



les céréales françaises : pour les marchés du monde



2012-2013 French outlook

**23rd Annual IAOM MEA District Conference,
5-8 December 2012, Abu Dhabi, UAE**

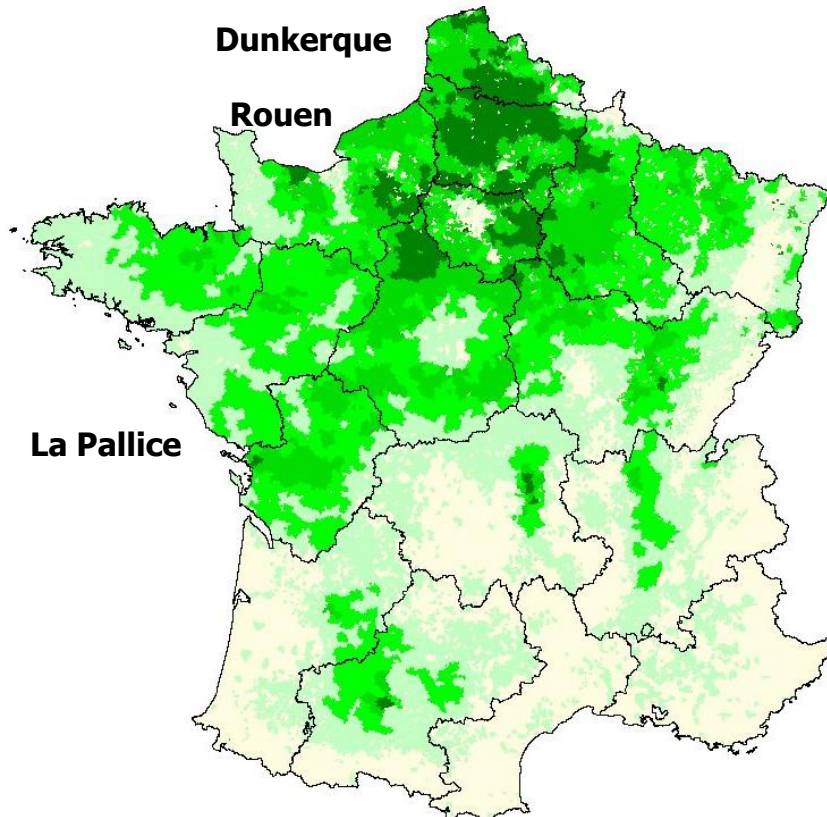


François Gâtel

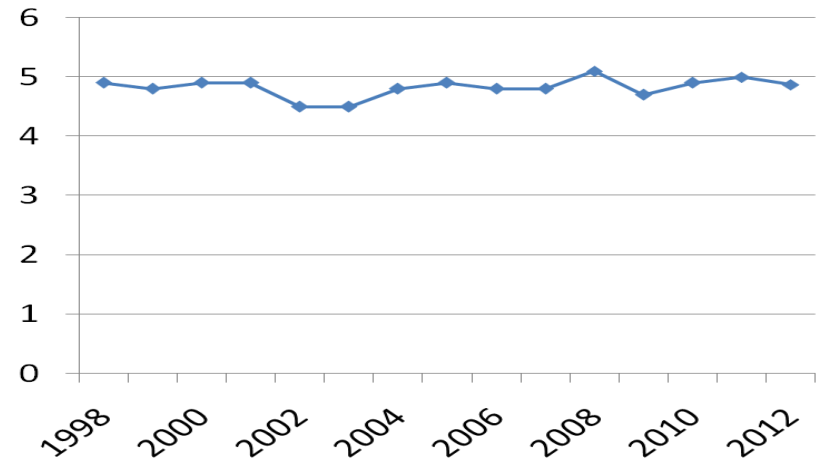
Evolution of wheat area (Mons ha)

Slight decrease in 2012 (-2% vs. 2011)

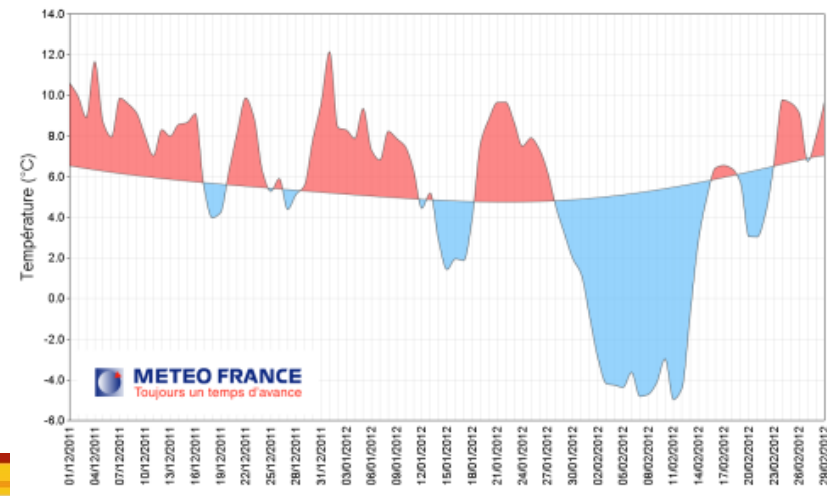
due to freeze damage in the eastern part of the country in February

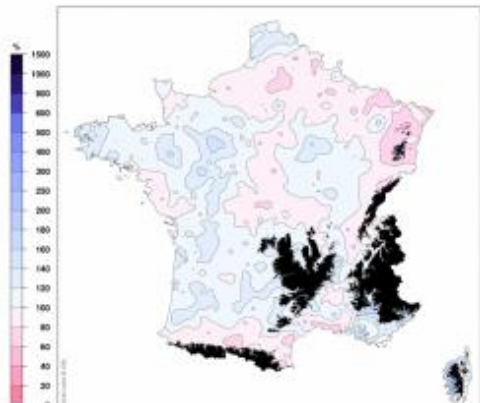


Wheat collecting density (FranceAgriMer)

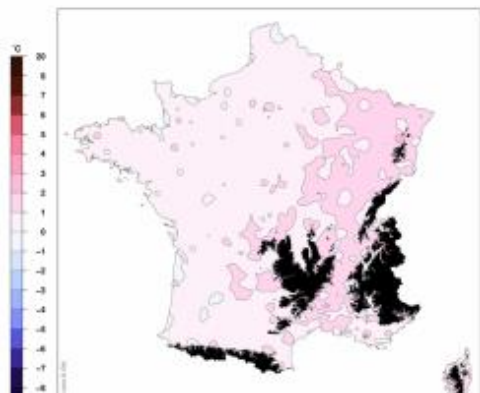


Evolution de la température en France au cours de l'hiver 2011-2012

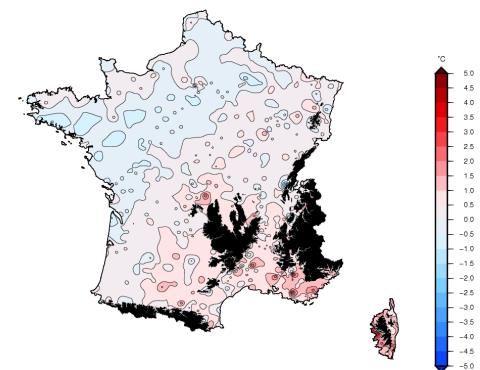




Température moyenne : printemps 2012
Ecart à la moyenne de référence 1981-2010

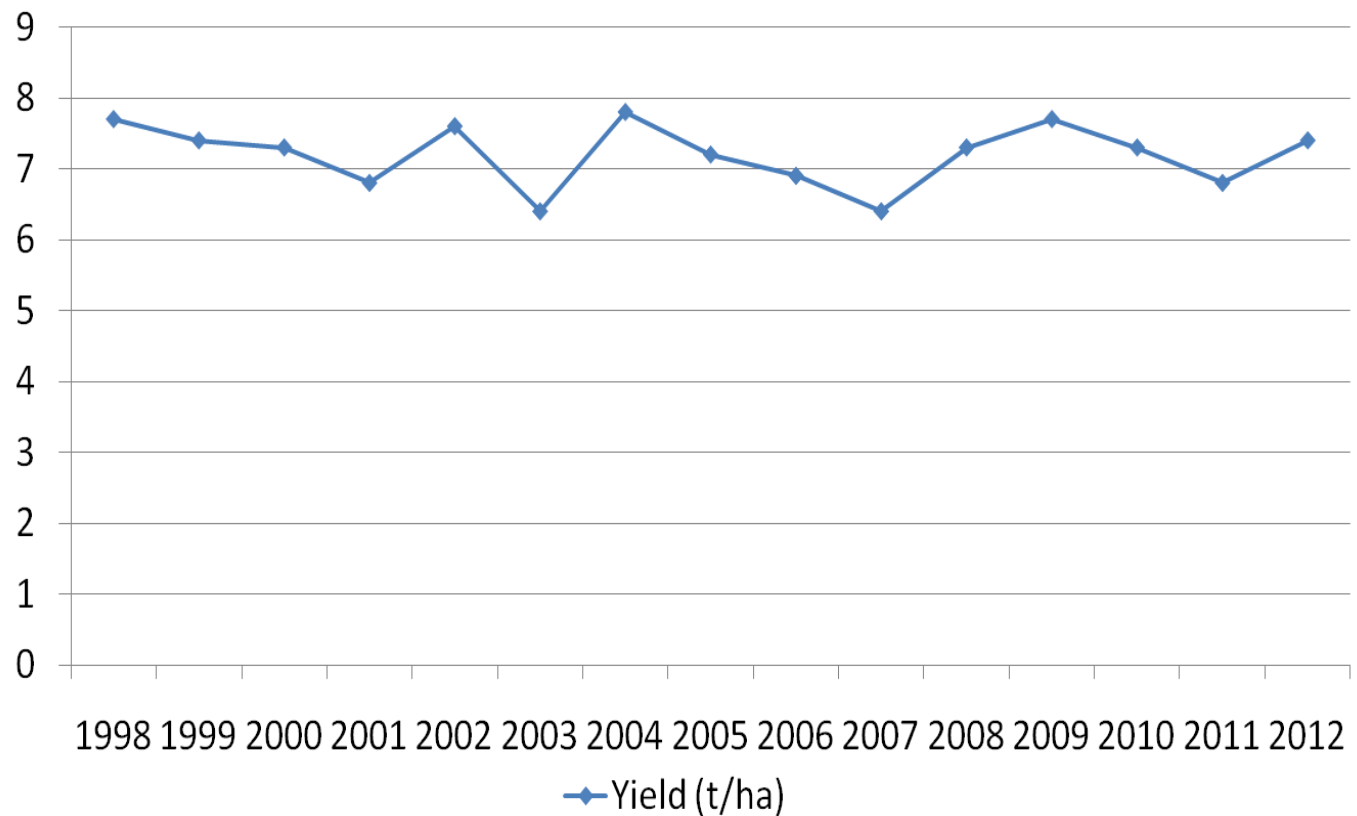


Température moyenne : été 2012
Ecart à la moyenne de référence 1981-2010



Evolution of wheat yield (t/ha)

High yields in 2012 (7.4 t/ha vs. 6.8 t/ha in 2011) Due to mild and rainy spring

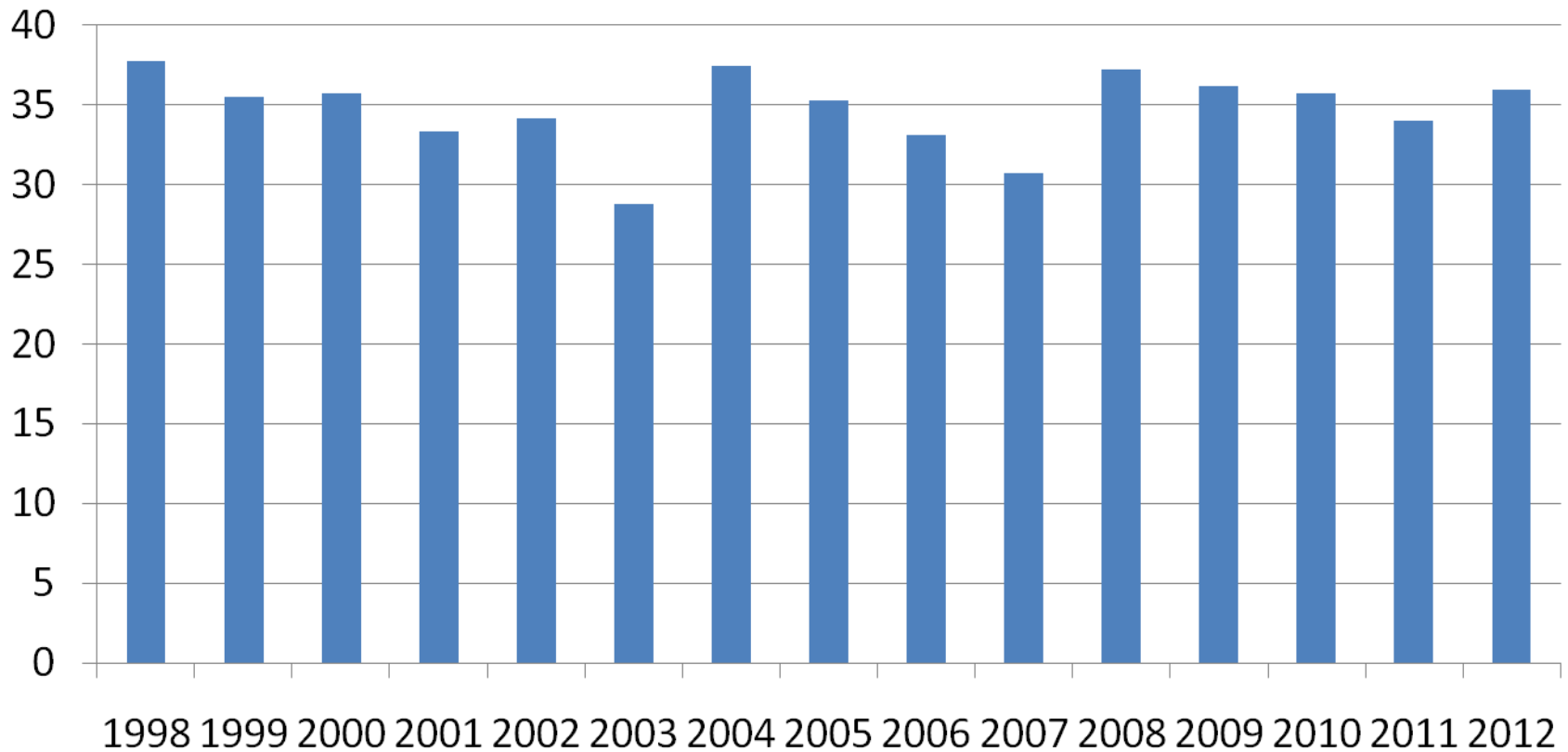


Source FranceAgriMer Oct 2012

French wheat production (Mons t)

36 Mons t in 2012 (vs. 34 Mons t in 2011)

An increased availability (+ 2 Mons t) in a tight market



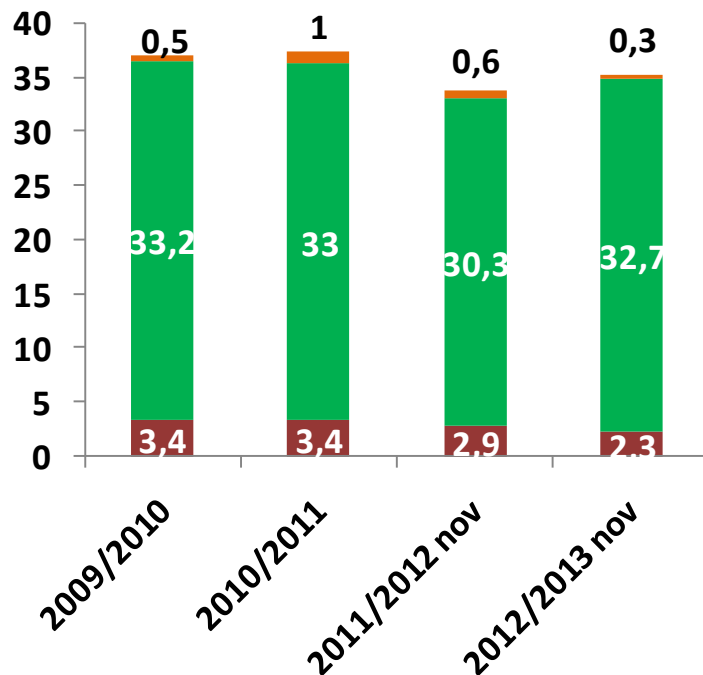
■ Production (Mons t)



French wheat balance

Depending on collecting rate and export to EU,
Export to countries outside EU is forecasted between 9.5 and 11 Mons t

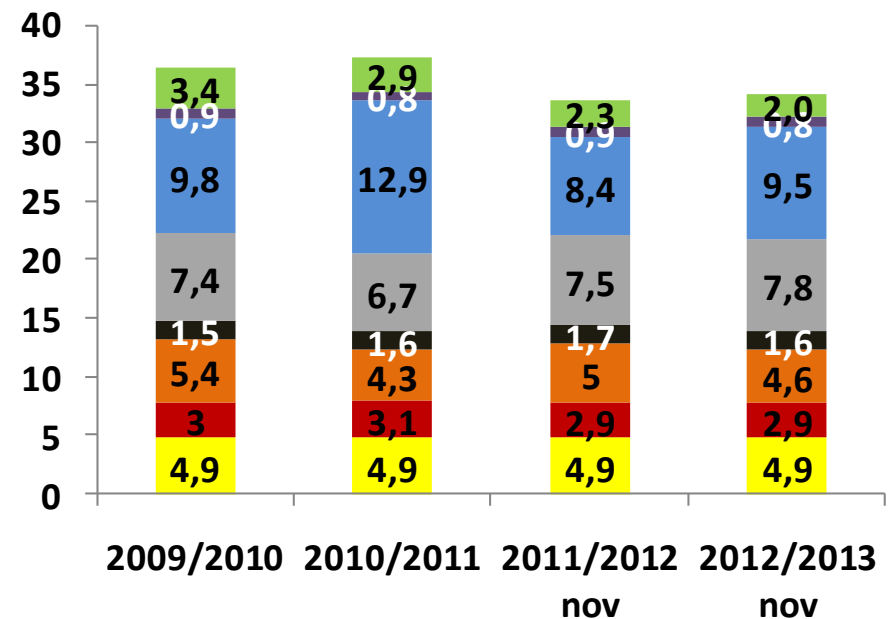
Mt



■ Carry In Stock ■ Collecting ■ Import

Mt

■ Milling Industry ■ Starch industry ■ Feed Industry
■ Ethanol ■ Export EU ■ Export outside EU
■ Flour export ■ Carry Out Stock



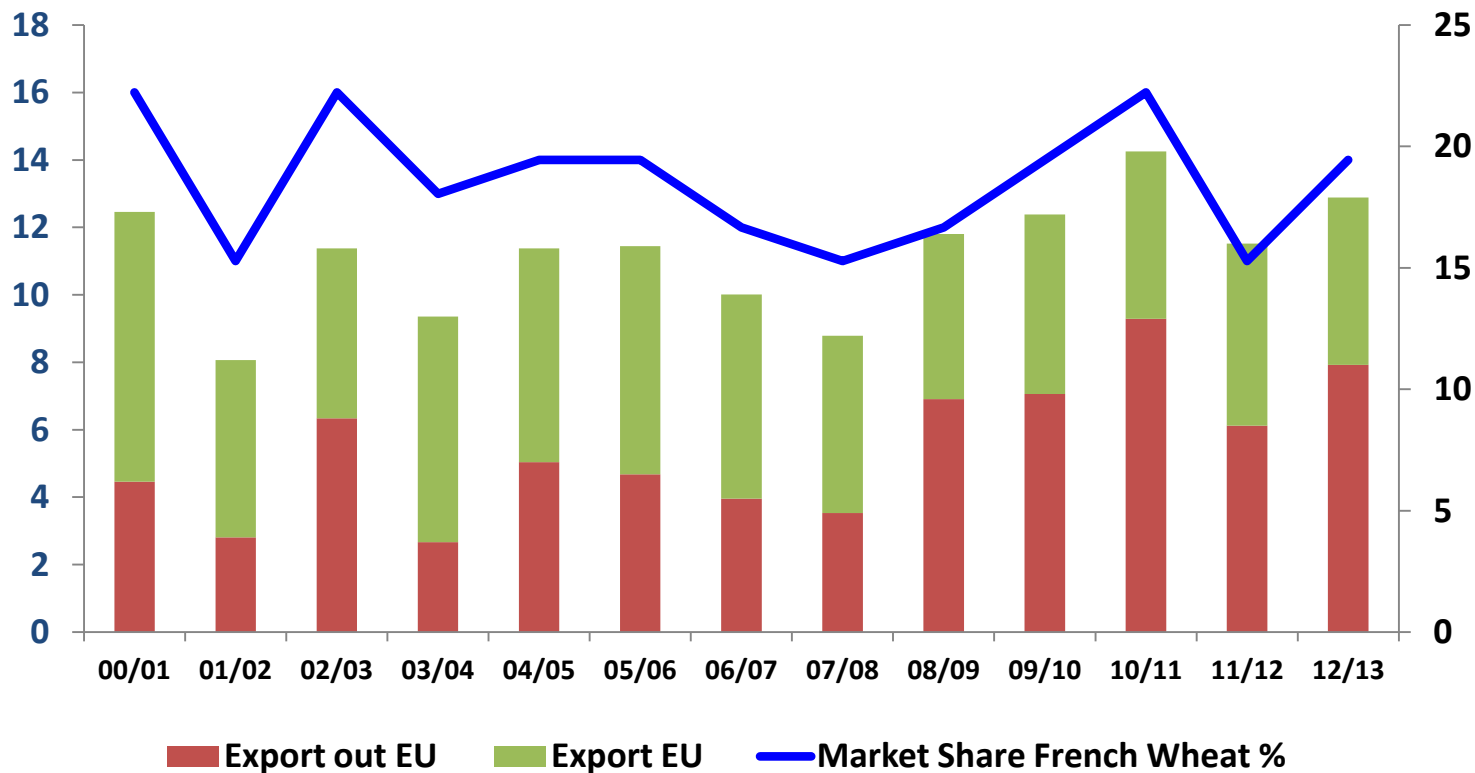
Source FranceAgriMer Nov 2012

5

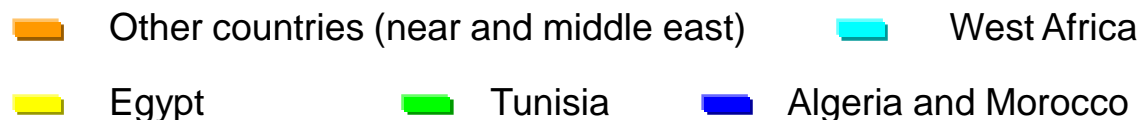
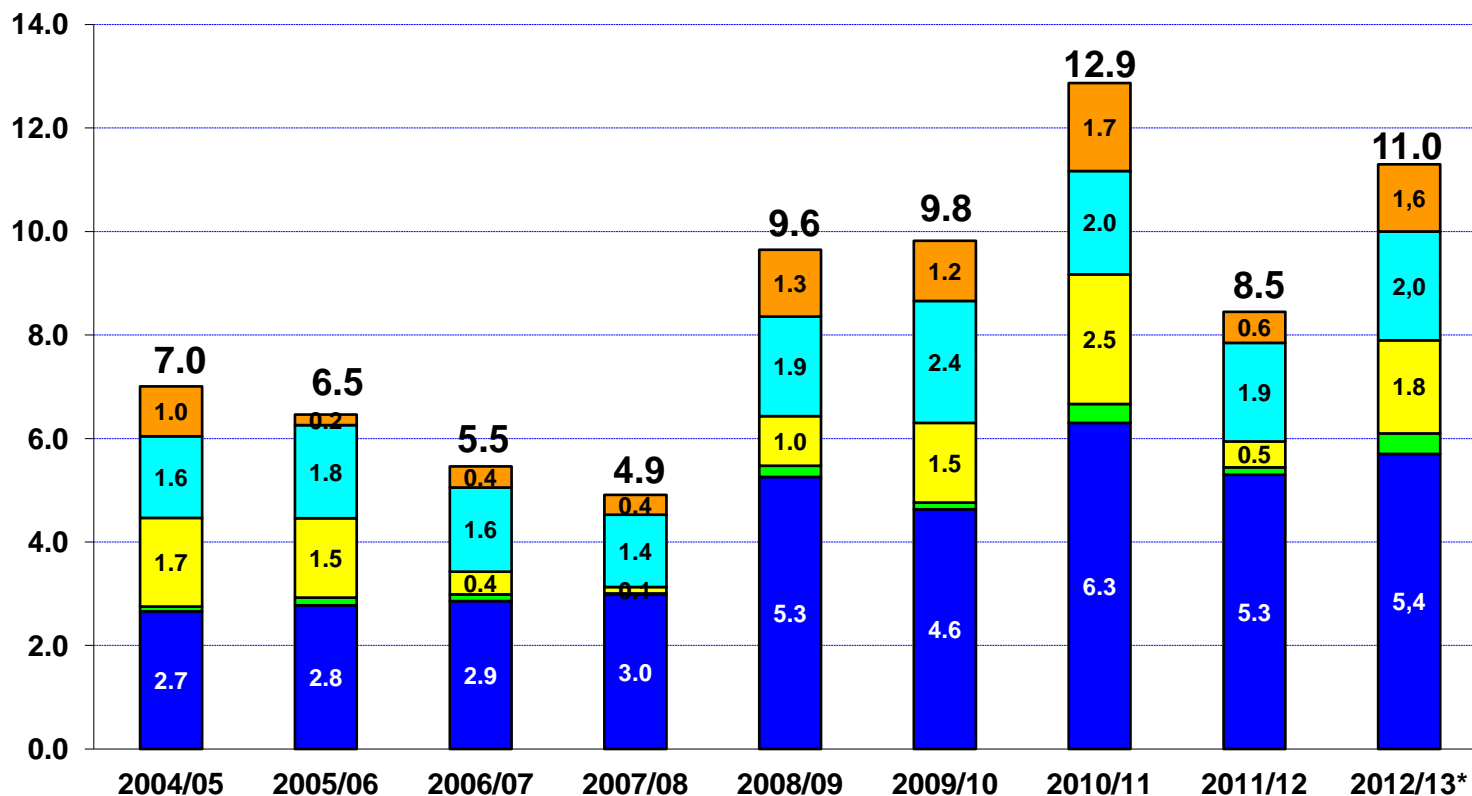
World market share of French wheat (including EU exchanges)

Market Share %

Exports Mont



Main customers for French wheat outside EU

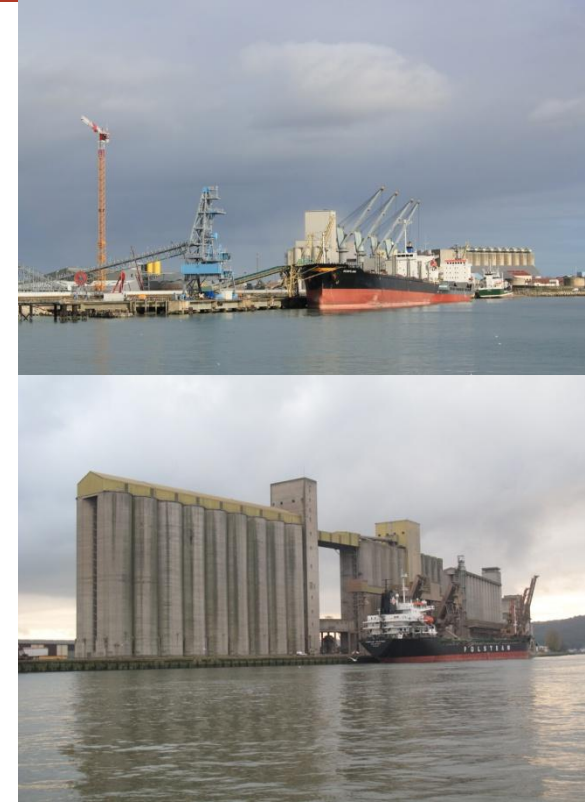


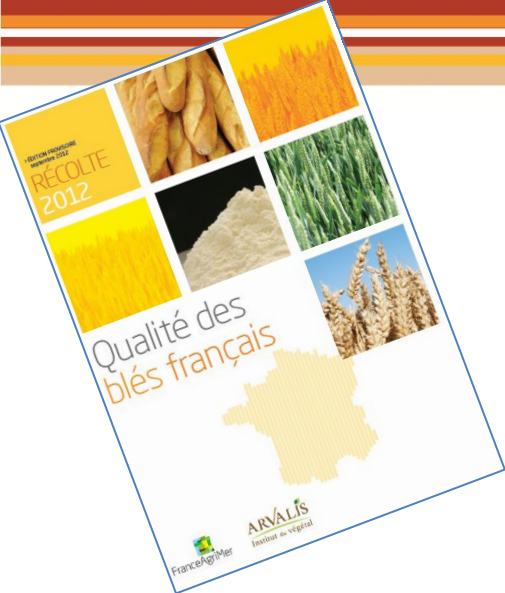
French wheat exports' to November 15th (Mons t)

	Forecasted	Commitement	Loaded
Algeria	3.550	1.919	1.519
Morocco	1.800	0.328	0.328
Tunisia	0.190	-	-
Egypt	1.800	0.723	0.063
Western Africa	2.039	0.885	0.885
Middle East	0.680	0.137	0.137
Cuba	0.450	0.148	0.148
Other	0.441		
Total	10.950	4.186	3.101

Conclusion 1

- France is one of the first wheat producing countries 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 2012-2013 marketing year, French production is 2.1 million tons more than last year, available for the export market,
- Purchase of French wheat is always free, with no restriction to exports.



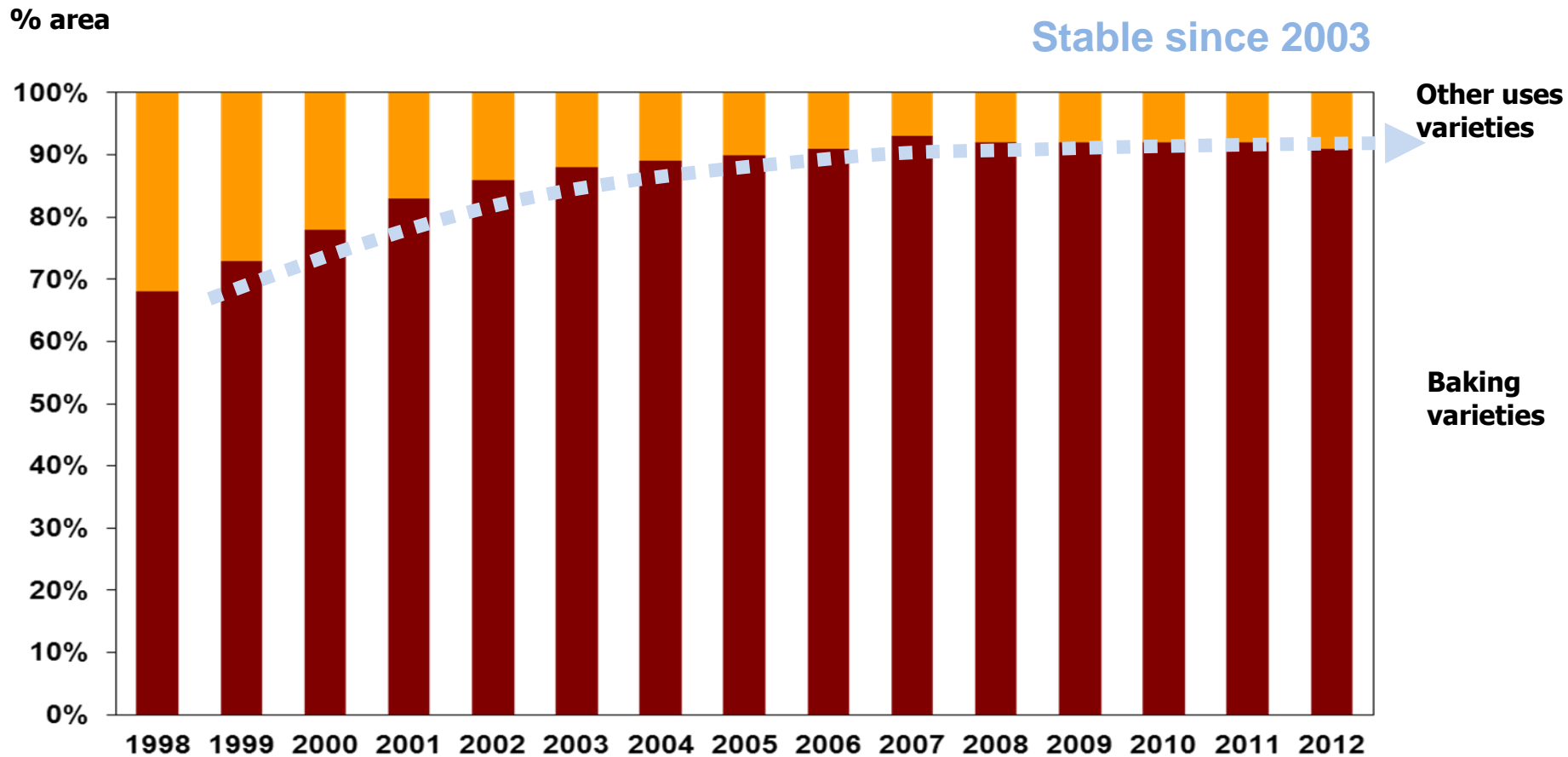


2012 French wheat quality



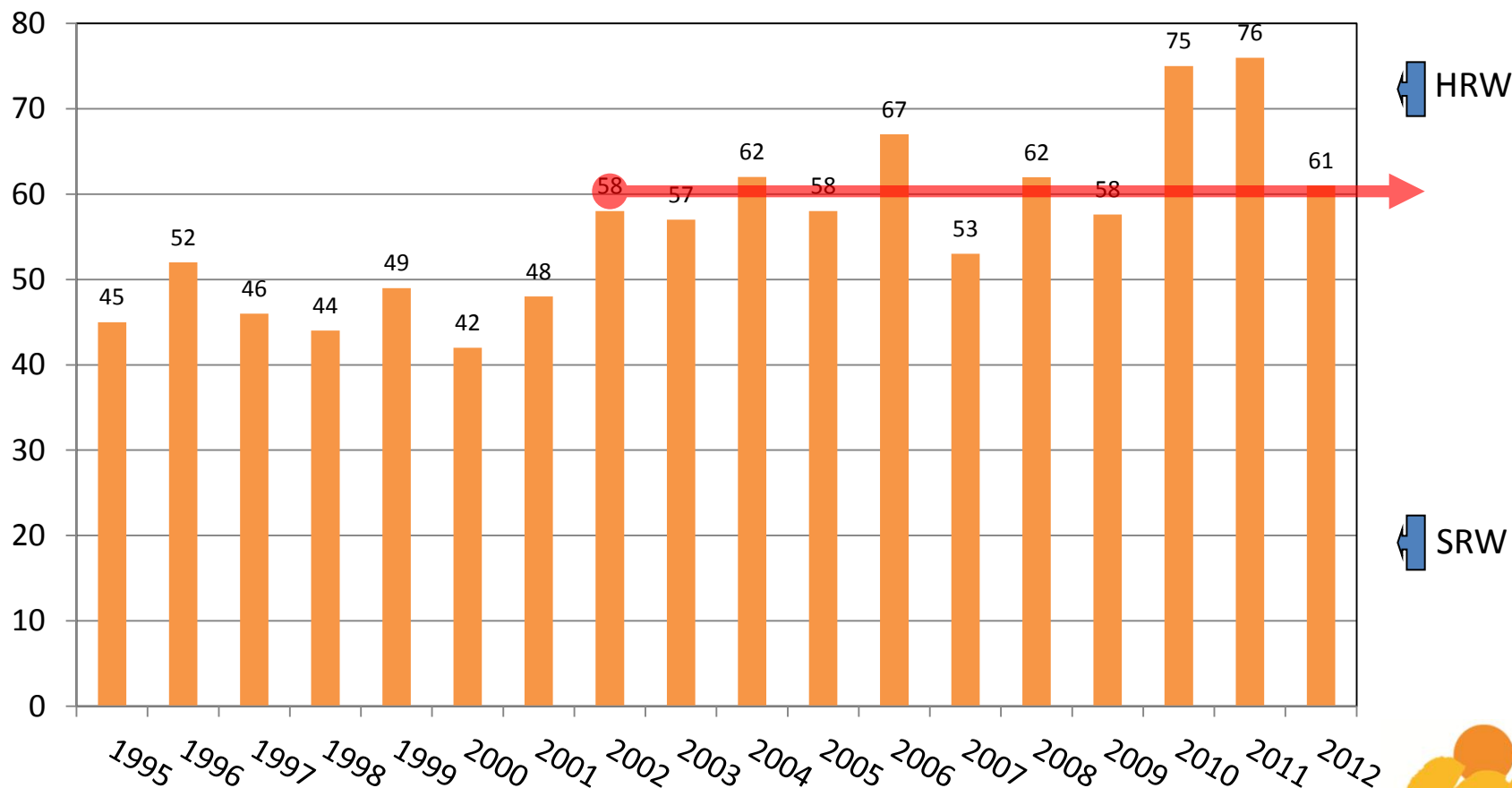
- A double survey carried out by Arvalis (technical Institute) and FranceAgriMer (French Ministry of Agriculture),
- 1320 samples collected in the fields,
- 600 samples collected in silos,
- Analysed by Arvalis and FranceAgriMer,
- To give a overview of 2012 harvest quality : average values and distribution,
- The role of traders is to mix different batches to meet customer's requirements.

Most of wheat varieties suitable for bread making



Return to usual hardness level: médium-hard

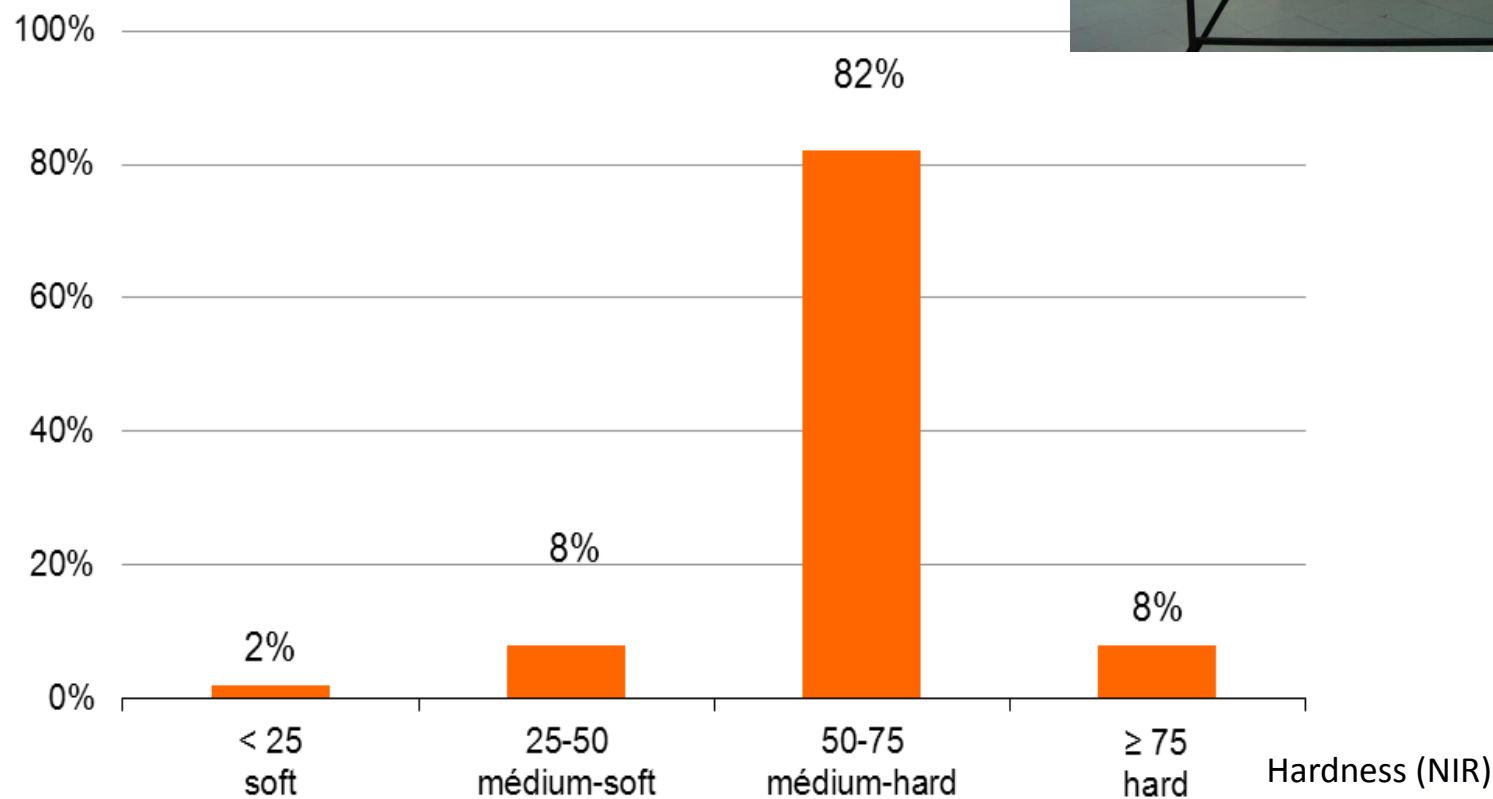
NIR hardness



Source : FranceAgriMer Arvalis enquête variétale au champ 2012

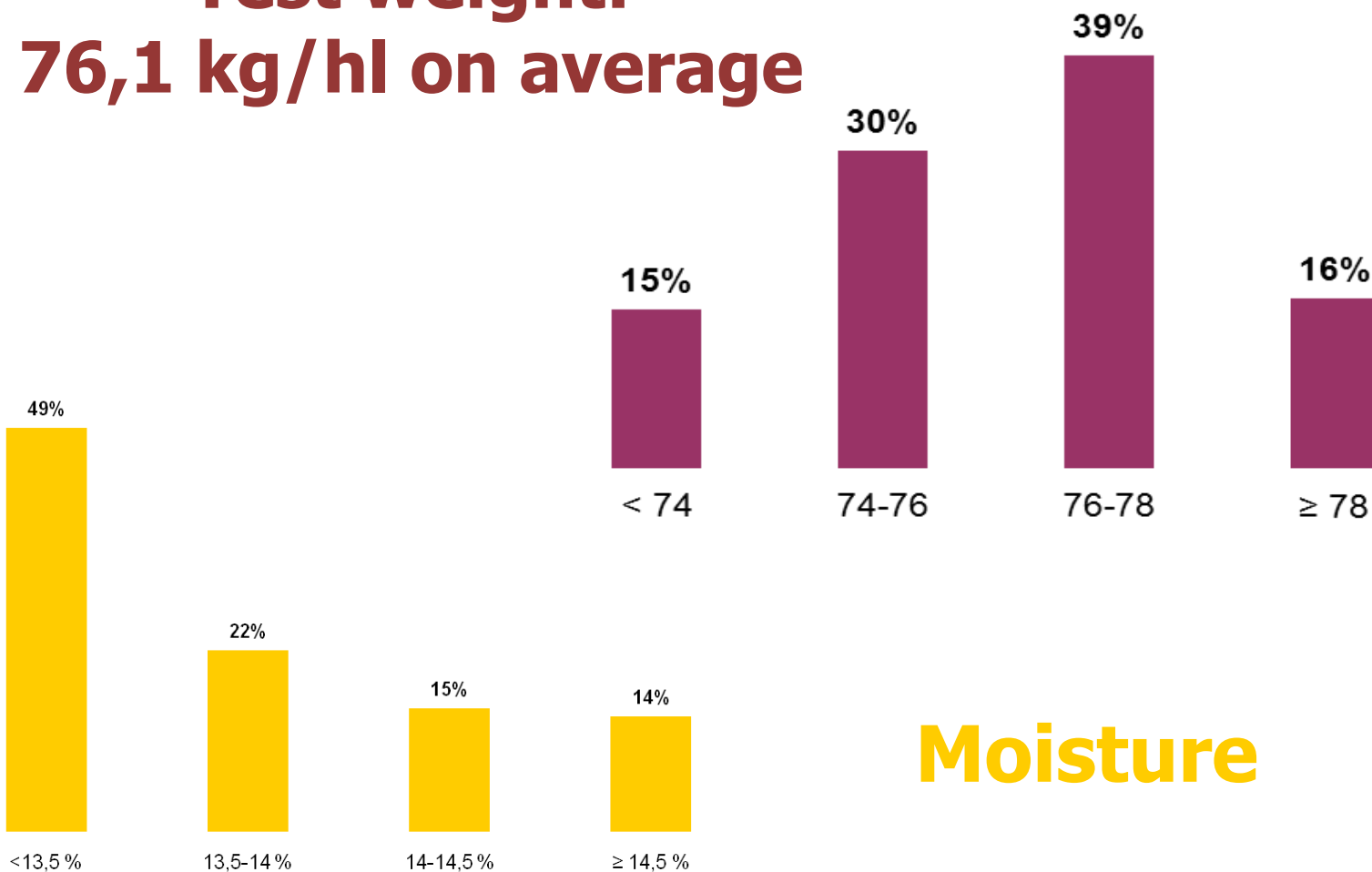
12

Most of French wheat is medium-hard

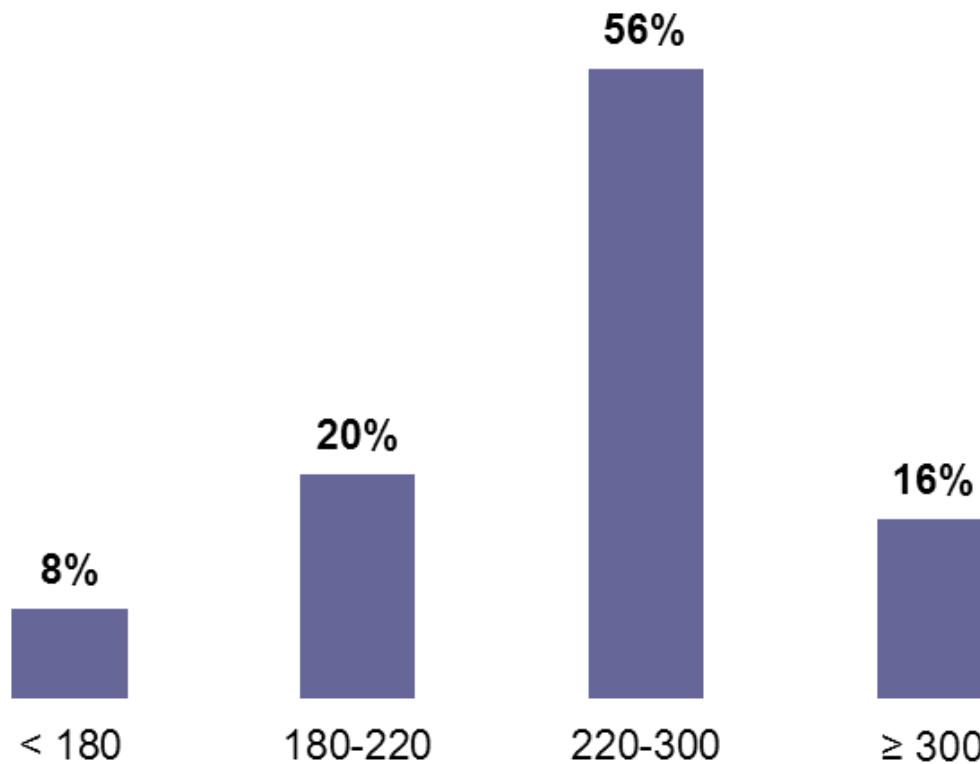




Test weight: 76,1 kg/hl on average

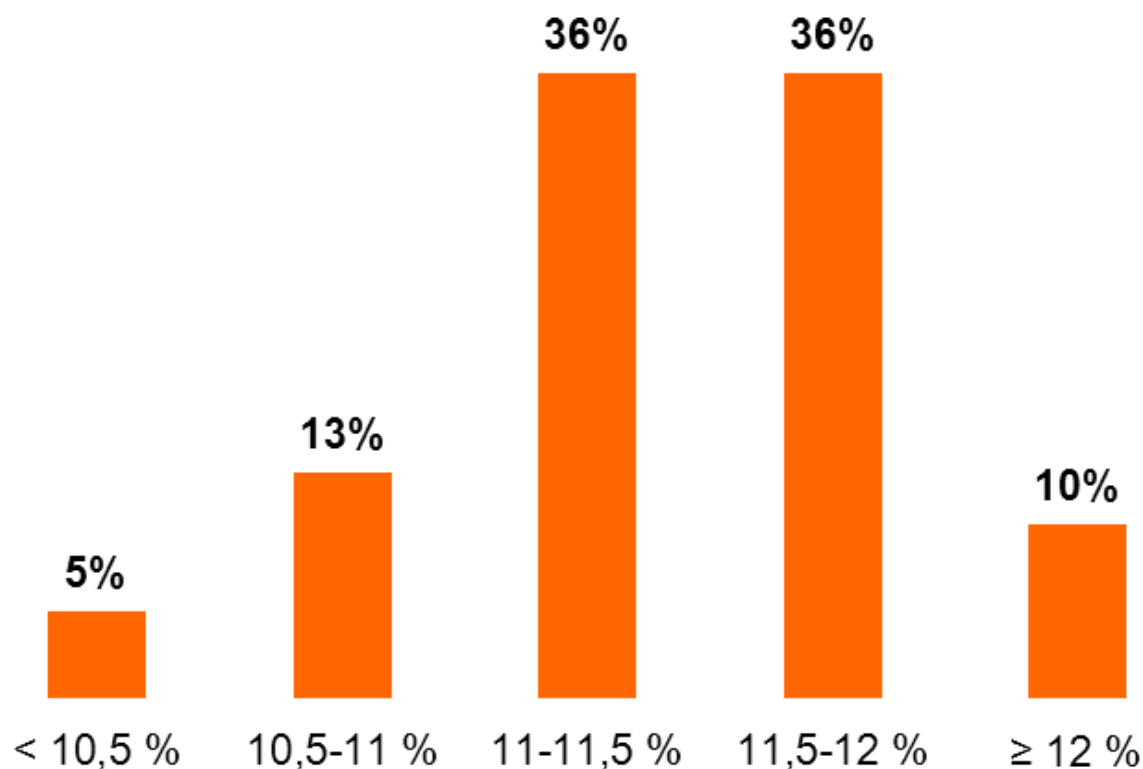


Falling number: 72 % \geq 220s



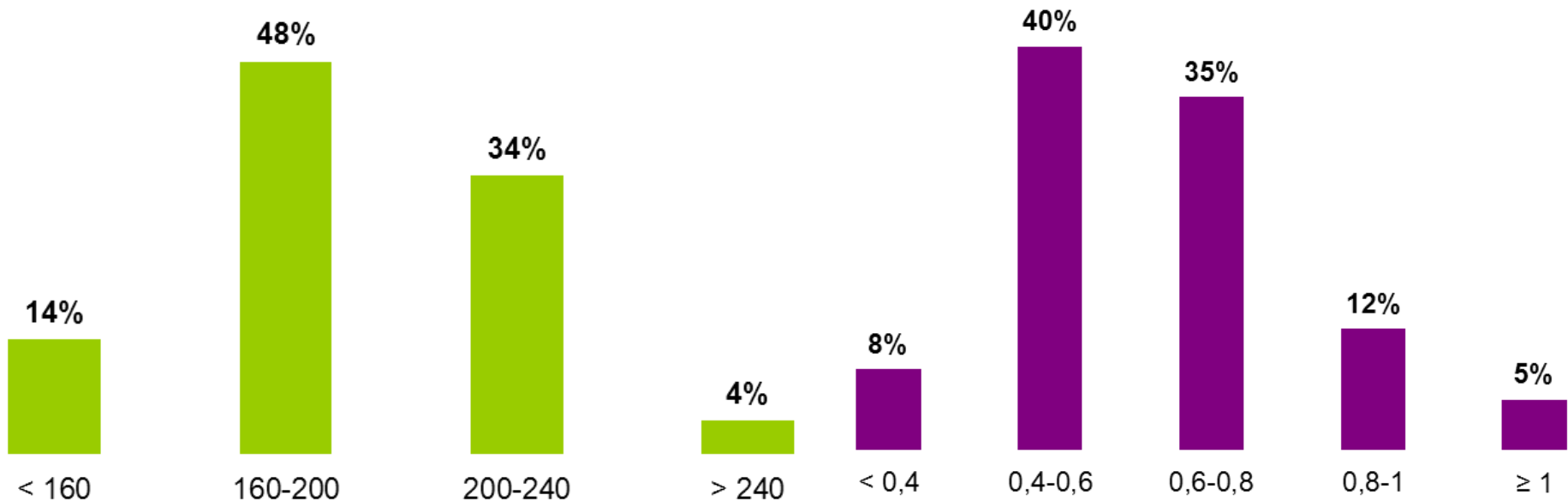


Protein content (% DM, Nx5.7): 11.4 % en average 82 % above 11 %





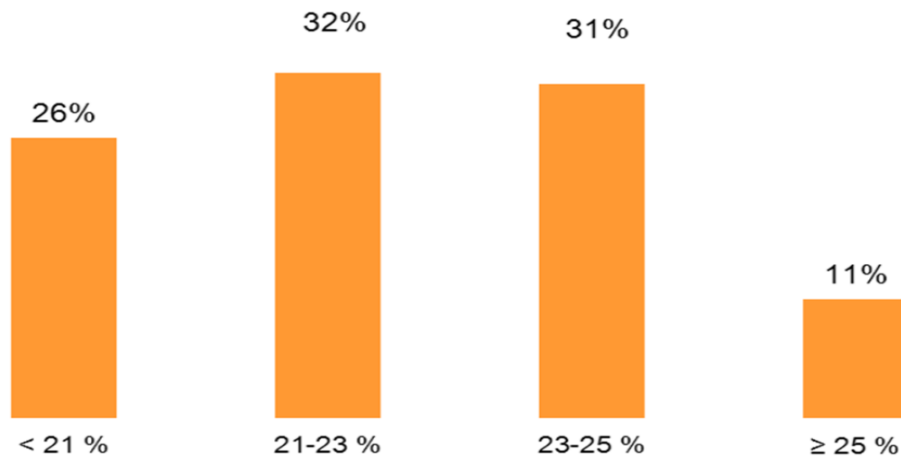
Alveographic characteristics



Baking Strength W

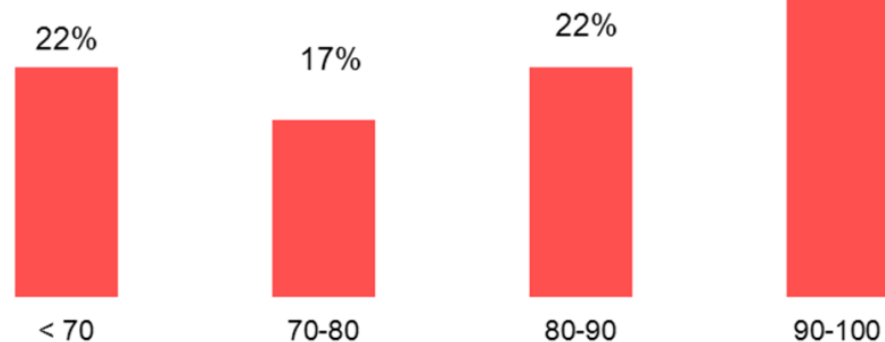
Configuration ratio P/L

Gluten



Wet gluten

Gluten index



Conclusion 2

- Most wheat grown in France is of milling quality,
- French wheat quality is quite stable from year to year. As usual, 2012 French wheat is characterized by an average protein and gluten content, but a high protein quality, and a high gluten index,
- 2012 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

