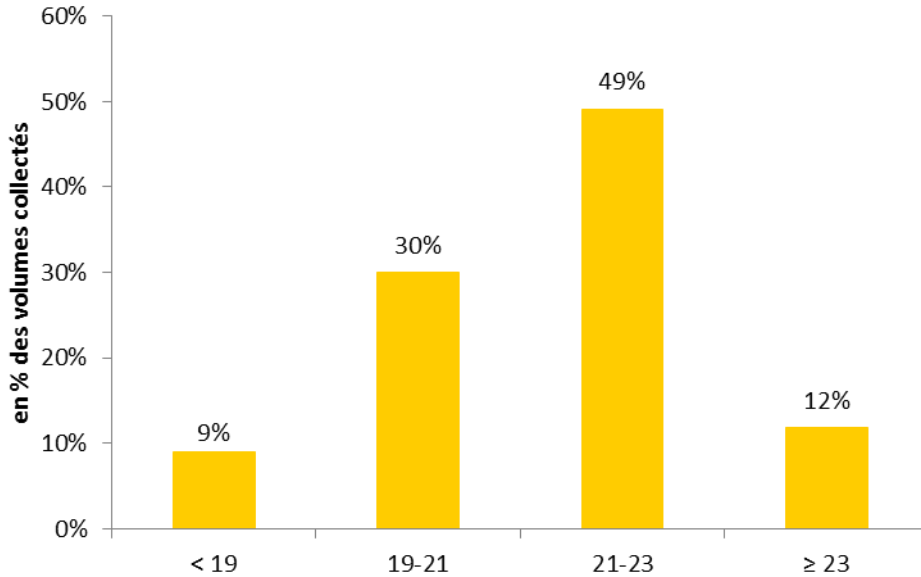




# Wet Gluten %

# Gluten Index

- Visco-elastic quality:
- Well balanced rather extensible




Source : FranceAgriMer / ARVALIS – Institut du végétal / Enquête collecteurs 2014


# Behavior for French bread-making

## A normalized test (NF V03 – 716)

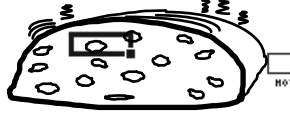
		Ingrédients					Fécule						
		1	4	7	10	7	4	1					
<b>PETRISSAGE</b>													
LISSAGE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
COLLANT DE LA PÂTE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
CONSISTANCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
EXTENSIBILITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
ELASTICITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
RELACHEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
<b>POINTAGE</b>													
DETENTE: RELACHEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
<b>FACONNAGE</b>													
ALLONGEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
DECHIREMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
ELASTICITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
COLLANT DE LA PÂTE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
<b>APPRET</b>													
ACTIVITE FERMENTAIRE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
PÂTE: DECHIREMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
<b>MISE AU FOUR</b>													
COLLANT DE LA PÂTE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
TENUE DE LA PÂTE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 2	-	<input type="text"/>
<b>CARACTERISTIQUES DU PAIN</b>													
SECTION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
COULEUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 2	-	<input type="text"/>
EPAISSEUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
CROUSTILLANT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 0.5	-	<input type="text"/>
<b>COUPS DE LAME</b>													
DEVELOPPEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
REGULARITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
DECHIREMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
<b>VOLUME</b>													
VOLUME MOYEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
MASSE MOYENNE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
<b>CARACTERISTIQUES DE LA MIE</b>													
COULEUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
TEXTURE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
SOUPLESSE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
ELASTICITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
COLLANT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
<b>ALVEOLAGE</b>													
REGULARITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
EPAISSEUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 1	-	<input type="text"/>
<b>ODEUR</b>													
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× 4	-	<input type="text"/>



**Dough note/ 100**



**Bread note/ 100**



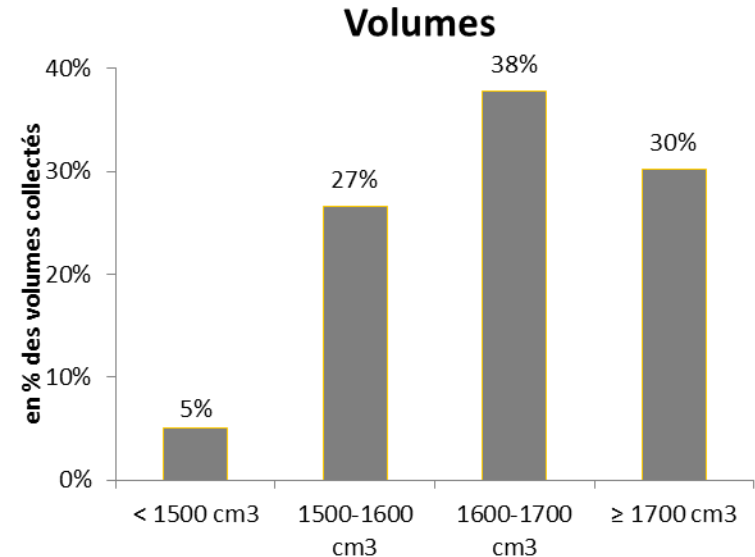
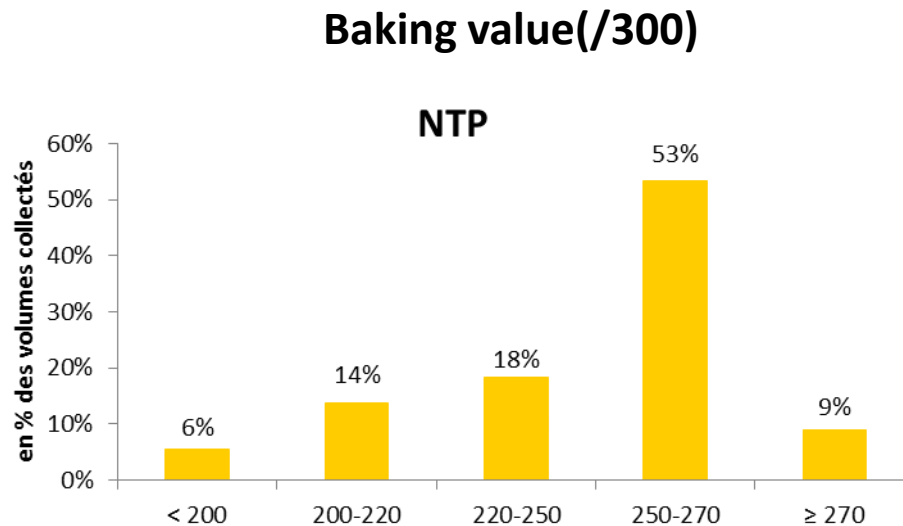
**Crumb note/ 100**

NOTE: La grille doit être remplie avec la lettre 'x'. Ne mettre qu'une seule croix par ligne.



# Behavior for French Bread-making

- 62% with a Very good or good notation



Source : enquête collecteurs 2014

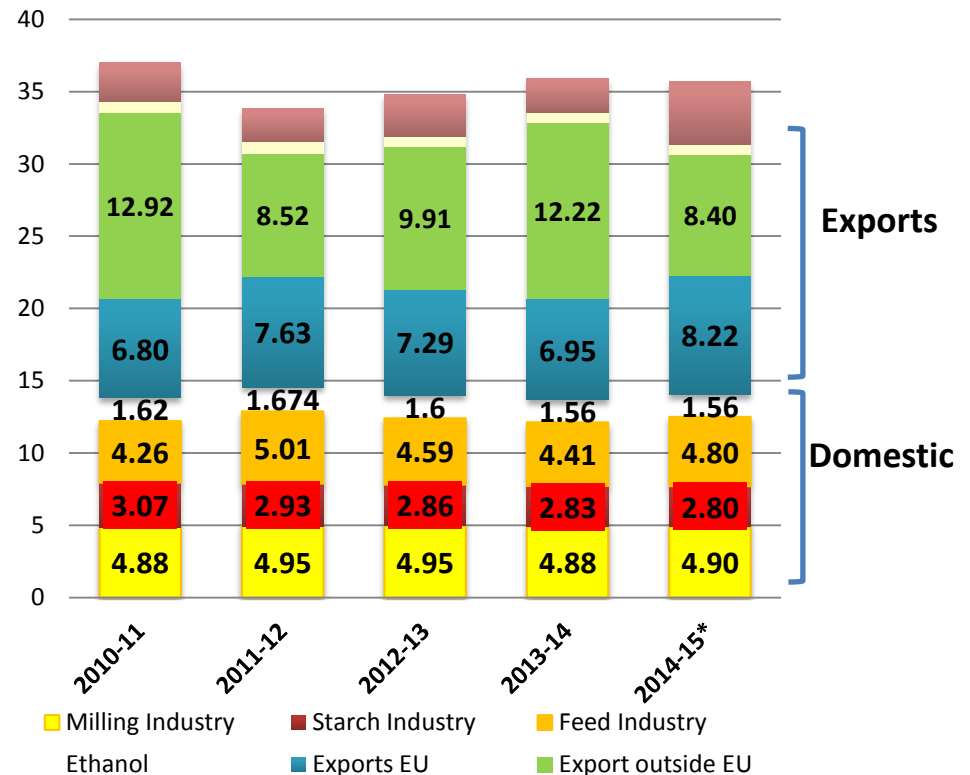
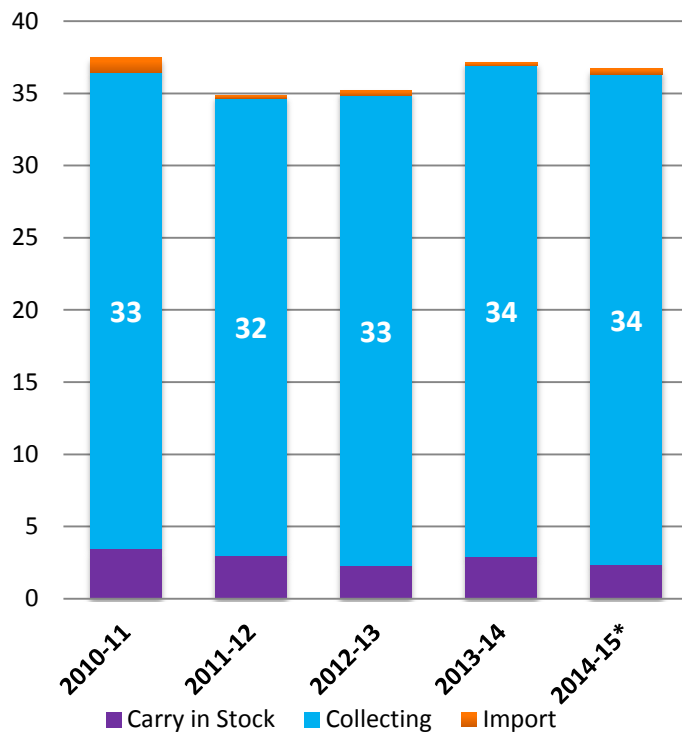


- **Main points:**
  - Good hydration capacity of dough
  - Dough well balanced for bread shapping
  - Good aspect of bread with excellent volume of loaf



# French wheat balance

Total Exports : Forecasted at 17 MT  
 Export outside EU forecasted at 8.4 MT



Source FranceAgriMer Nov 2014

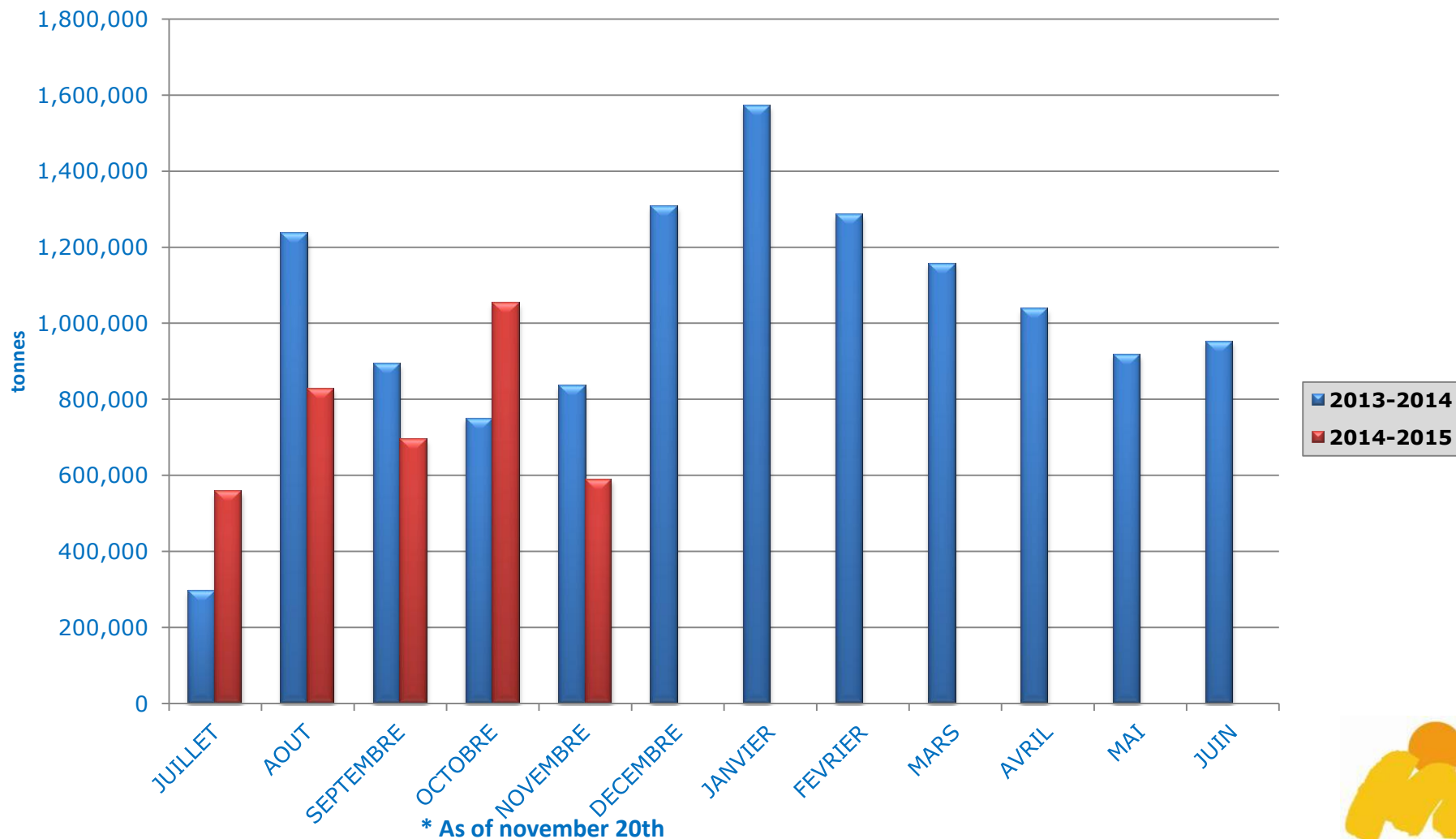
➤ French domestic market	15 MiT	33 % for milling Industry 31 % for feed industry
➤ EU market	7 MiT	65 % for milling Industry 35 % for feed industry
➤ Exports outside EU	11 MiT	95% for milling industry



**More than 7.5 MiT for Feed Industry**

# Despite quality issues on 2014 Crop : Exports are strong

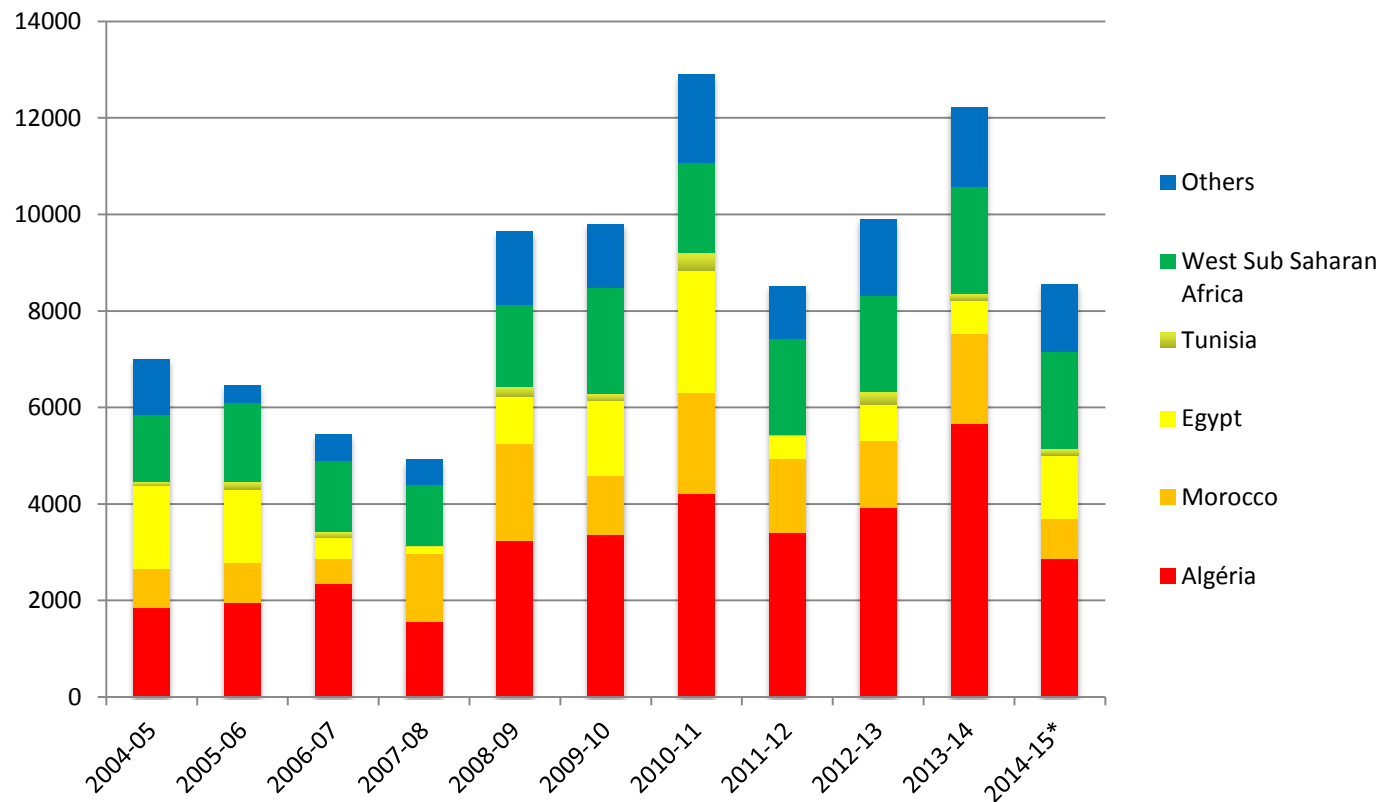
## French Exports : Ports loading



# French milling wheat Exports to third countries

## Main destinations

### Nearly 100% for milling



Source: France Export Céréales 2014  
 Prev. 2014/15 elaborated with Stratégie grains and IGC



**les céréales françaises** : pour les marchés du monde



**Merci pour votre attention**

**Thanks for your attention**

**شکرا لانتباهکم**

**感谢关注**

**Os Merci vazam a atenção vore**

**Gracias por su atención**

**Спасибо за ваше внимание**

**Danke für Ihre Aufmerksamkeit**

**با تشکر از توجه شما**

