



les céréales françaises : pour les marchés du monde



2013-2014 French outlook

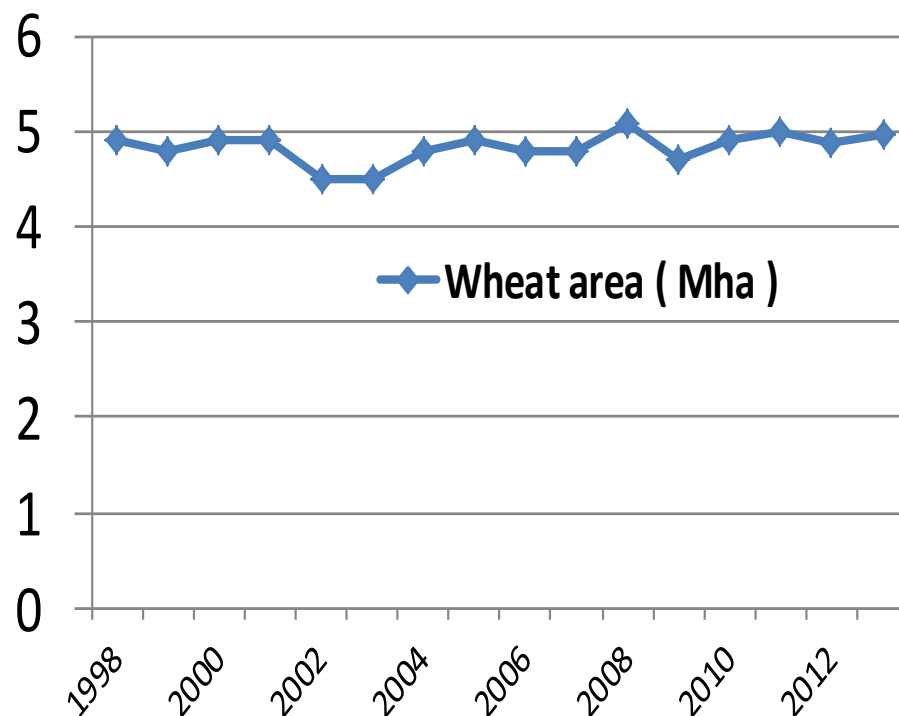
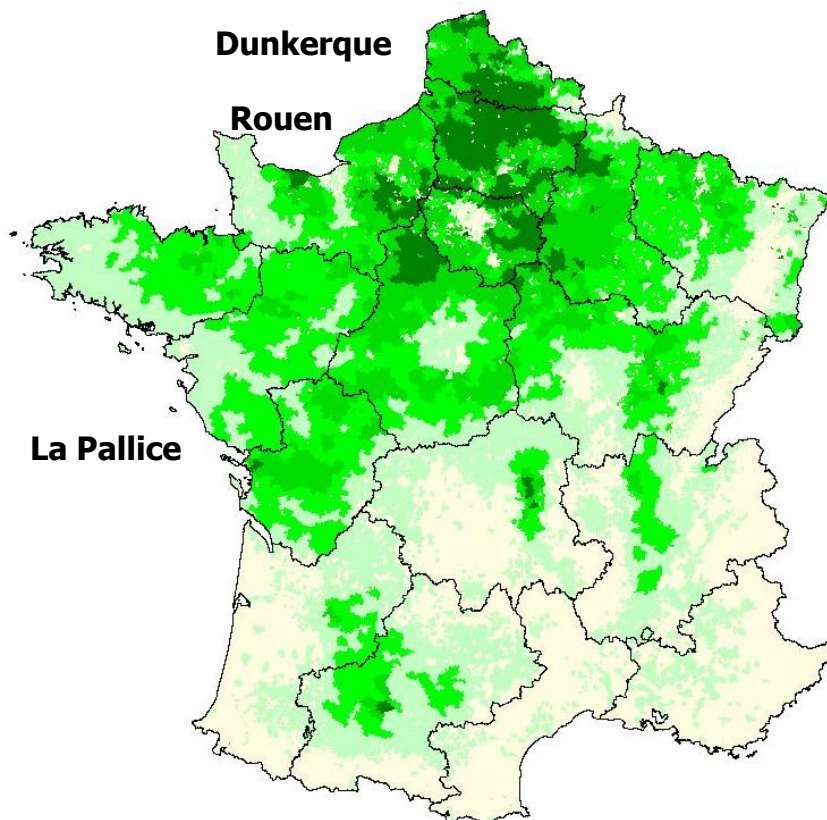
**24th Annual IAOM MEA District Conference,
5-8 November 2013, Sousse, Tunisia**



Jean Pierre LANGLOIS-BERTHELOT

French Milling Wheat area : Around 5 Mha

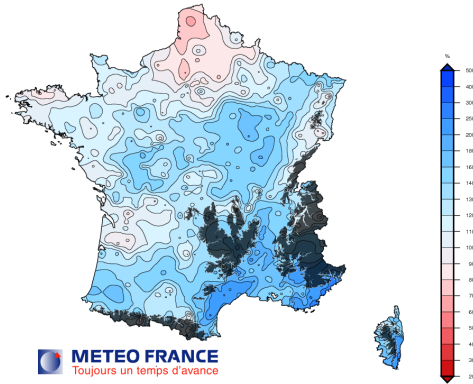
Slight increase in 2013 +2.5% vs 2012



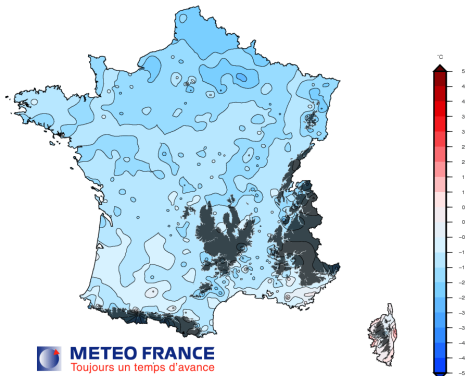
Wheat collecting density (FranceAgriMer)

Source FranceAgriMer Oct 2013

Cumul de précipitations : printemps 2013
Rapport à la moyenne de référence 1981-2010

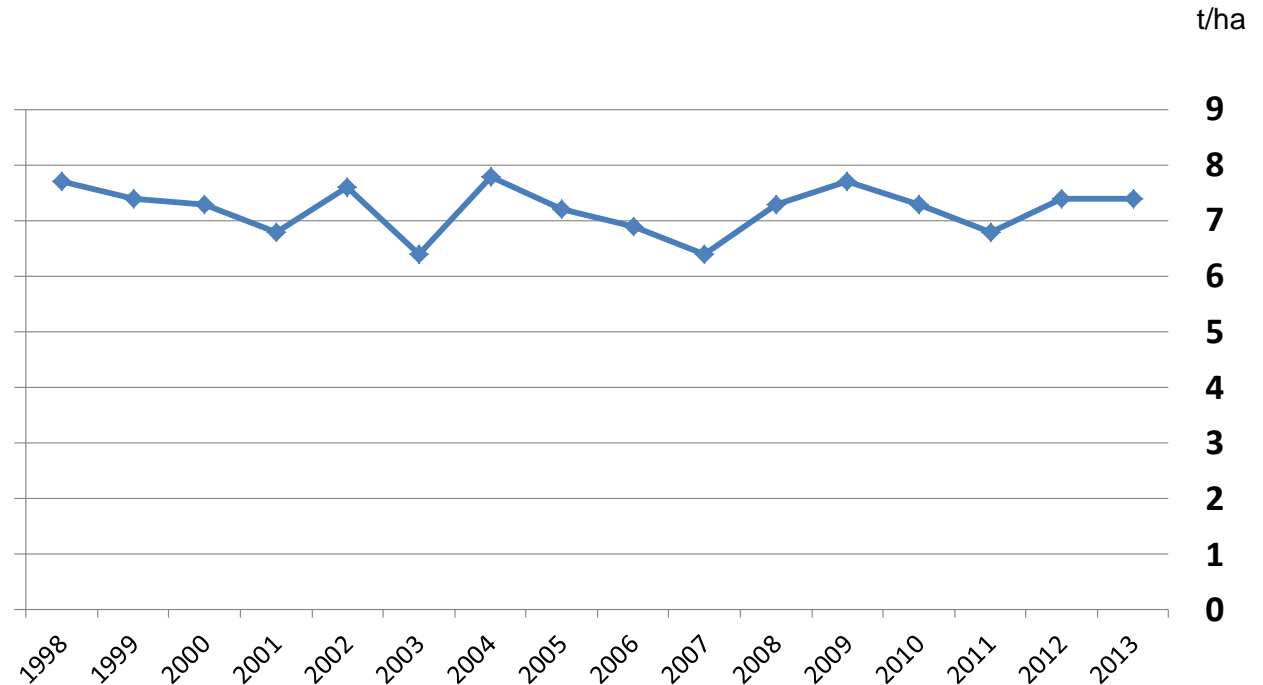


Température moyenne : printemps 2013
Ecart à la moyenne de référence 1981-2010



Evolution of wheat yield (t/ha)

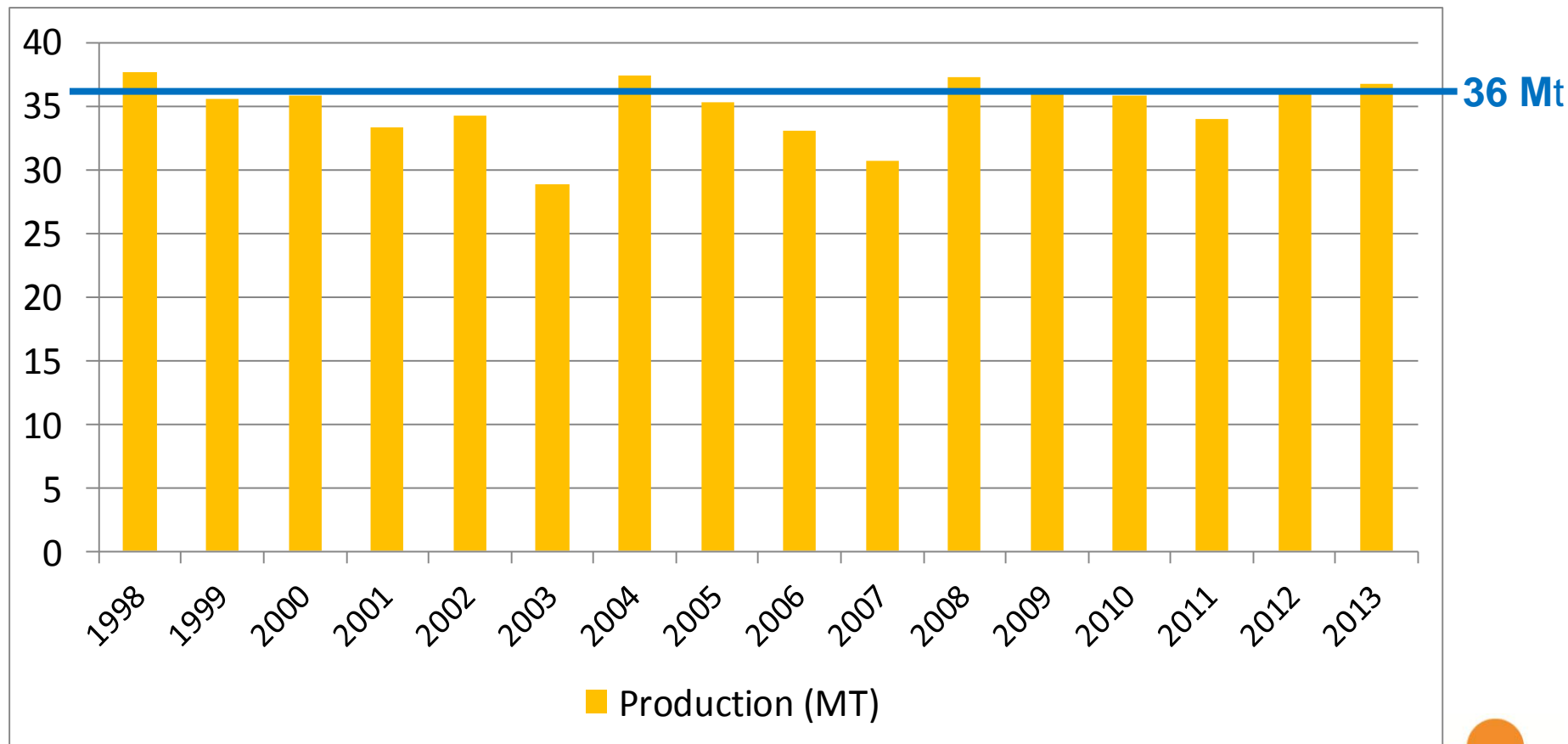
High yields in 2013 (7.4 t/ha vs. 7.3 t/ha in 2012)



Source FranceAgriMer Oct 2013

French milling wheat production (MT)

36,7 MT in 2013 (vs. 35.7 MT in 2012)
A very stable availability in a tight market

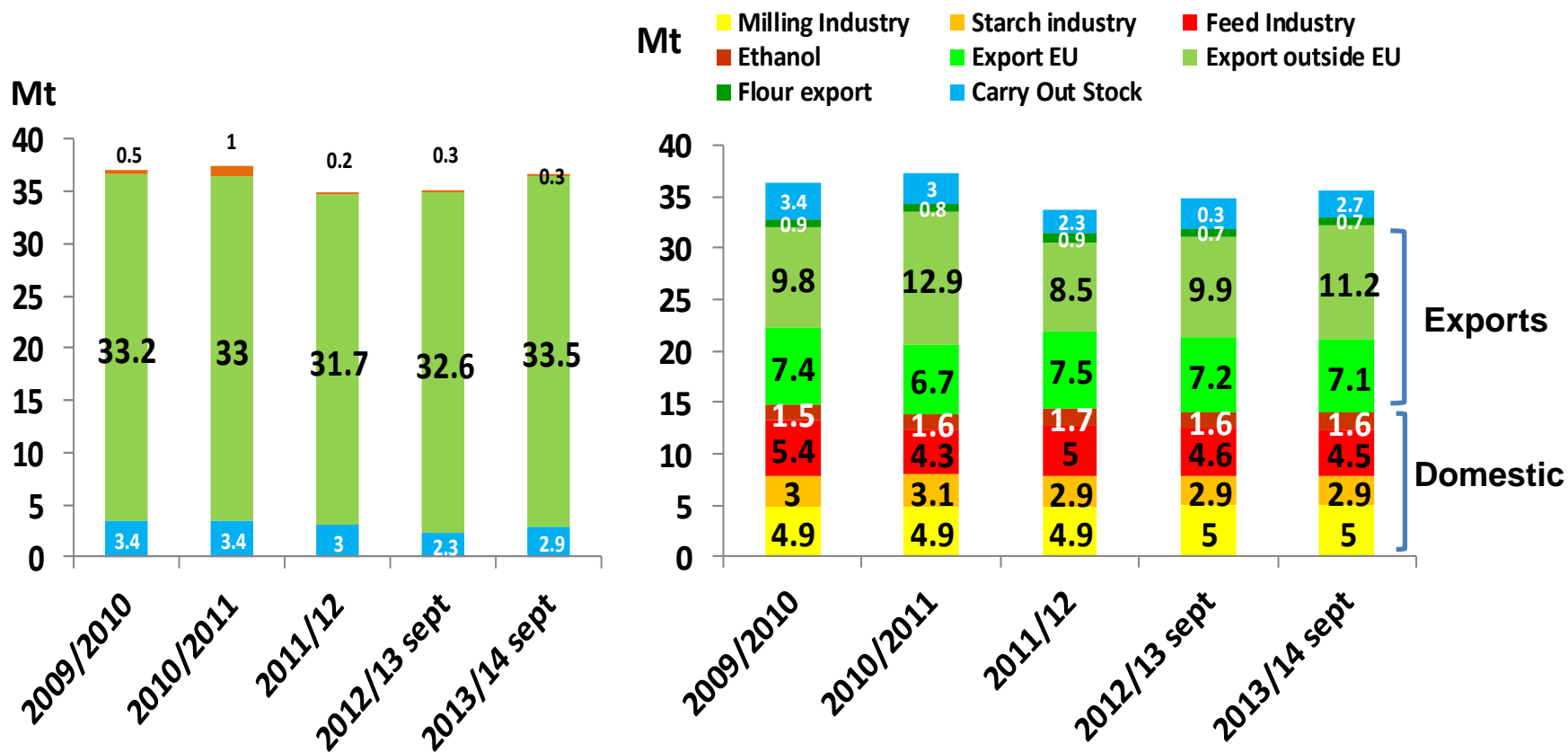


Source FranceAgriMer Oct 2013

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French wheat balance

Total Exports : Forecasted at 19 MT
Export outside EU more than 11 MT



■ Carry In Stock ■ Collecting ■ Import

Source FranceAgriMer Oct 2013

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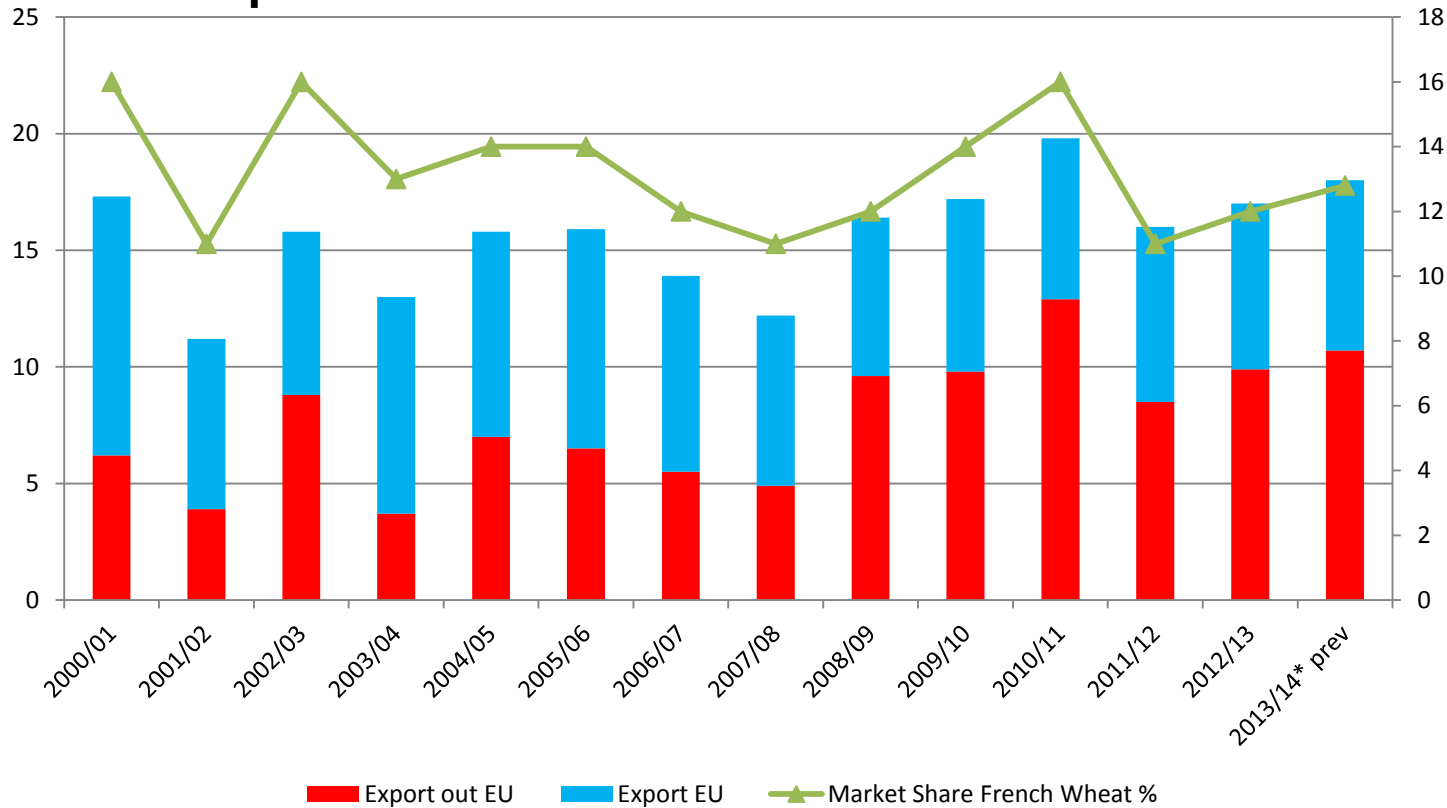
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World market share for French wheat

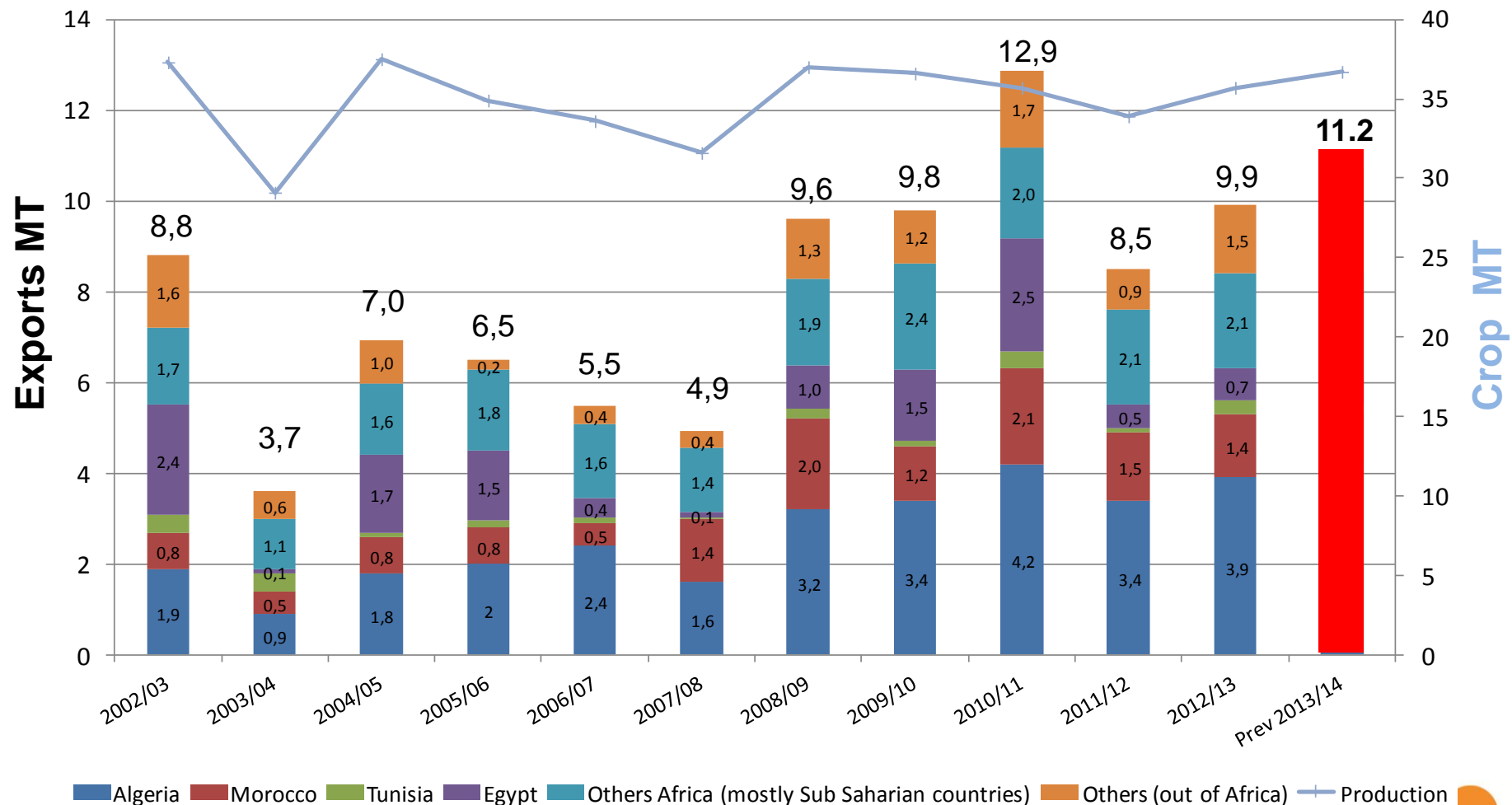
French Wheat Exports MT

World Wheat Market Share %



Source: France Export Céréales 2013
Prev. 2013/14 elaborated with Stratégie grains and IGC

Main customers for French wheat outside EU



Source: FranceAgriMer - Oct 2013
 Forecast 2013/14 based on IGC + Tallage Stratégie Grains 7

First conclusion

- France is the fifth wheat producing country in the world, behind China, India, USA and Russia, and a major contributor to the world wheat market,
- Thanks to its temperate oceanic climate, to its soils, and to the know how of wheat producers, French wheat production is quite regular from one year to another, enabling a stable and reliable contribution to the world wheat market,
- For the on going 2013-2014 marketing year, French production is 1 MT more than last year, available for the export market,
- Purchase of French wheat is always free, with no restriction to exports.





2013 French milling wheat quality

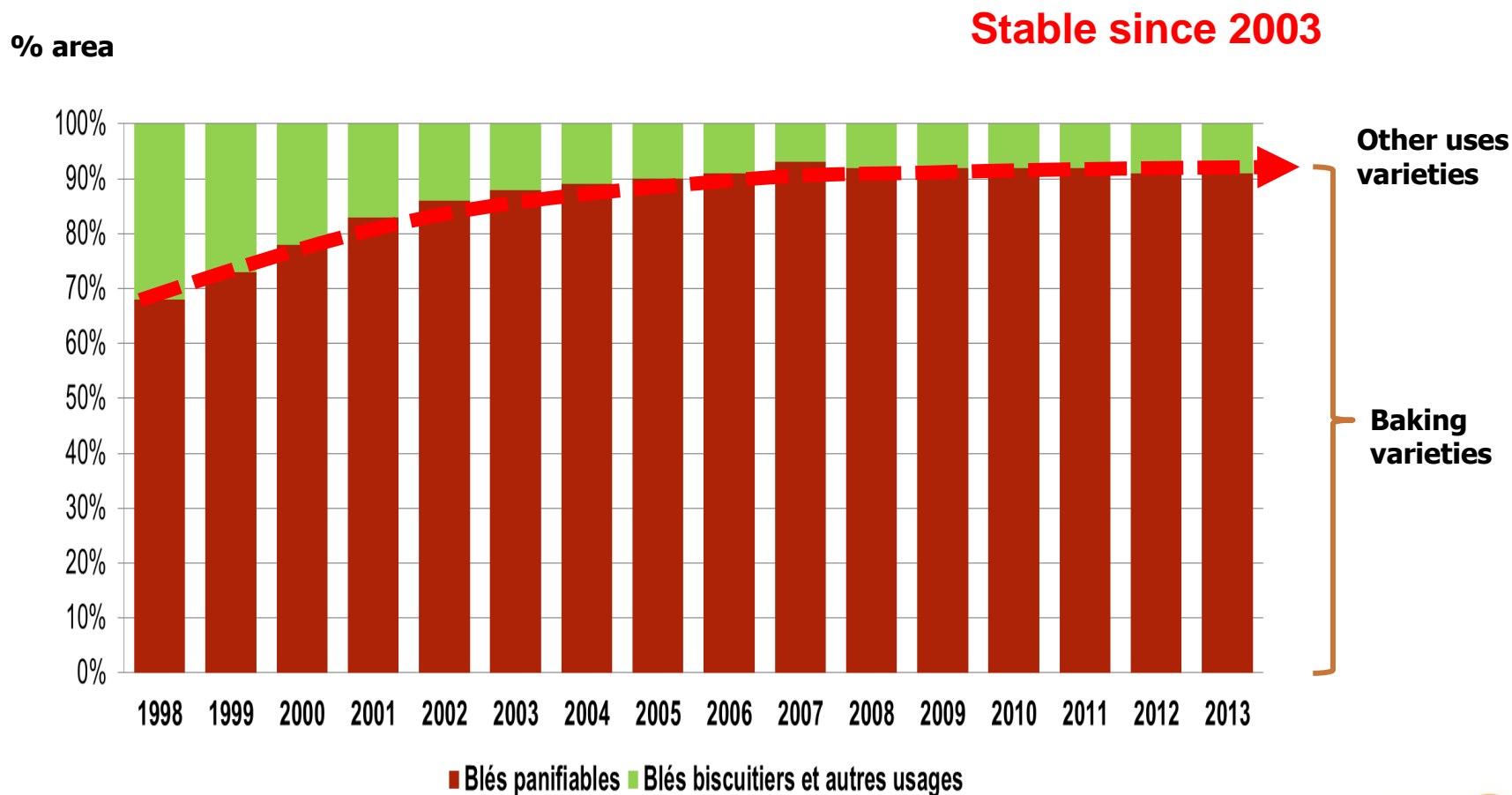


FranceAgriMer

ARVALIS
Institut du végétal

- A survey carried out jointly by Arvalis (technical Institute) and FranceAgriMer (French Ministry of Agriculture),
- 580 samples collected in silos,
- Analysed by Arvalis and FranceAgriMer,
- To give a overview of 2013 harvest quality : average values and distribution,
- The role of traders is to mix different batches to meet customer's requirements.

Most of wheat varieties seeded by French farmers suitable for bread making

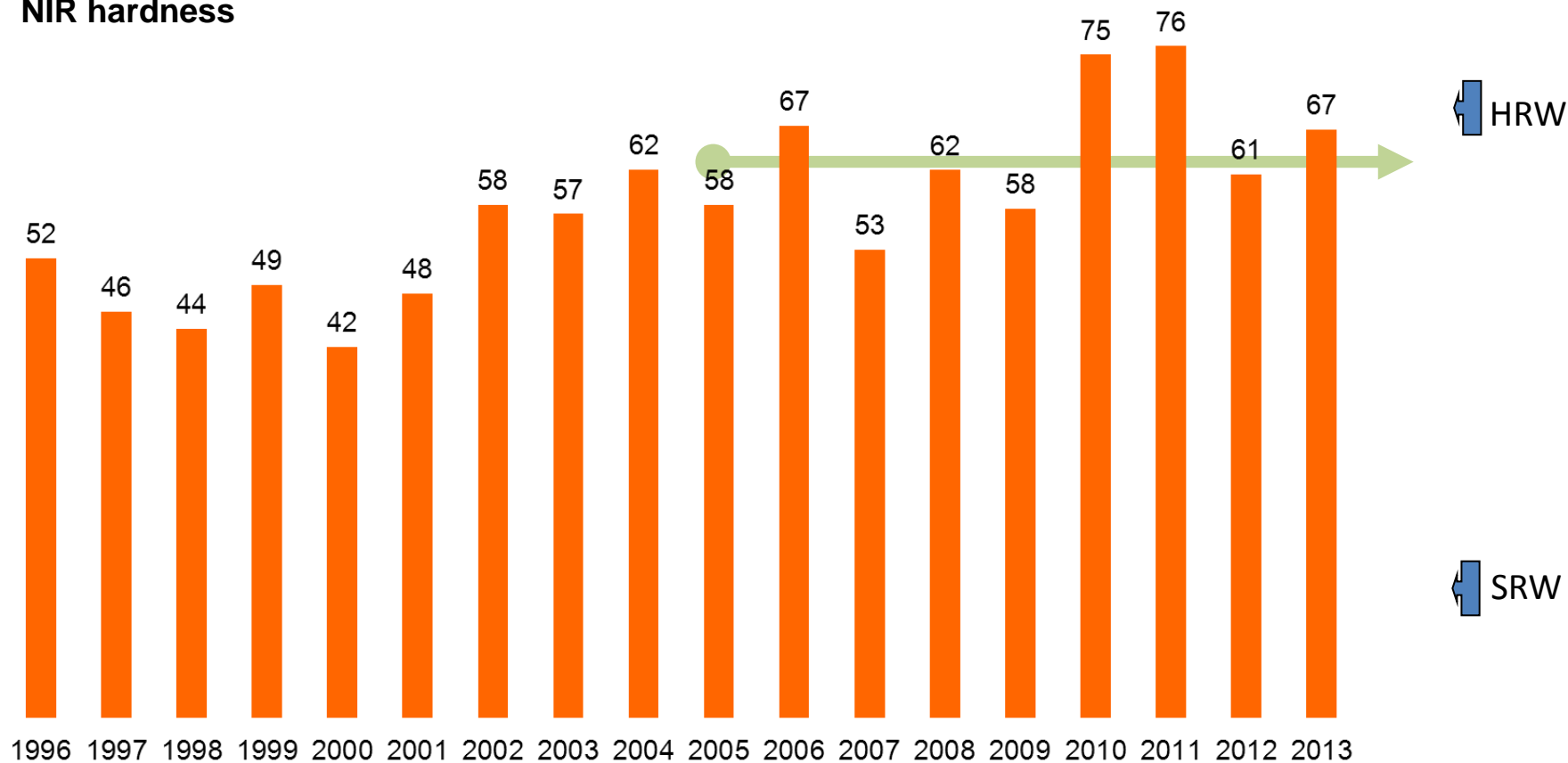


Source : FranceAgriMer enquêtes répartitions variétales 2013

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French milling wheat is Medium-Hard

NIR hardness

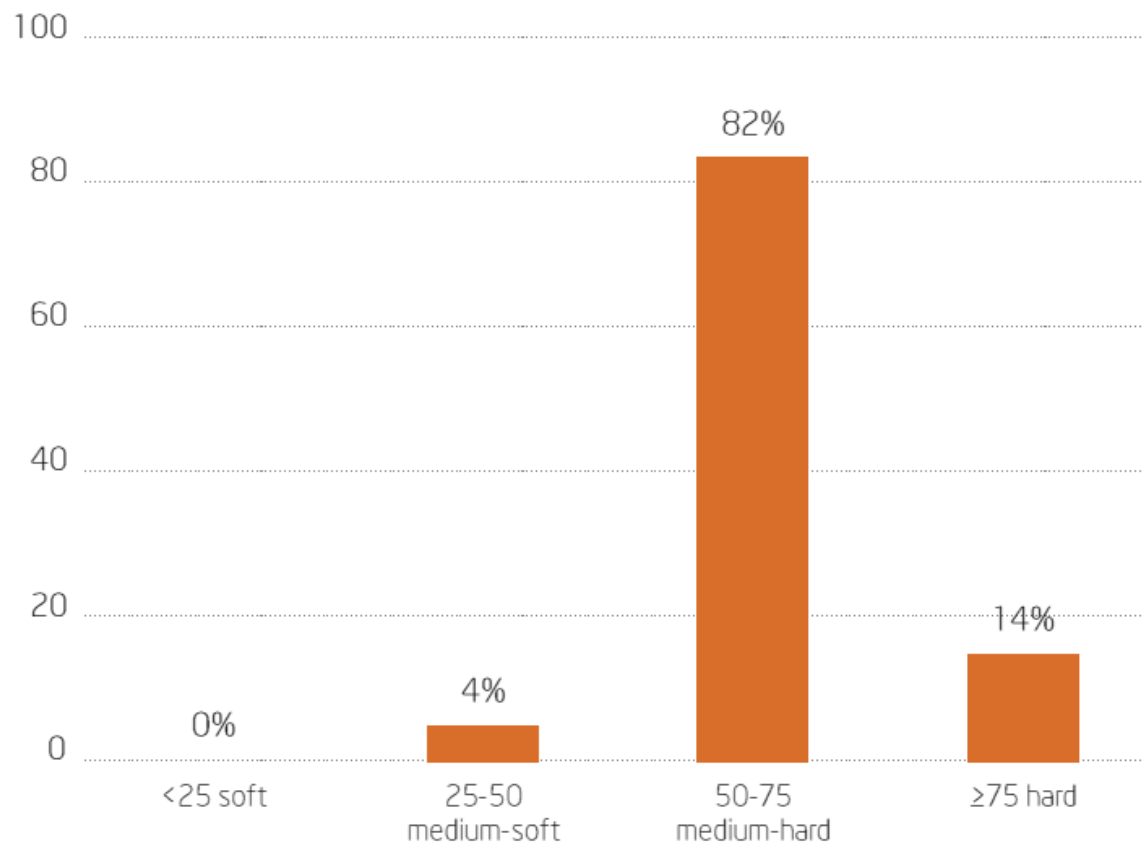


Source : FranceAgriMer Arvalis enquête variétale au champ 2013

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Most of French wheat is medium-hard

by % of surface analysed



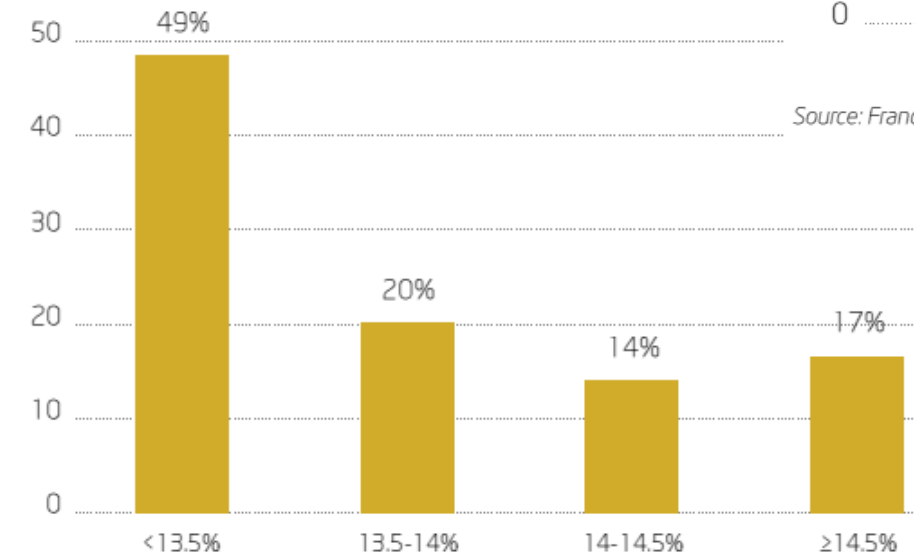
Source : FranceAgriMer / Inland silos survey 2013

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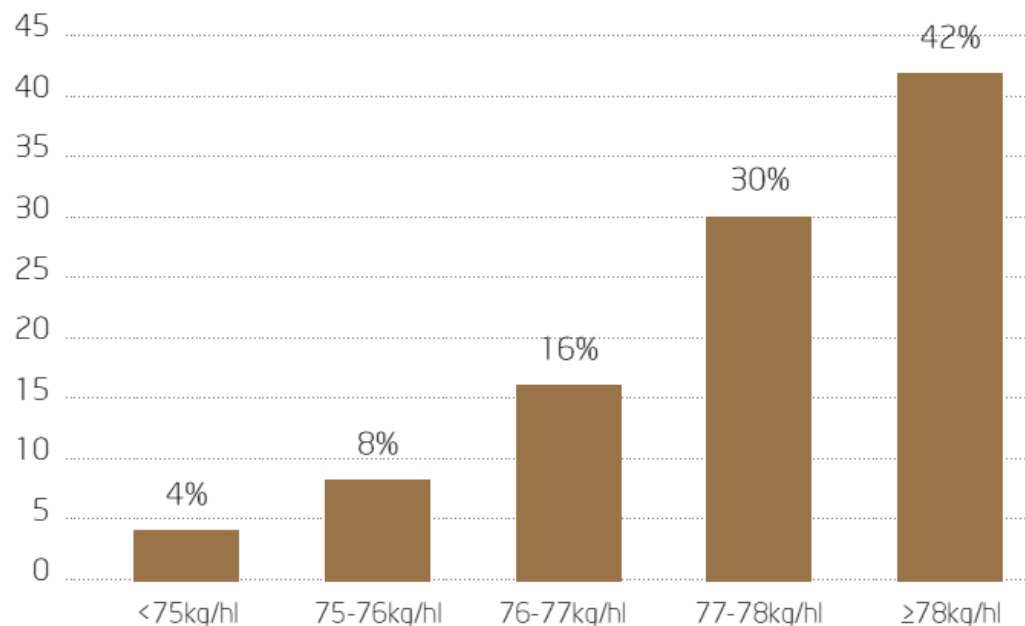
**Test weight:
77,6kg/hl on
average
(88%>76 kg/hl)**

by % of volume collected



Source: FranceAgriMer/Inland silos survey 2013

by % of volume collected

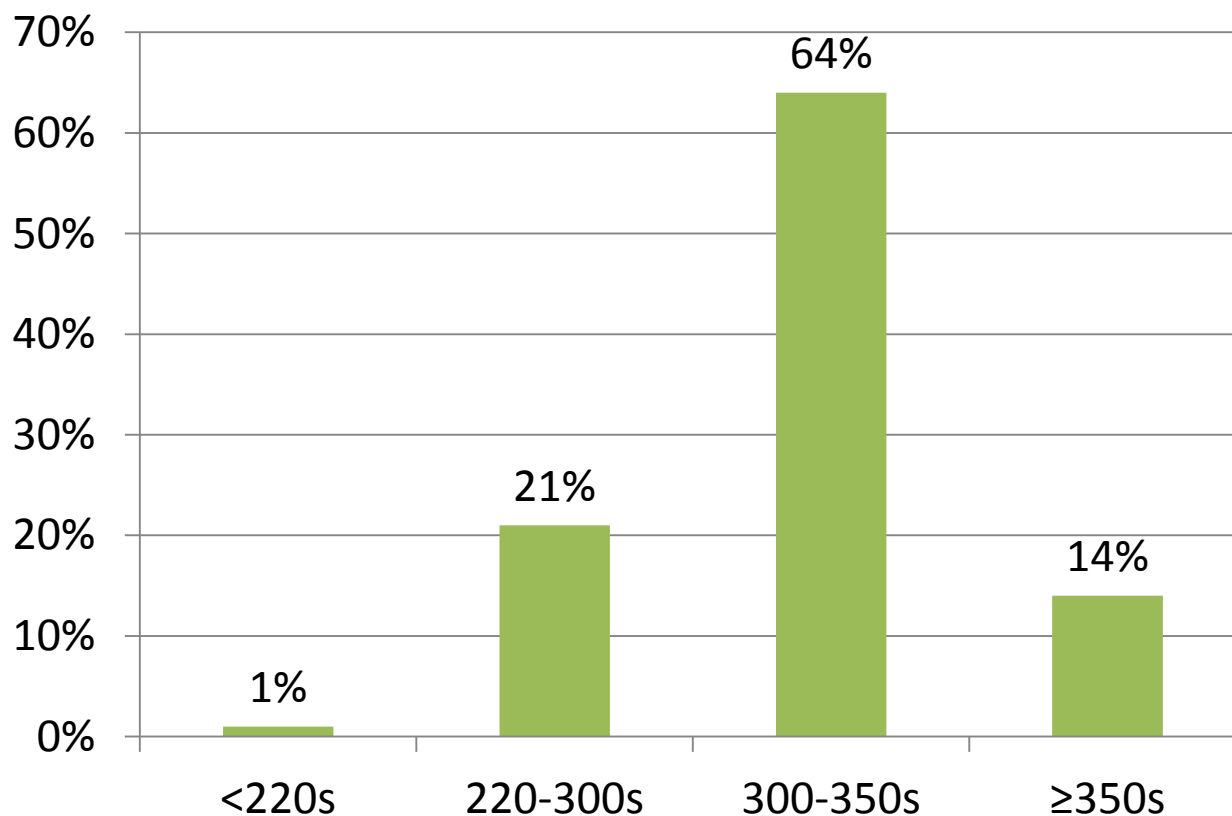


Source: FranceAgriMer/Inland silos survey 2013

**Moisture: 13,5%
on average**

Falling number: 99 % of wheat production \geq 220s

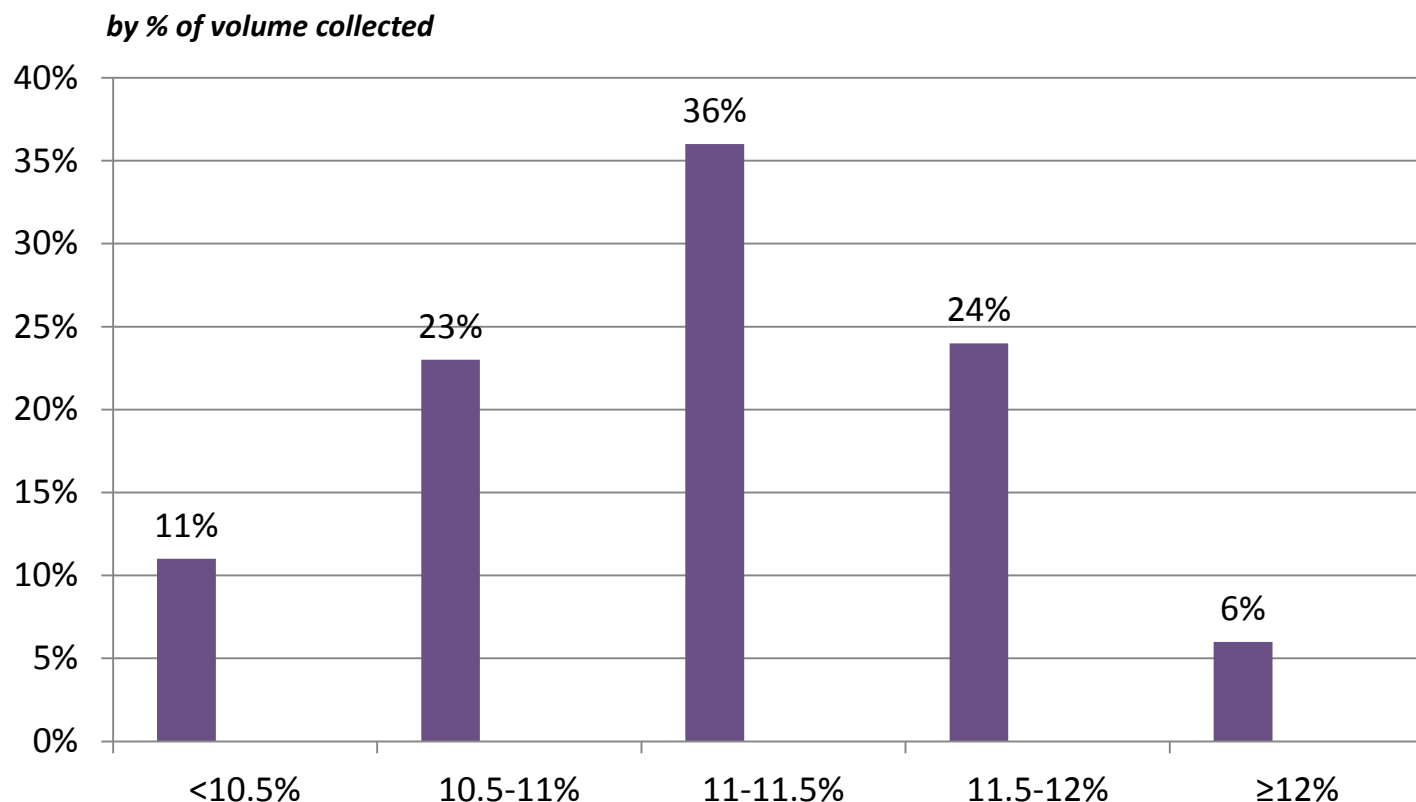
by % of volume collected



Source : FranceAgriMer / Inland silos survey 2013



Protein content (DM basis, Nx5.7): 11.2 % on average 66 % above 11 %

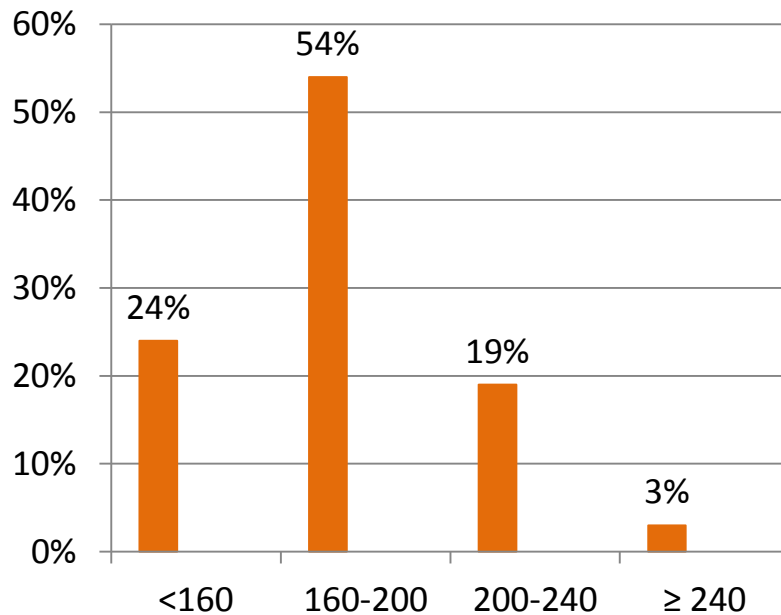


Source : FranceAgriMer / Inland silos survey 2013

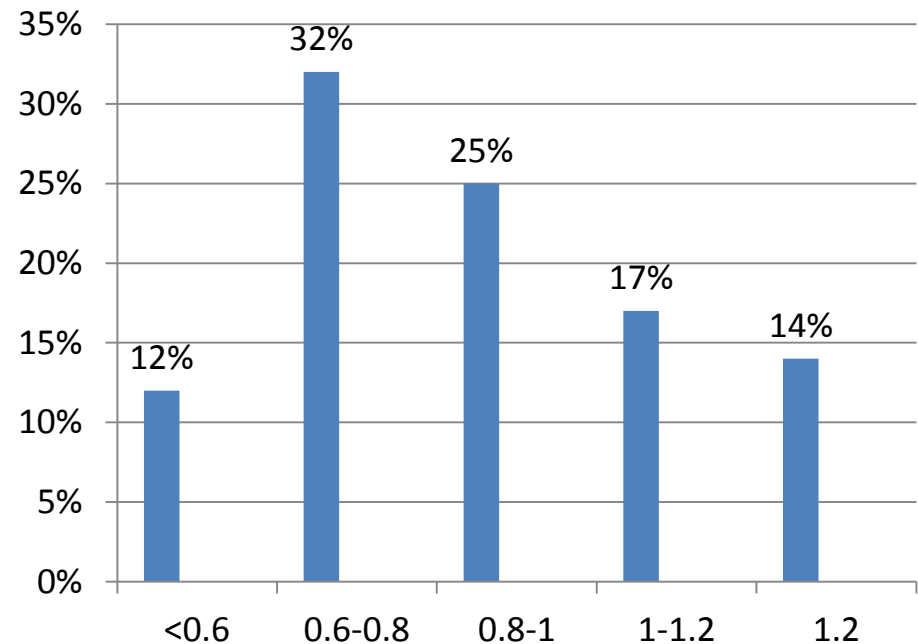


Alveographic characteristics

by % of volume collected



by % of volume collected



Baking Strength W of 180 on average (76% have $W > 160$)

Ratio P/L: almost 70% are under 1.0

Source : FranceAgriMer / Inland silos survey 2013

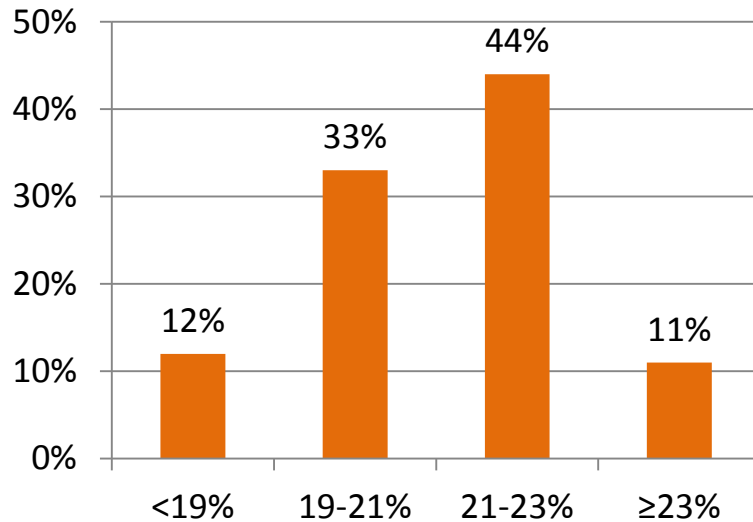
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High quality Gluten



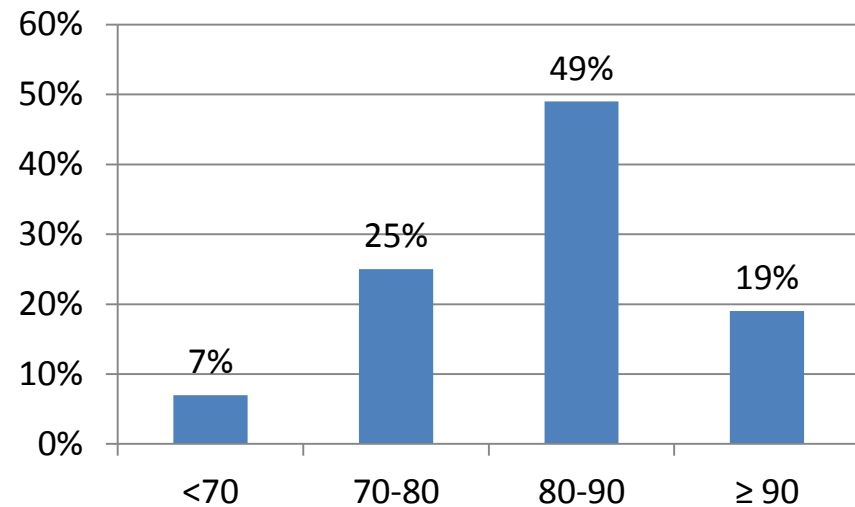
Wet gluten

by % of volume collected



Gluten index

by % of volume collected



Source : FranceAgriMer / Inland silos survey 2013

Conclusion about quality

- Most wheat grown in France is of milling quality,
- French wheat quality is quite stable from year to year. As usual, 2013 French wheat is characterized by an average protein and gluten content, but a high protein quality, and a high gluten index,
- 2013 French wheat is thus suitable, alone or combined with other origins, for a great variety of products like French baguette, but also different kinds of flat breads.





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Merci pour votre attention

Thanks for your attention

شکرا لانتباهکم

感谢关注

Os Merci vazam a atenção vótre

Gracias por su atención

Спасибо за ваше внимание

Danke für Ihre Aufmerksamkeit

با تشکر از توجه شما

