



French cereals:
for world markets



French Wheat Quality

**20th Annual IAOM Mideast & Africa District Conference
Antalya, Turkey, october 23 – 26 2009**

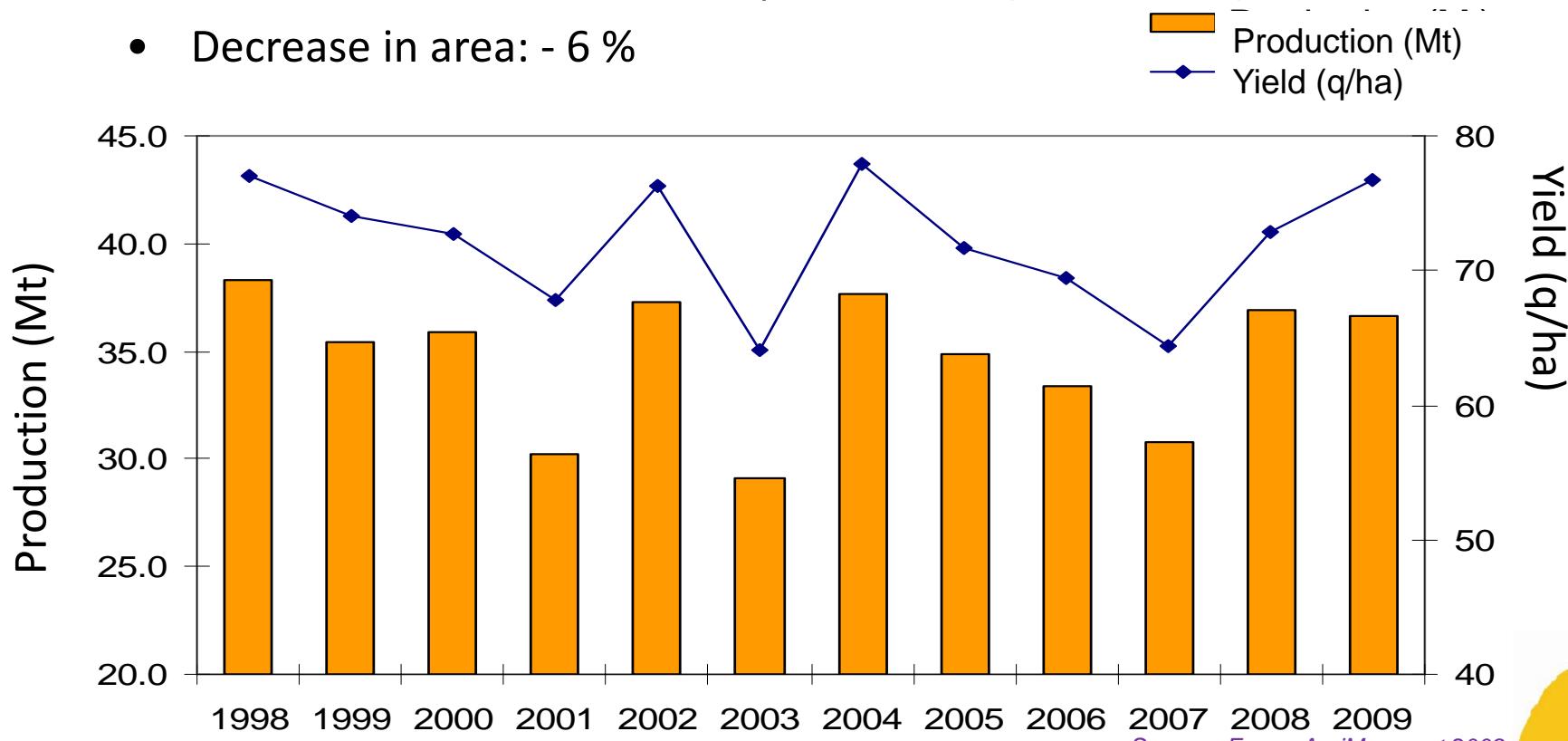


François GATEL



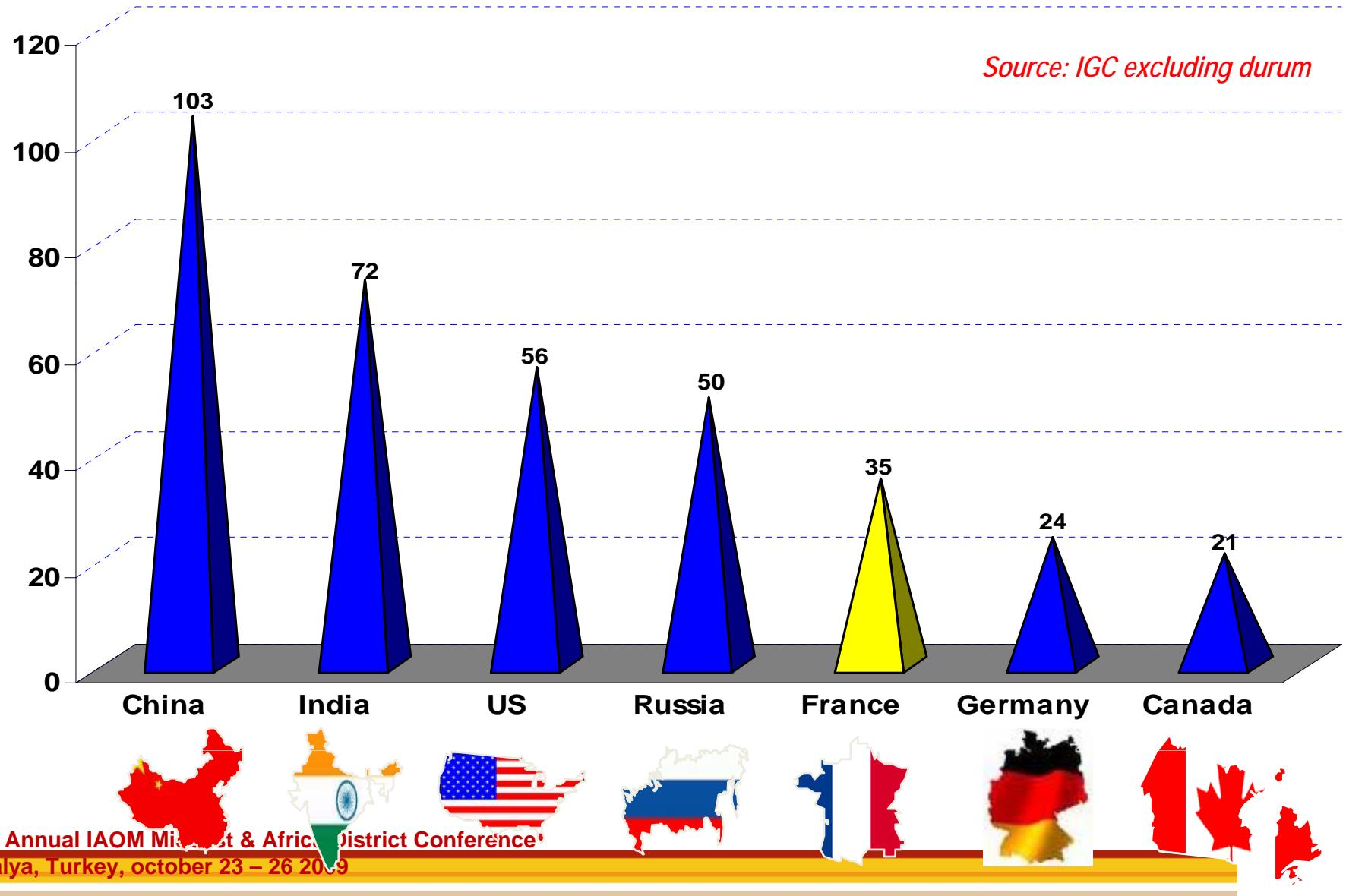
A high level of production : 36.6 Mt

- Increase in Yield: + 0.4 t/ha up to 7.7 t/ha (7.3 in 2008)
- Decrease in area: - 6 %



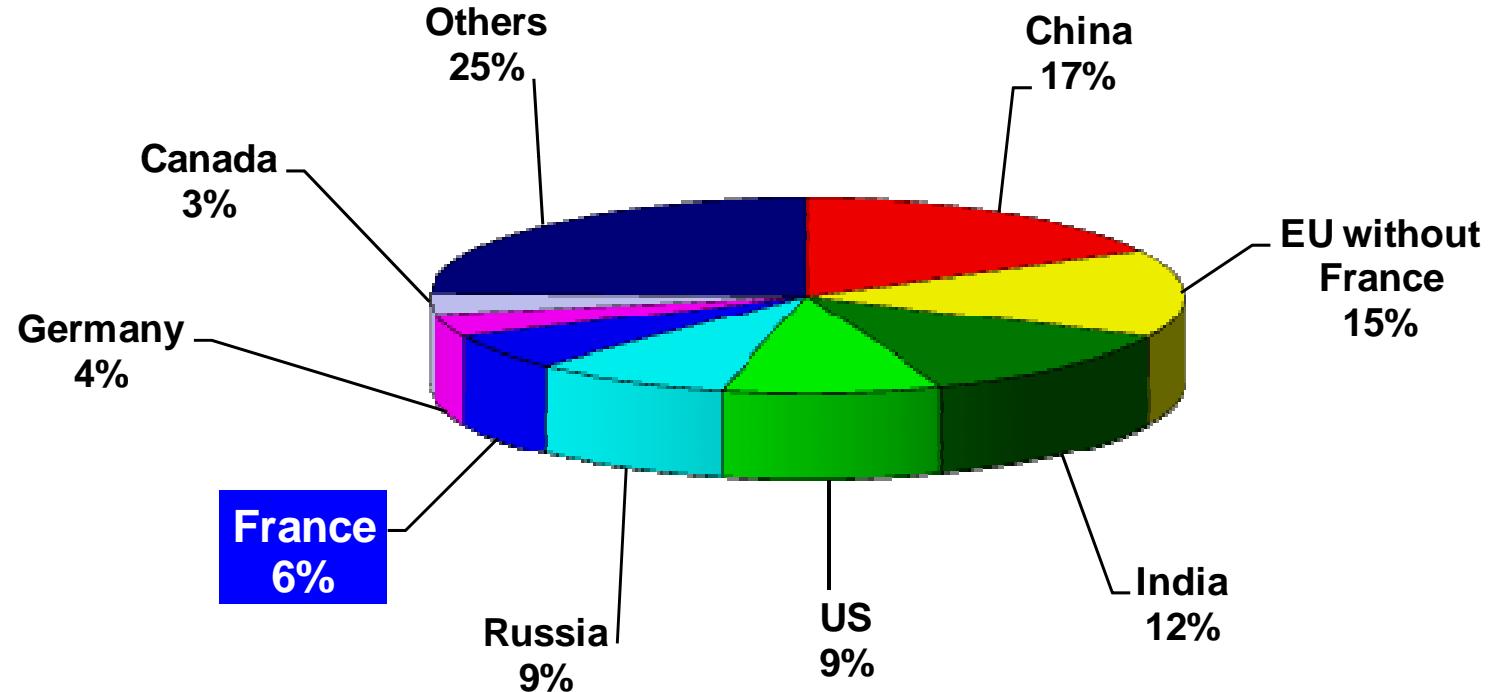
France: the fifth wheat* producer in the world

(Average of 5 marketing years : from 2004/05 to 2008/09)



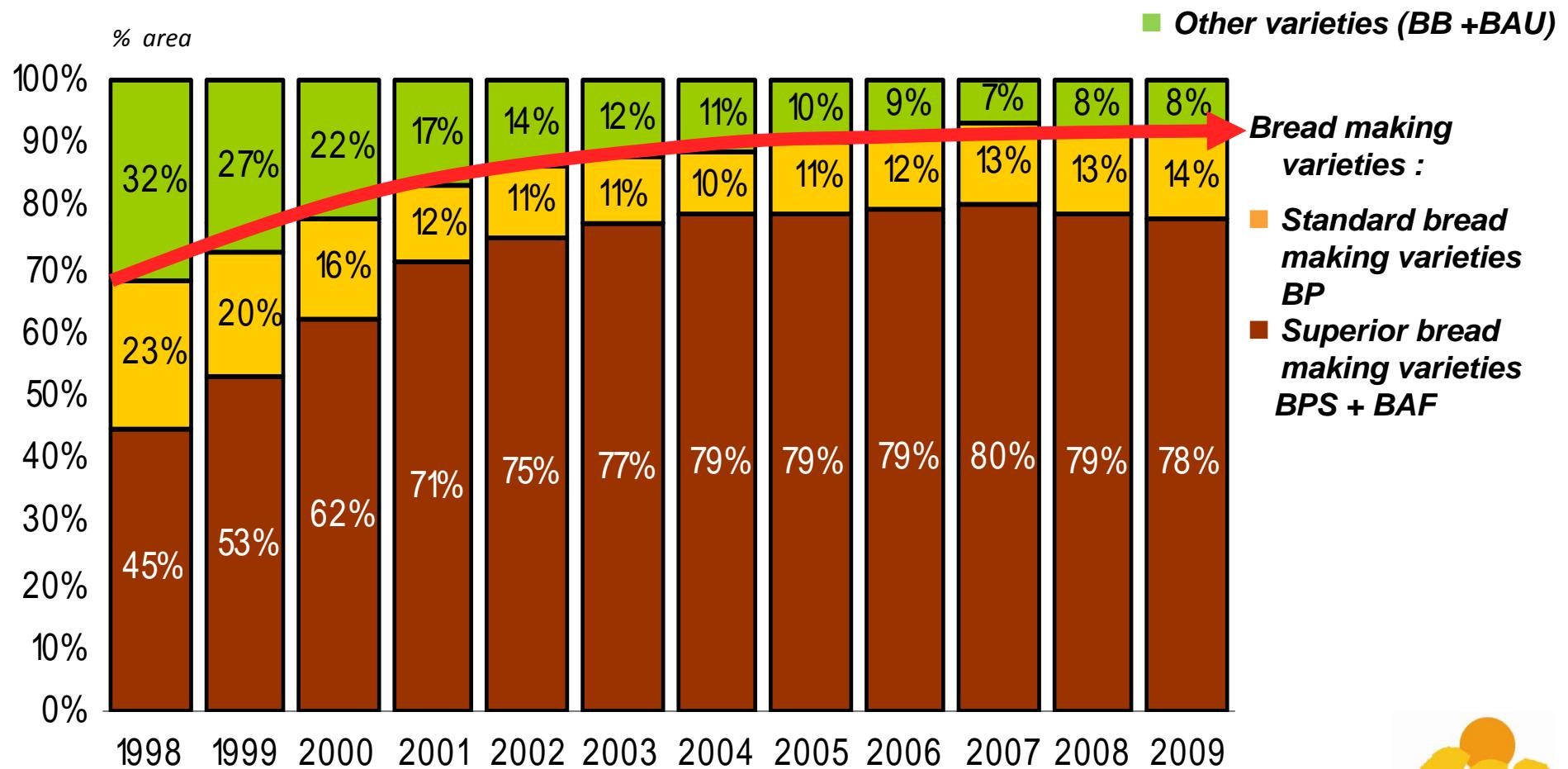
France accounts for 6% of world wheat* crop

(Average of 5 marketing years : from 2004/05 to 2008/09)



Source: IGC excluding durum

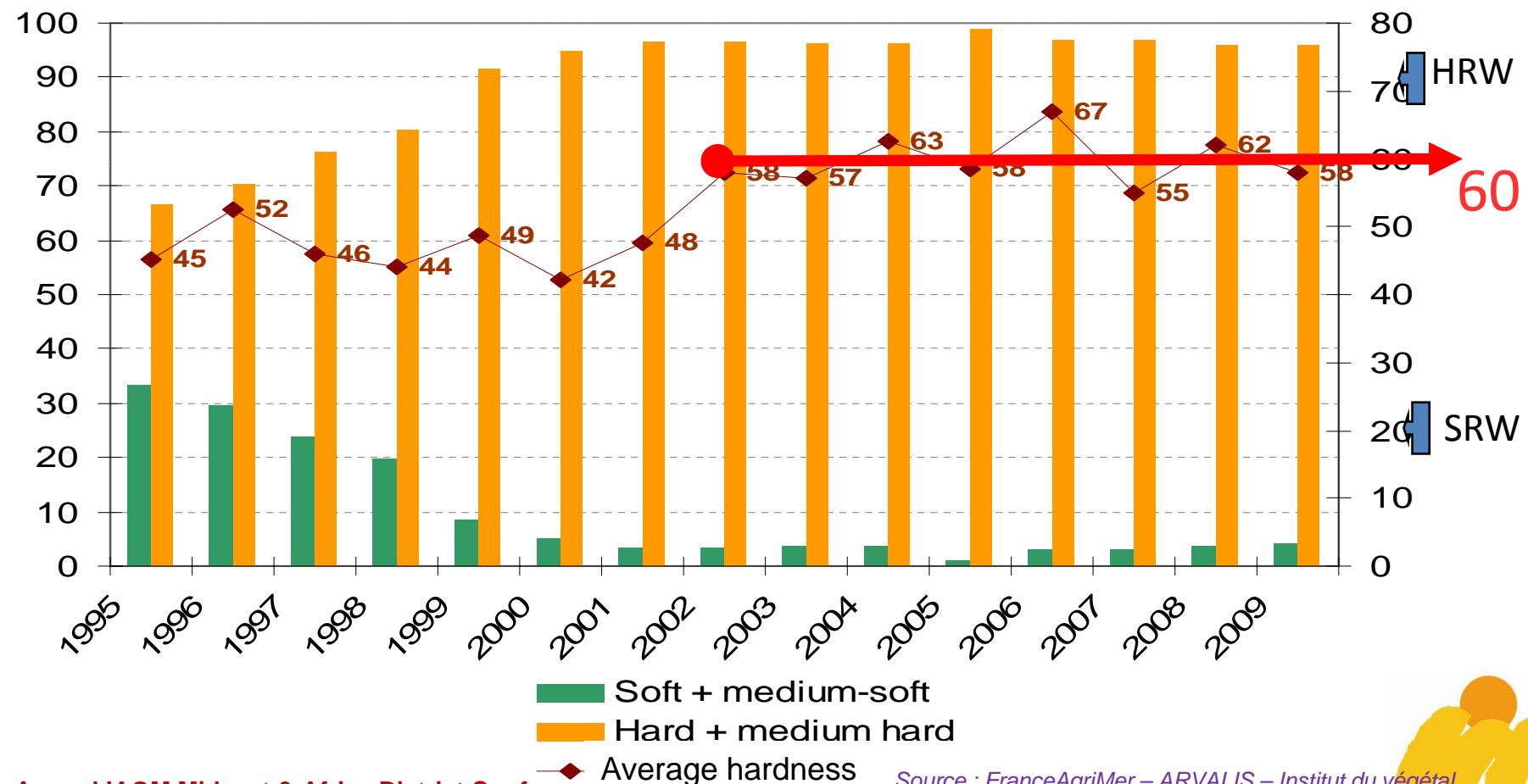
Most of wheat varieties suitable for bread making



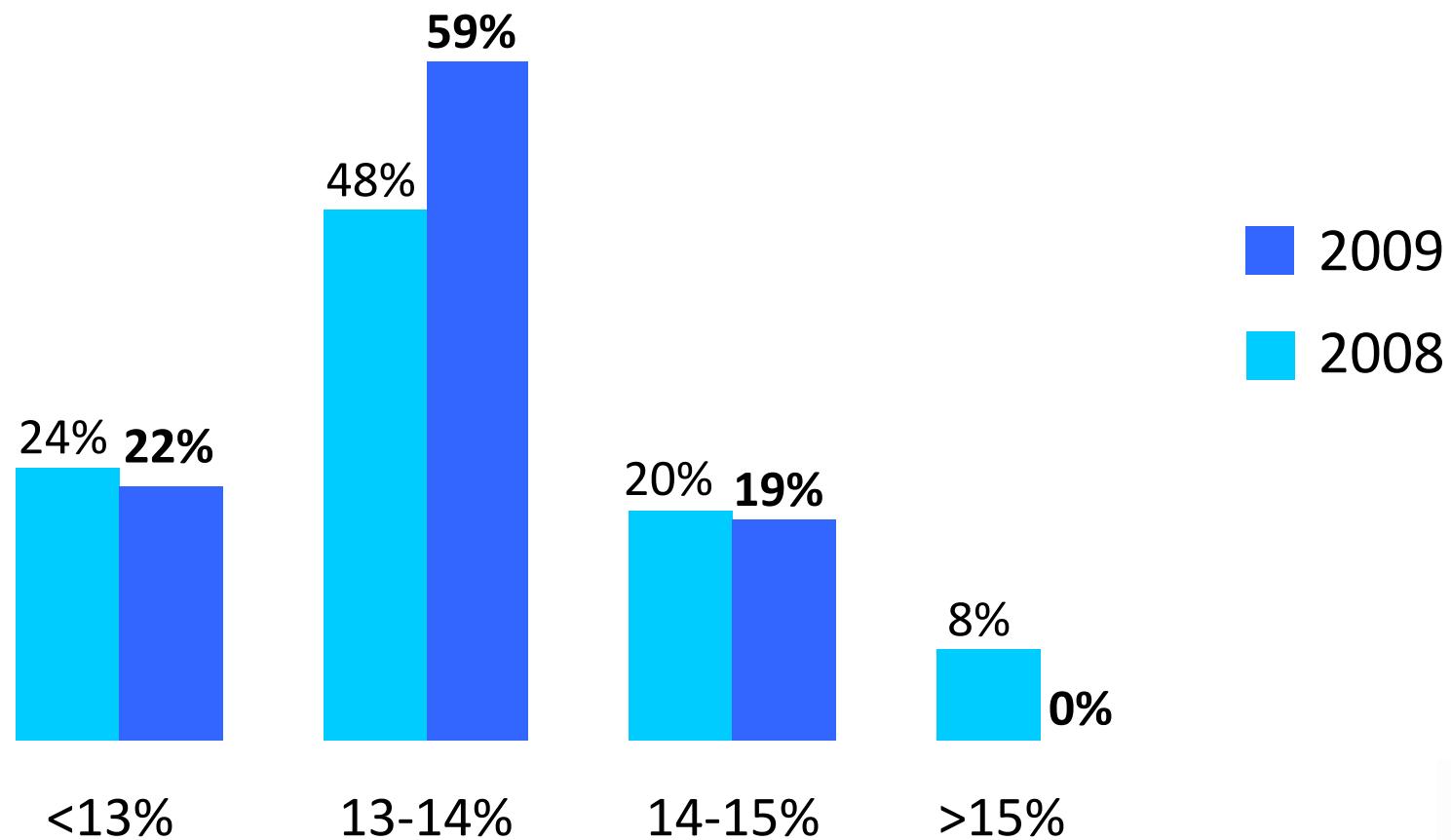
Most of wheat is medium hard

Proportion of french
wheat %

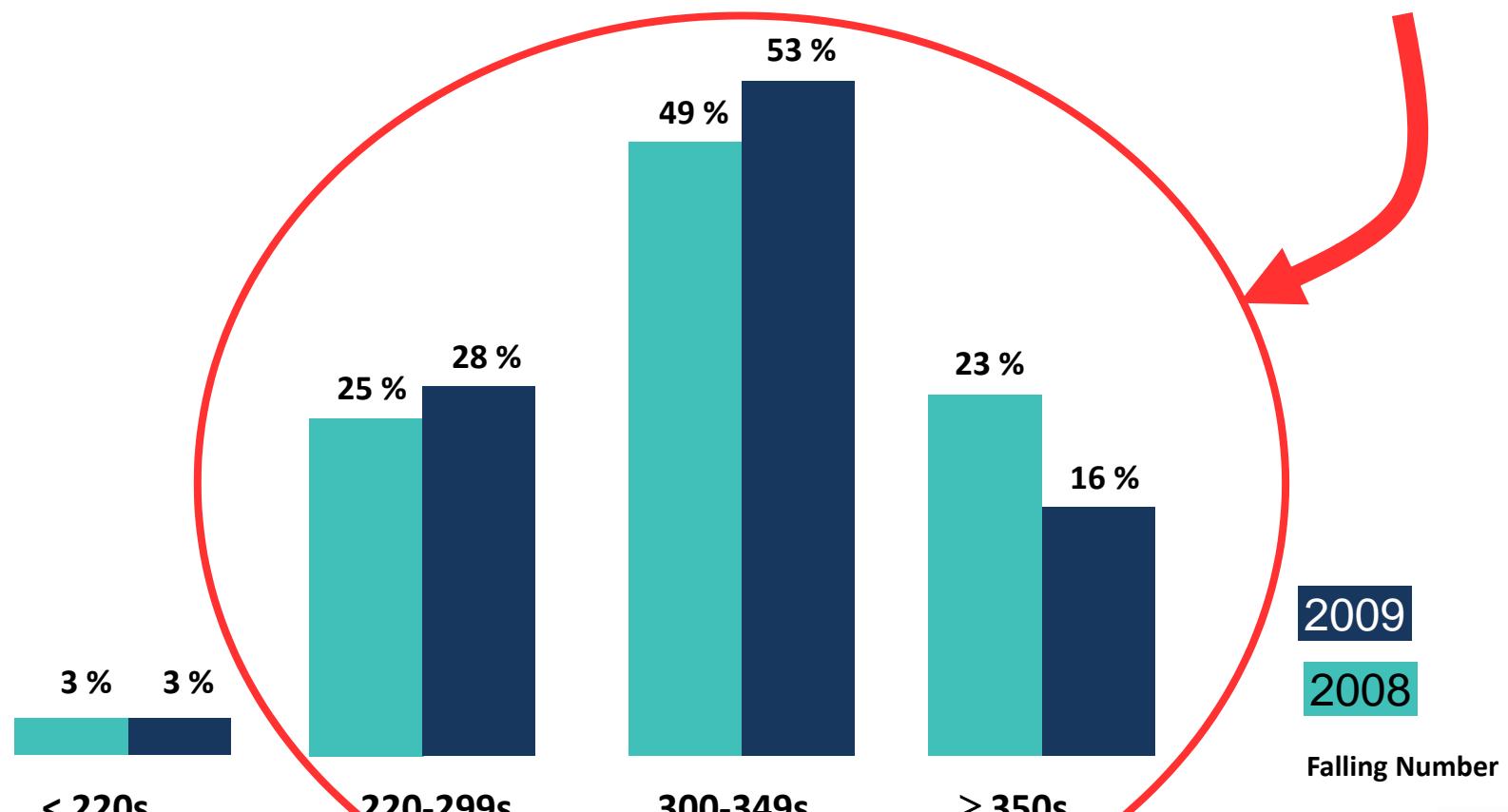
Hardness

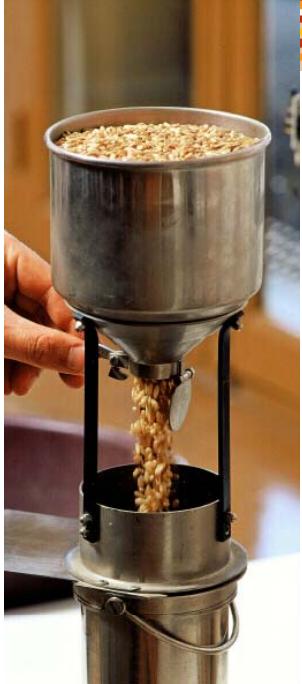


Water Content : 13.5 % on average

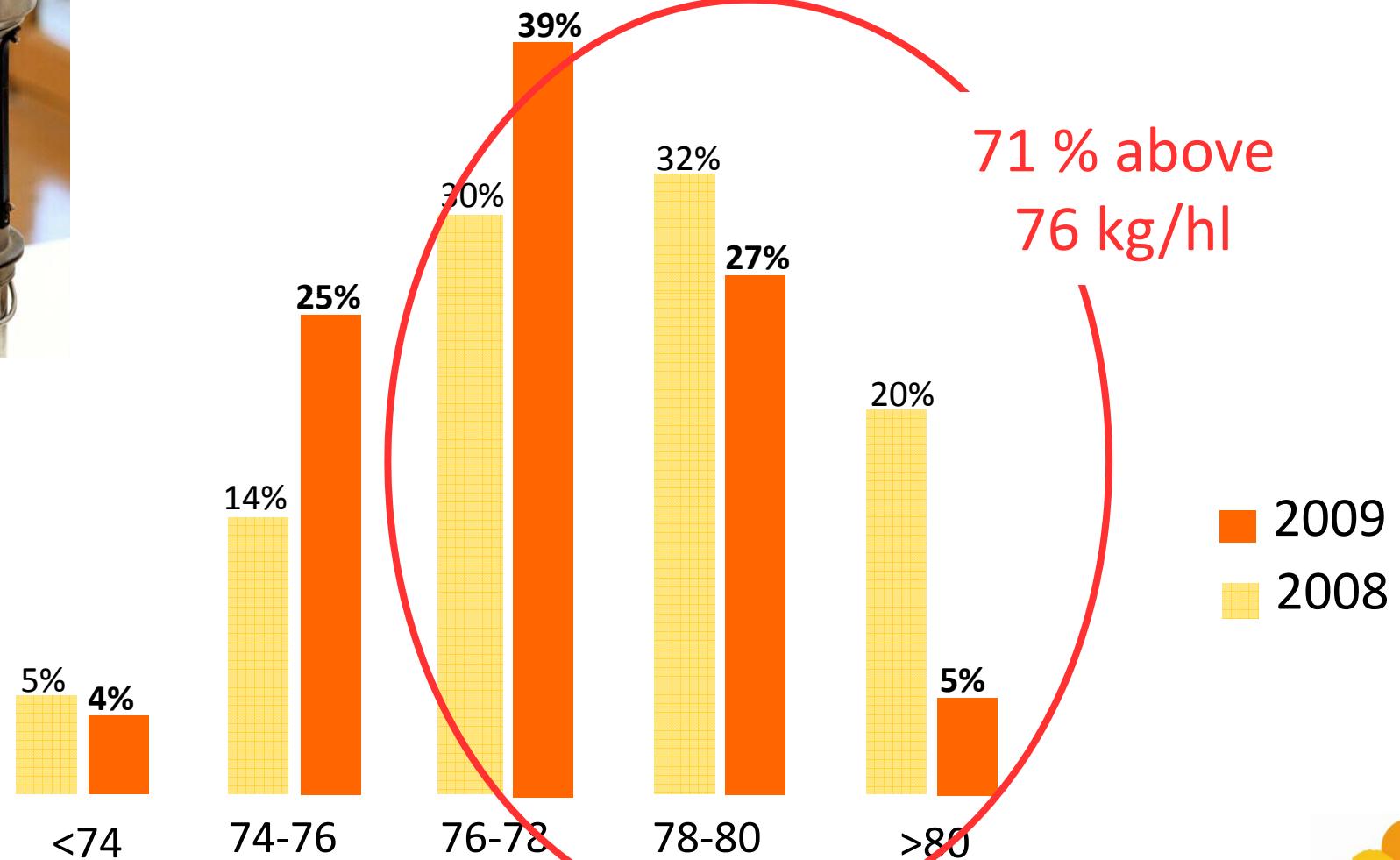


Falling number : 97% above 220s





Test weight : 77.1 kg/hl on average



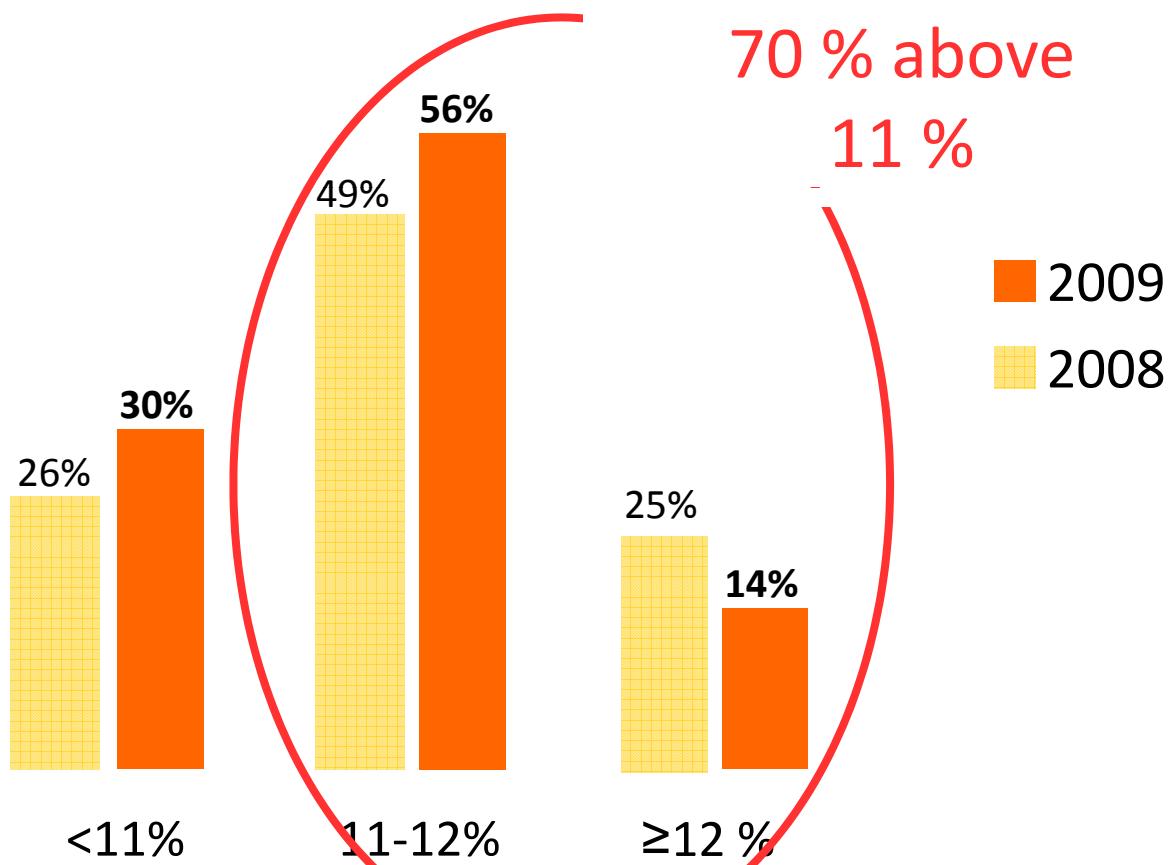
Source : FranceAgriMer – ARVALIS – Institut du végétal

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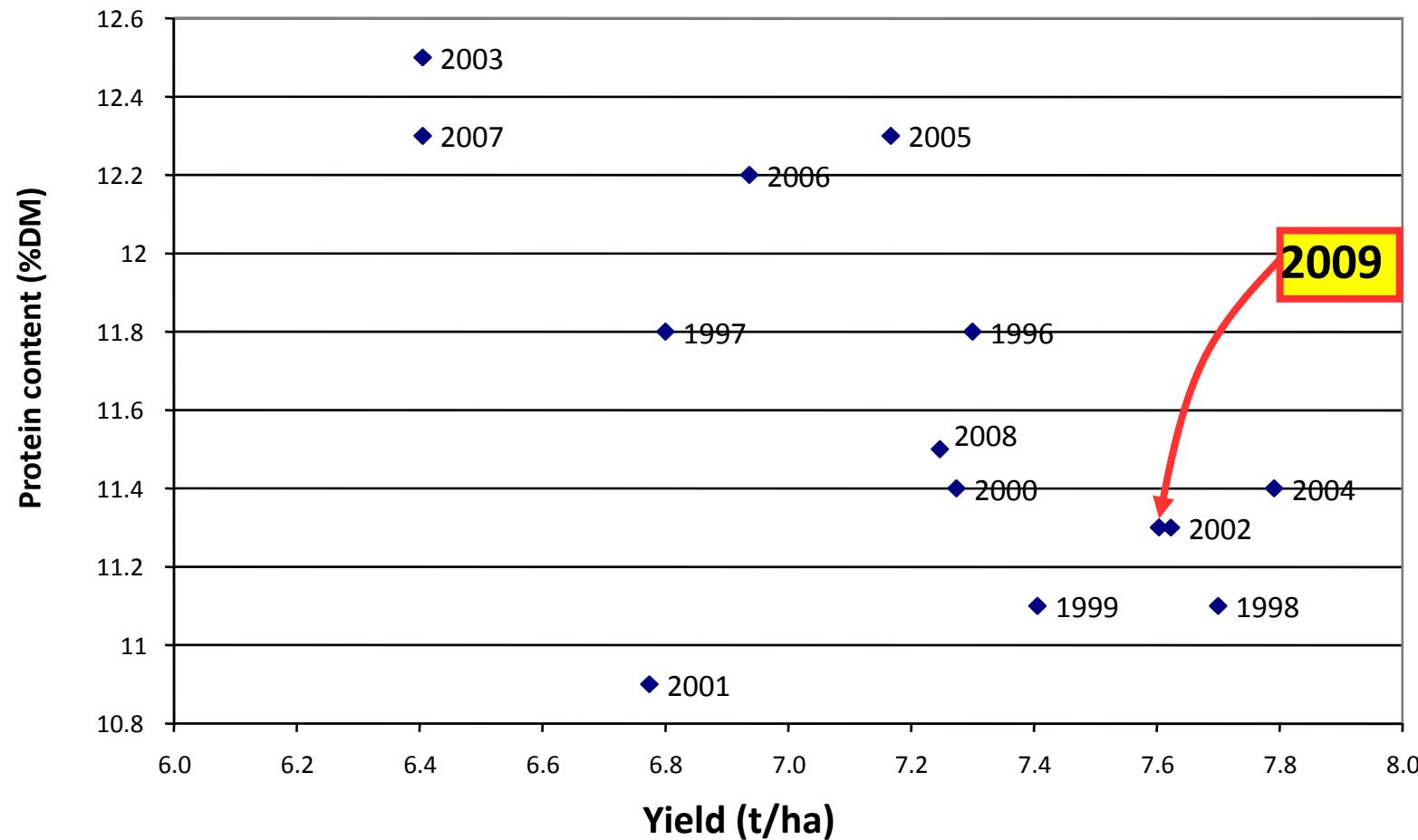
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Protein content : 11.3 % on average

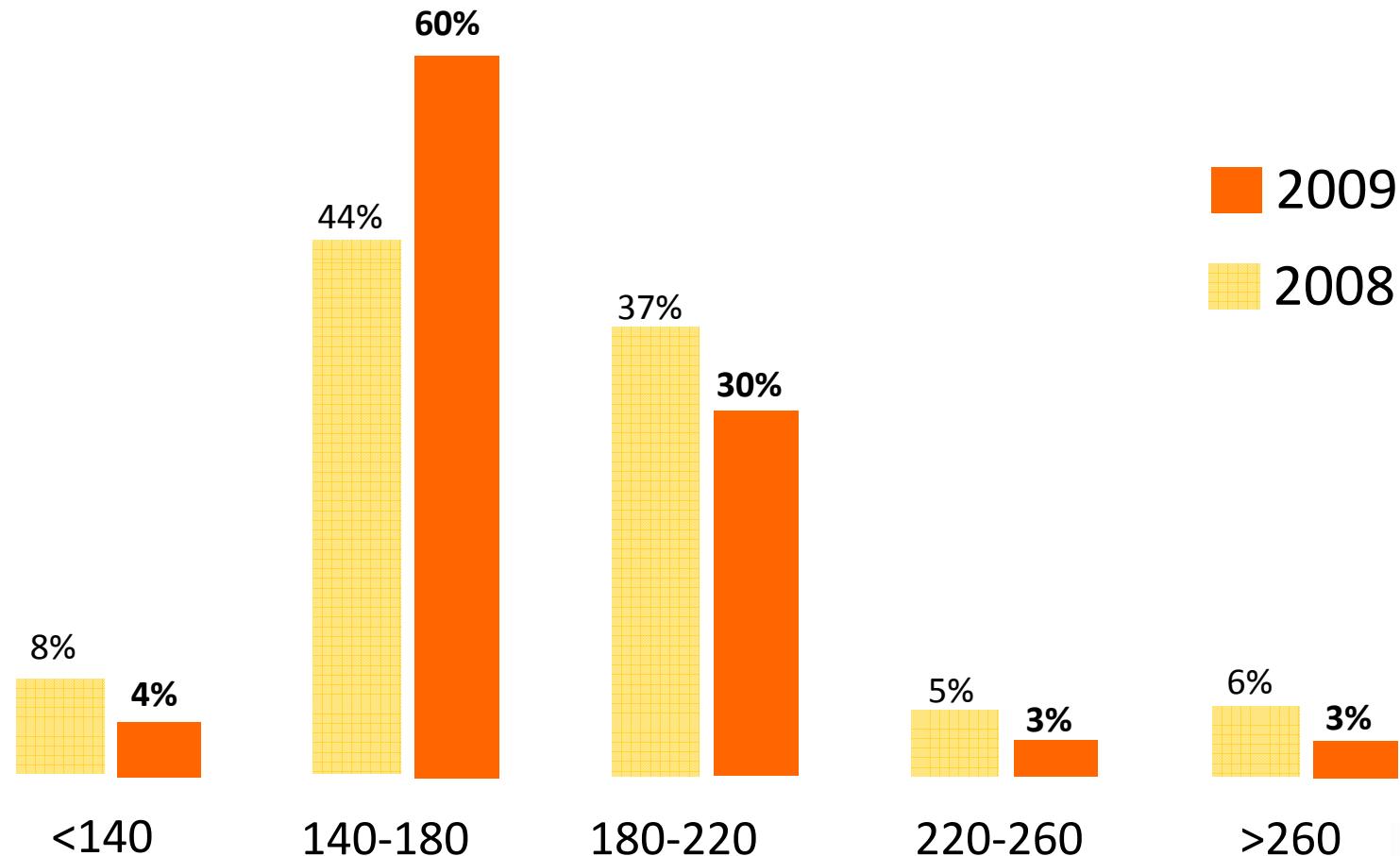


Corelation between yield and protein content





Baking strength W 179 on average

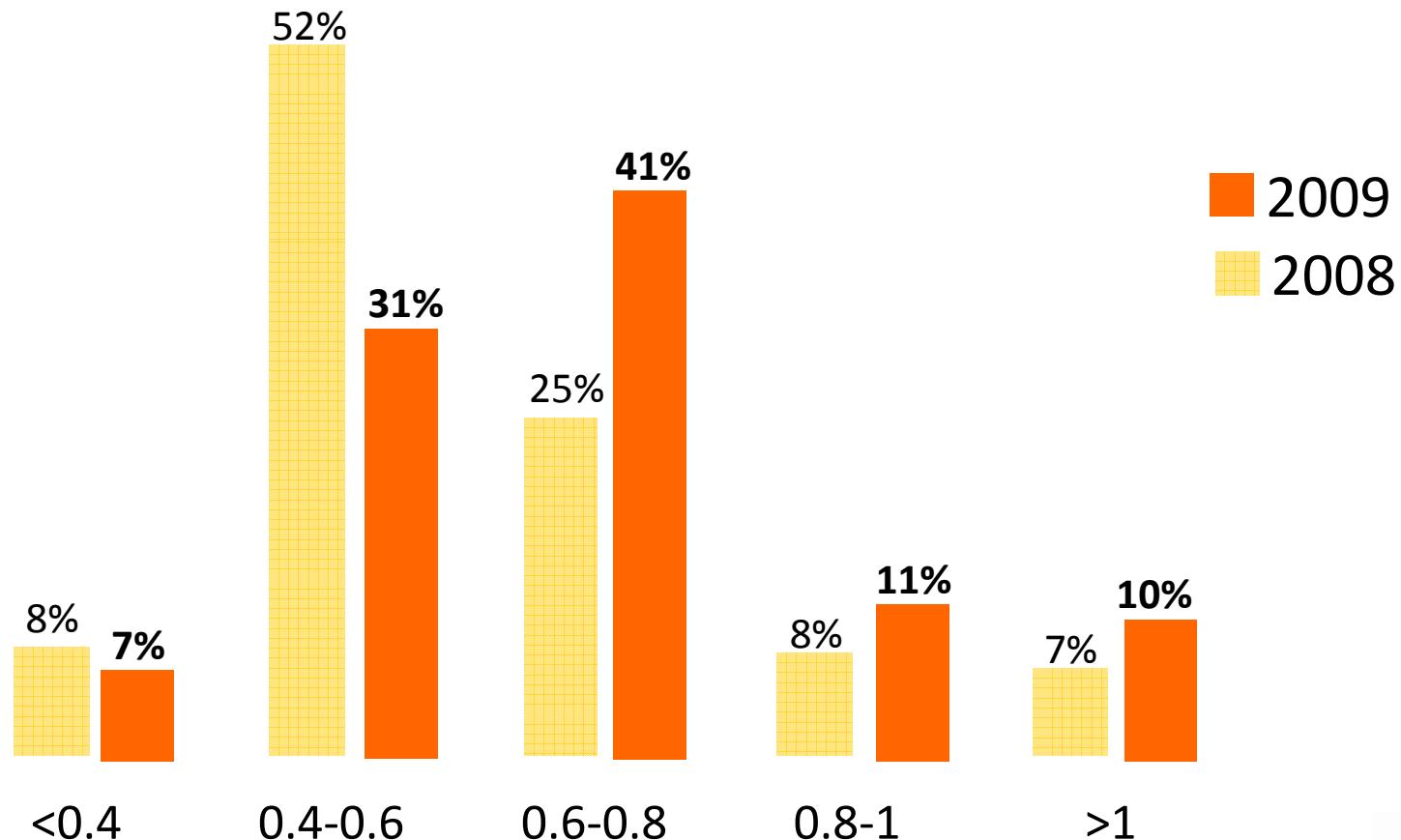


Source : FranceAgriMer – ARVALIS – Institut du végétal



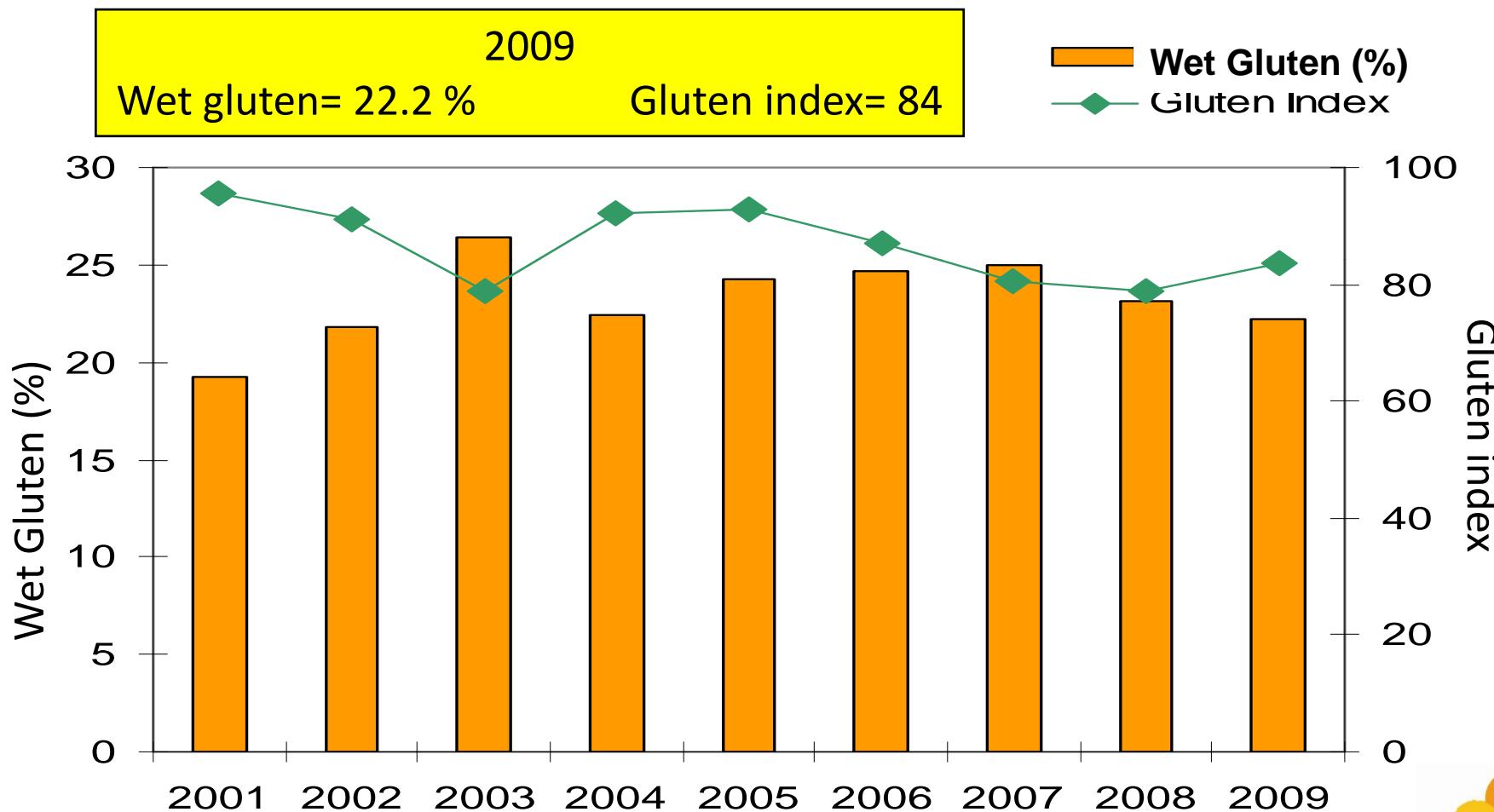
Configuration ration P/L

0.67 on average



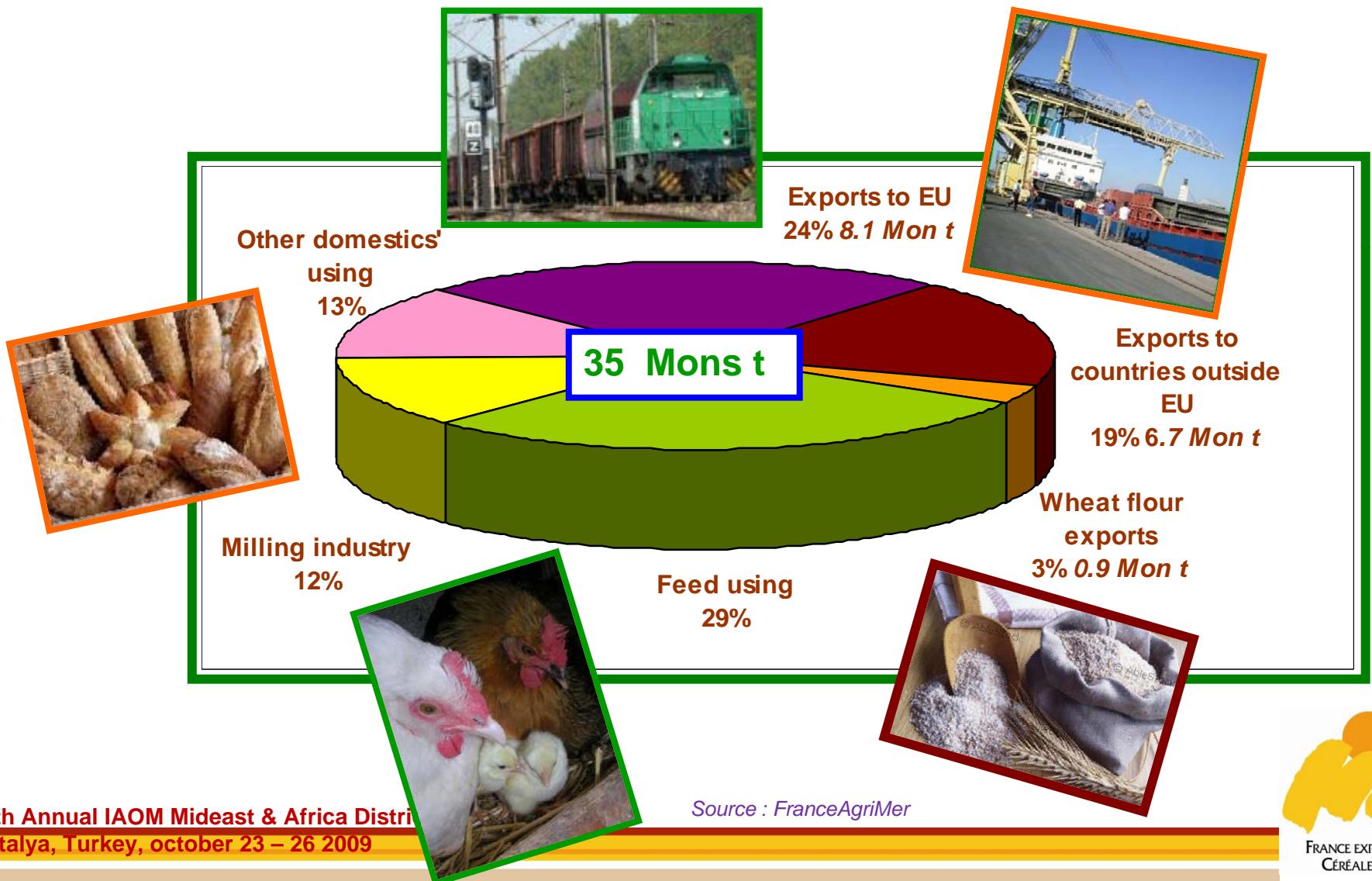
Source : FranceAgriMer – ARVALIS – Institut du végétal

Wet gluten and gluten index

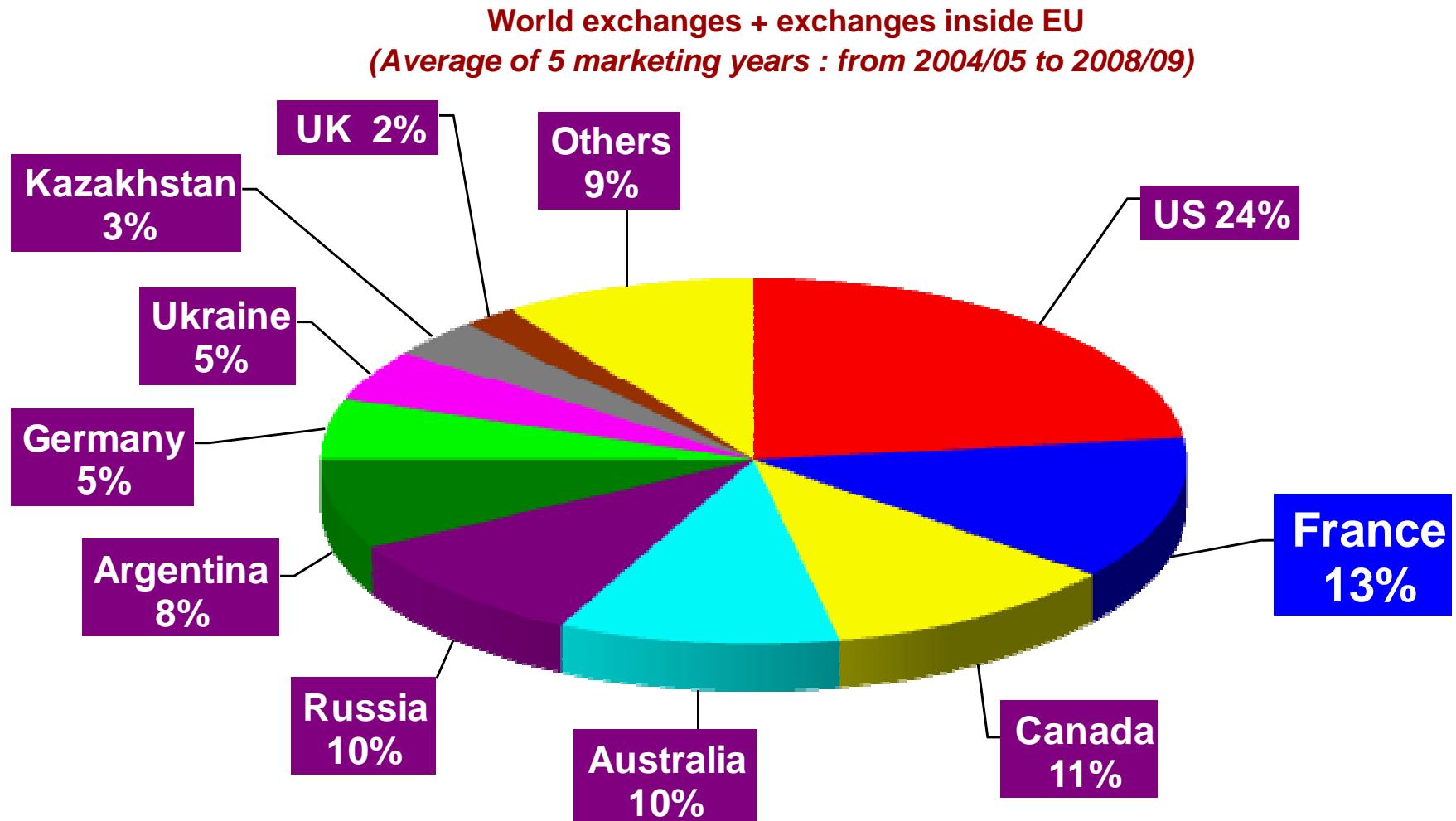


French wheat uses

(Average of 5 marketing years : from 2004/05 to 2008/09)



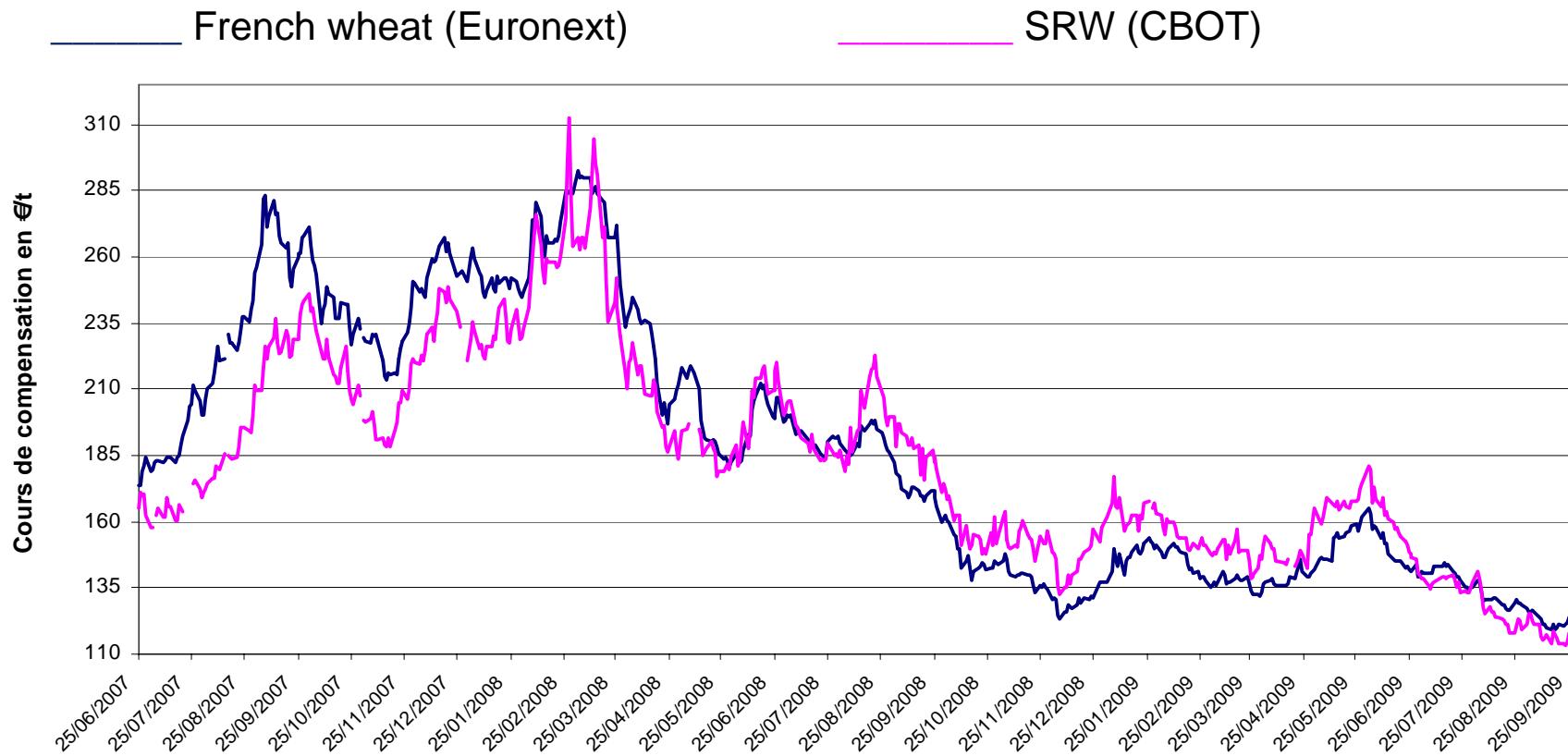
France: the 2nd largest world exporter of wheat



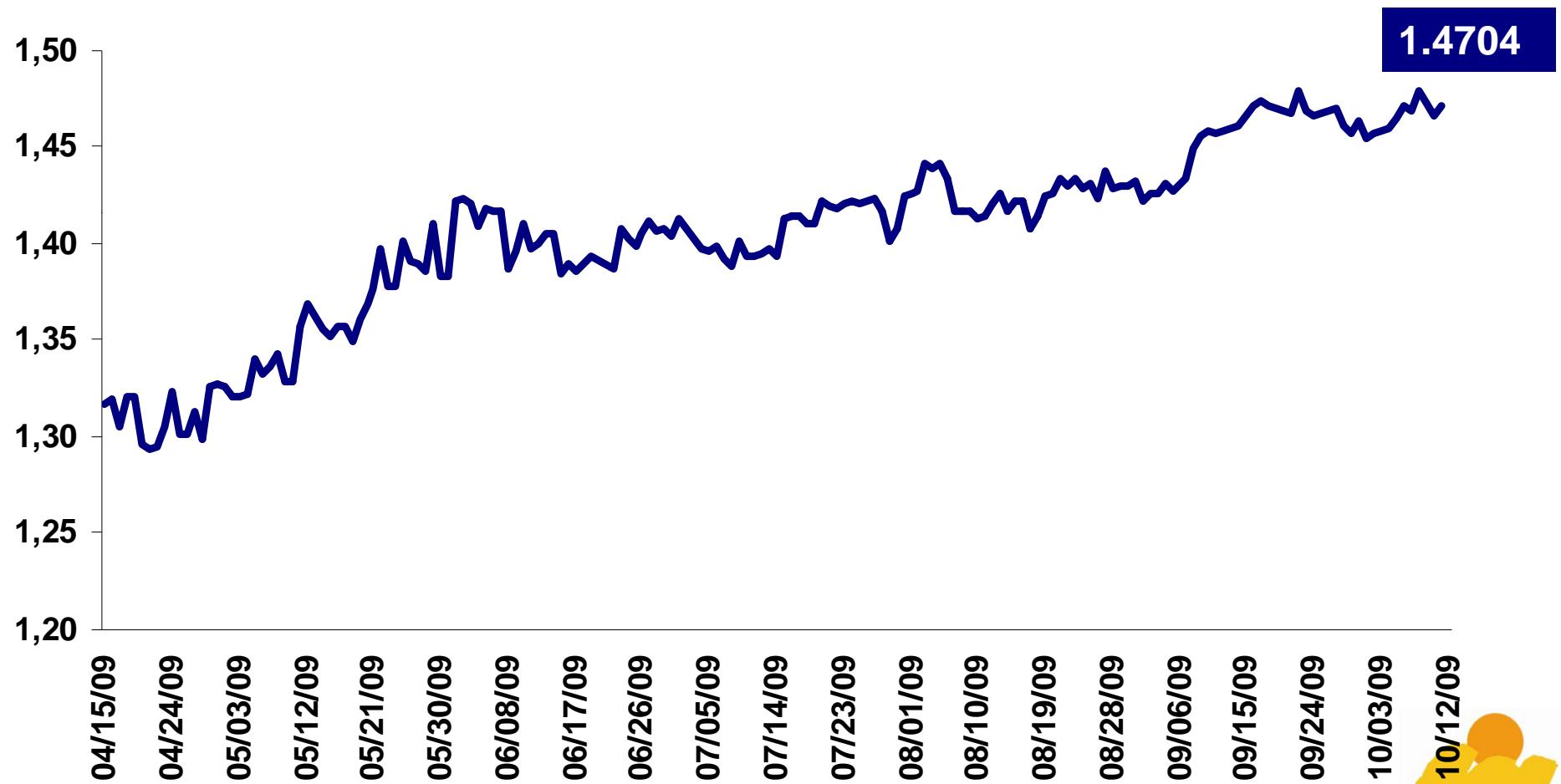
Source : IGC, Tallage Stratégie Grain

French Wheat prices (€ per ton)

(Source : CBOT, Euronext)



USD to 1 euro: a long-term retreat of dollar accelerates

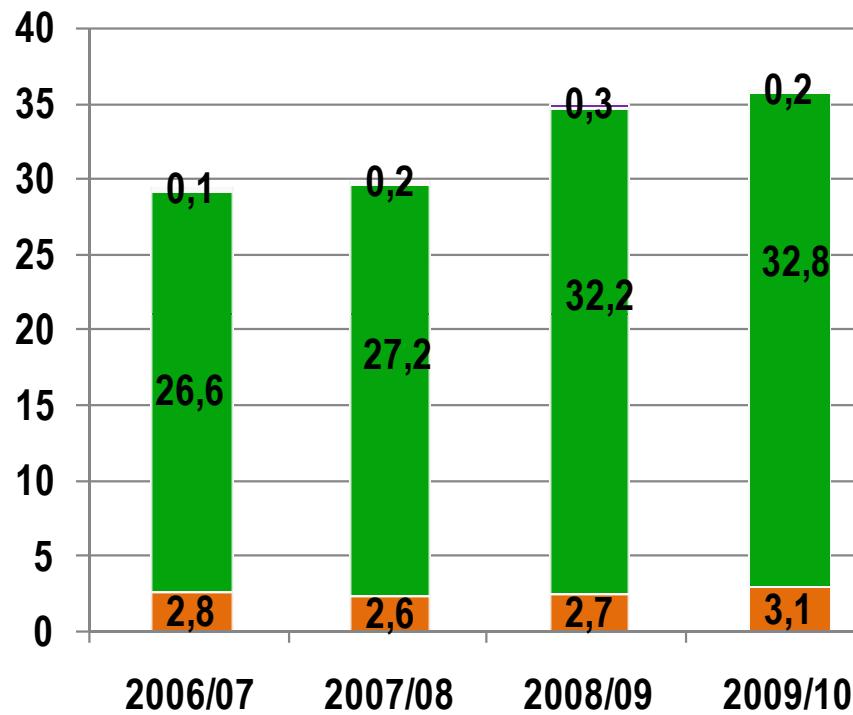


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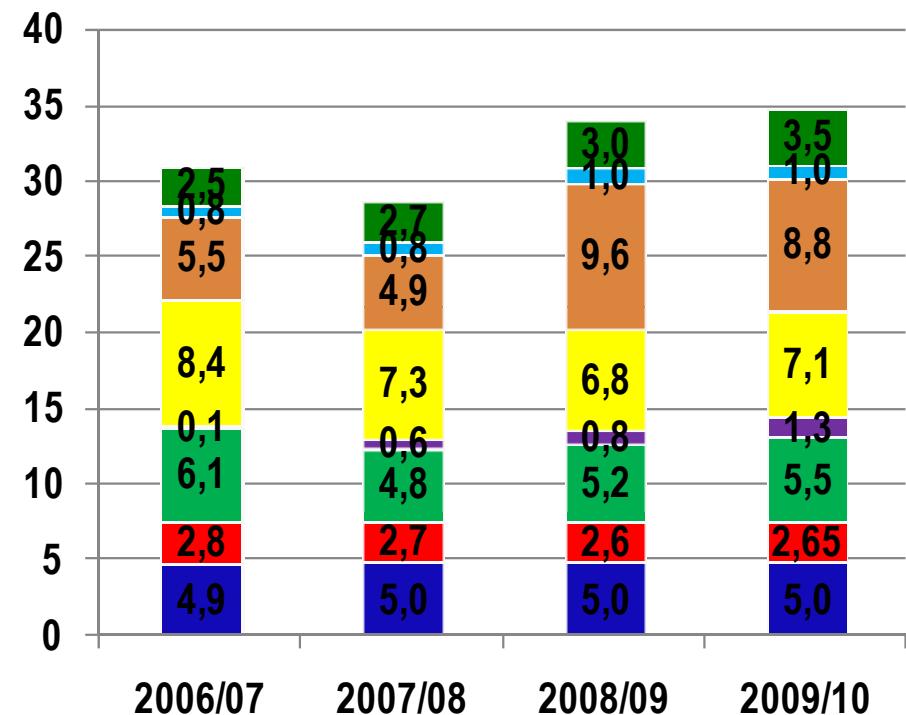
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Forecasted utilizations



■ Imports ■ Crop collected ■ Initial stock



■ Final Stock
■ Initial stock
■ Bio Fuels
■ Feed Industry
■ Grain Export outside UE
■ Grain Export inside UE
■ Flour Export

Source : FranceAgriMer oct 2009

Main customers for French wheat

Algeria

Morocco

West Africa



Mid East



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for world markets



les céréales françaises : pour les marchés du monde

Merci pour votre attention

Thanks for your attention

شكراً لانتباهكم

感谢关注

Os Merci vazam a atenção votre

Gracias por su atención

Спасибо за ваше внимание

Danke für Ihre Aufmerksamkeit