les céréales françaises : pour les marchés du monde

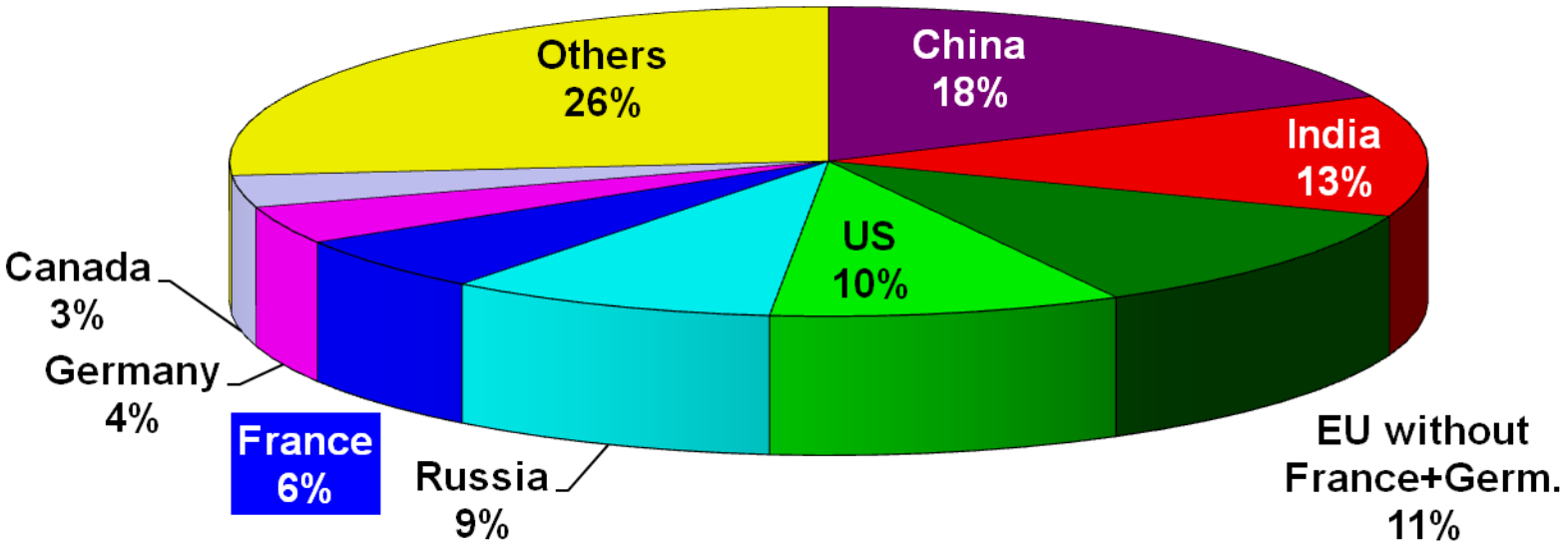
# 2011 French wheat offer

**22nd Annual IAOM MEA District Conference,**
**2-5 octobre 2011, Dead Sea, Jordan**

**François Gâtel**

# France accounts for 6% of world wheat* crop

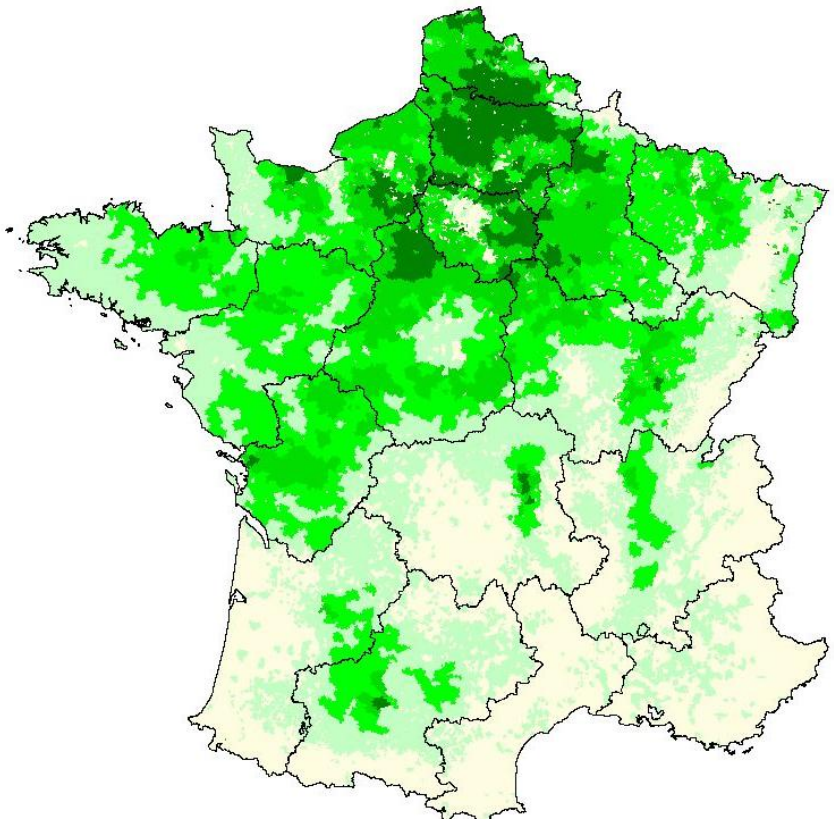
(Average of 3 marketing years : from 2008/09 to 2010/11)





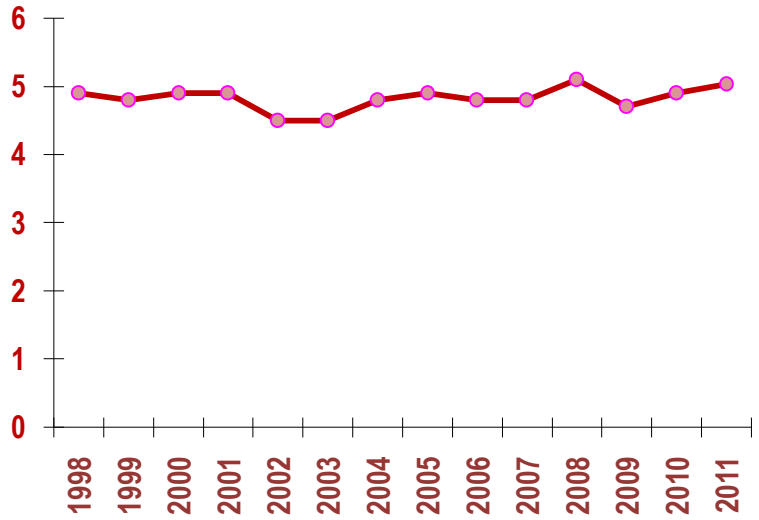

Source: IGC. * Excluding Durum

# A stable wheat area



**Wheat collection density (FranceAgriMer)**

**Evolution of wheat area (Mons ha)**



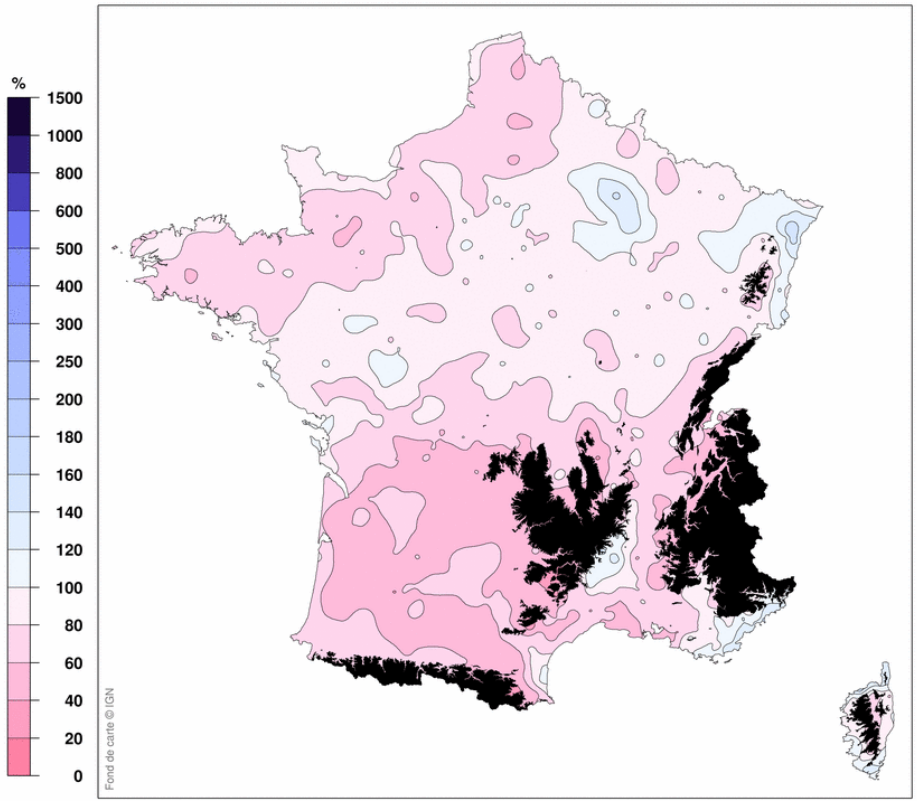

| Mons ha | Average 2006-2010 | 2011 |
|---|---|---|
| Overall French area | 55,0 | 55,0 |
| Wheat | 4,86 | 5,00 |
| Barley | 1,73 | 1,55 |
| Corn | 1,58 | 1,55 |
| Canola | 1,48 | 1,52 |



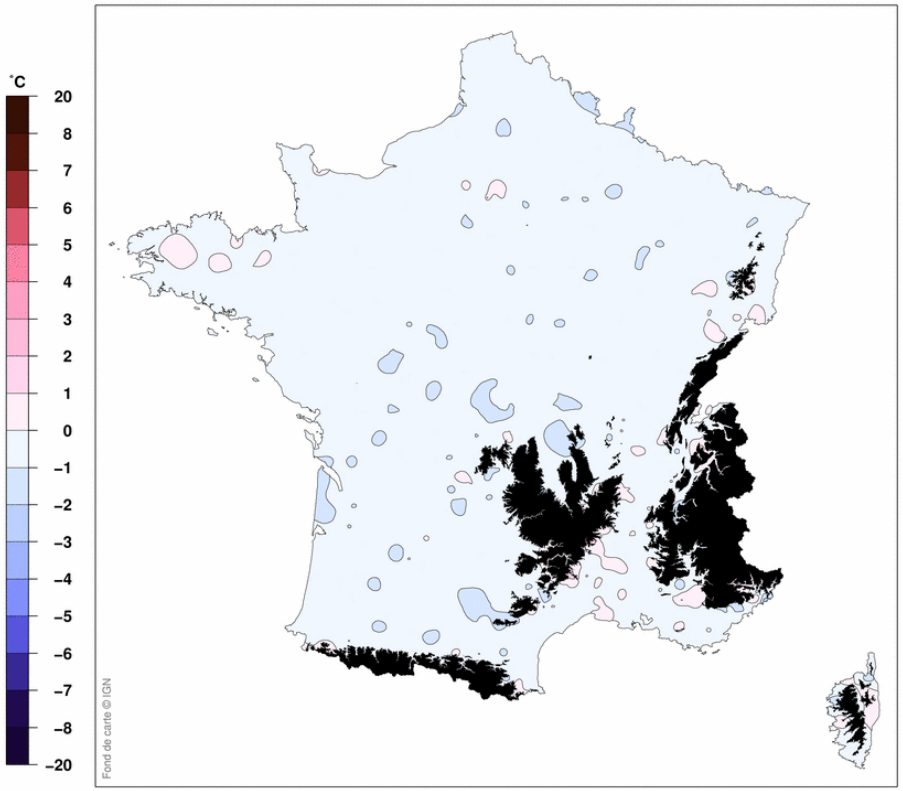
FRANCE EXPORT CÉRÉALES

# 2010-2011: Drought during winter

RAPPORT A LA NORMALE DES PRECIPITATIONS SAISONNIERES
HIVER(Decembre–Janvier–Fevrier) 2010/2011




ANOMALIE DE LA TEMPERATURE MOYENNE
HIVER(Decembre–Janvier–Fevrier) 2010/2011



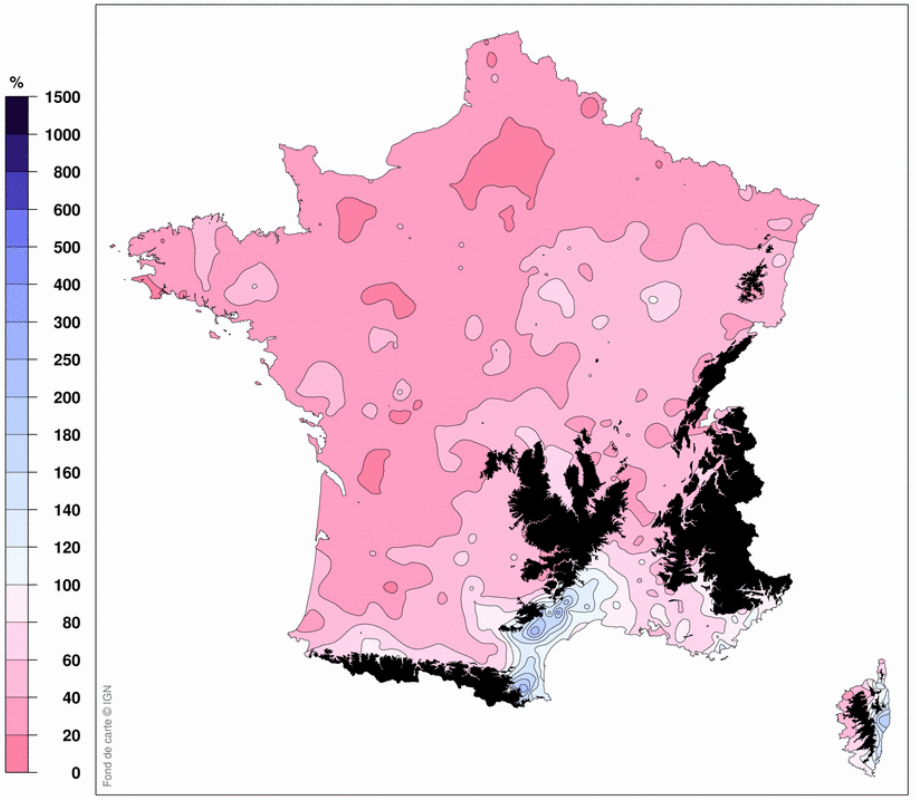



FRANCE EXPORT CÉRÉALES

# 2010-2011: Drought and high temperature during spring

RAPPORT A LA NORMALE DES PRECIPITATIONS SAISONNIERES
PRINTEMPS(Mars–Avril–Mai) 2011

METEO FRANCE
Toujours un temps d'avance




ANOMALIE DE LA TEMPERATURE MOYENNE
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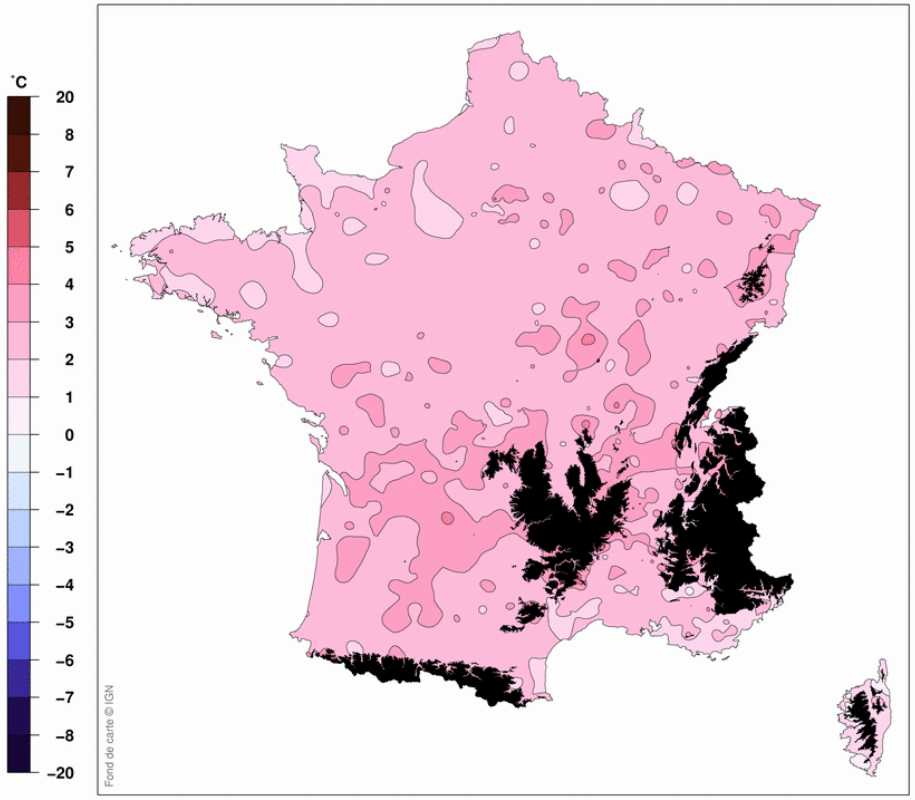
METEO FRANCE
Toujours un temps d'avance



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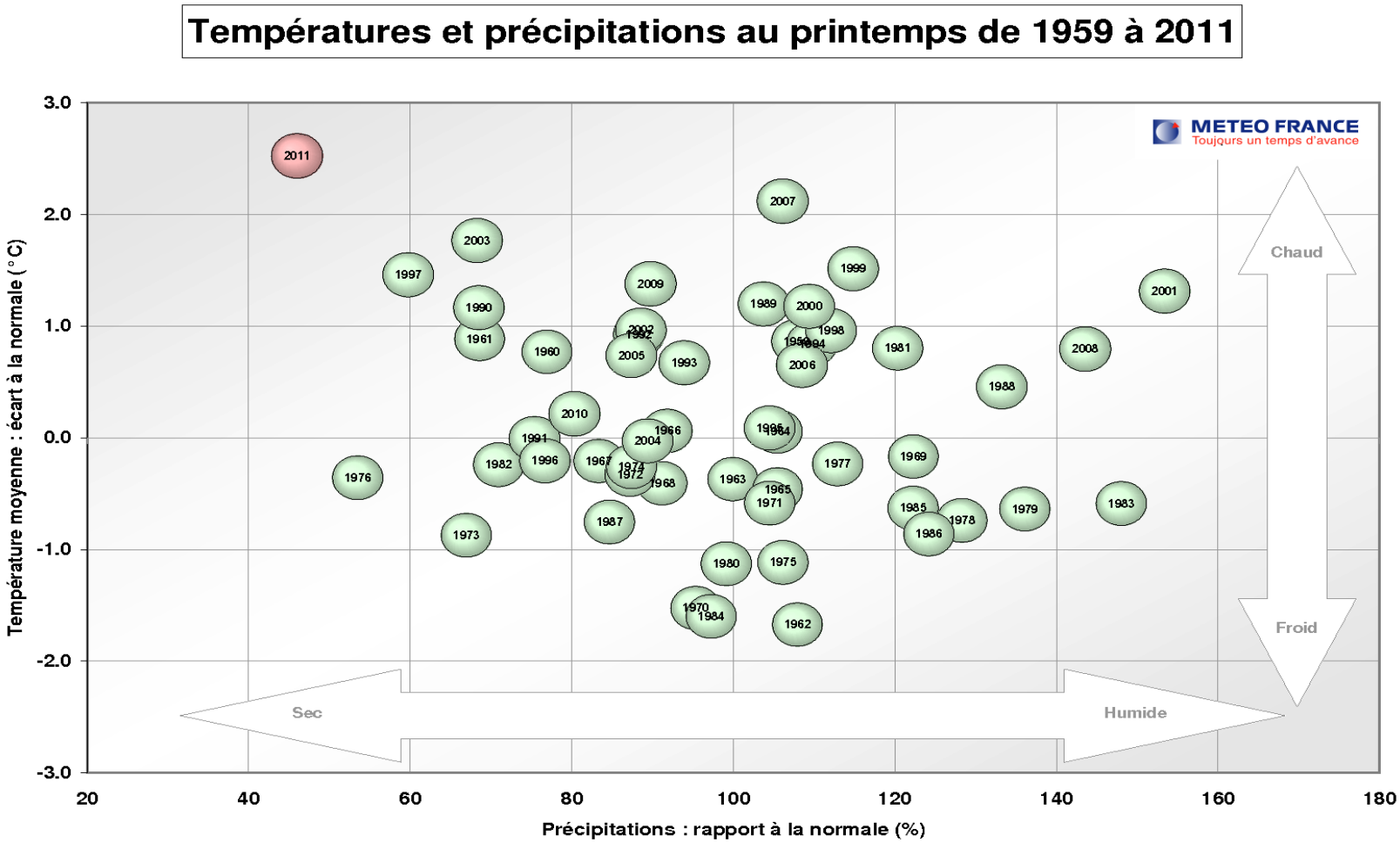
# 2011: dryest and warmest spring since 1959



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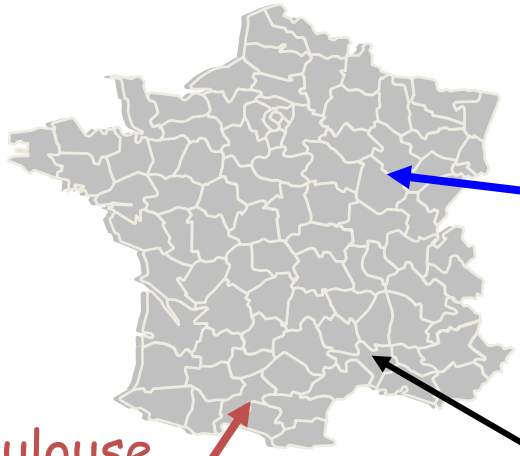
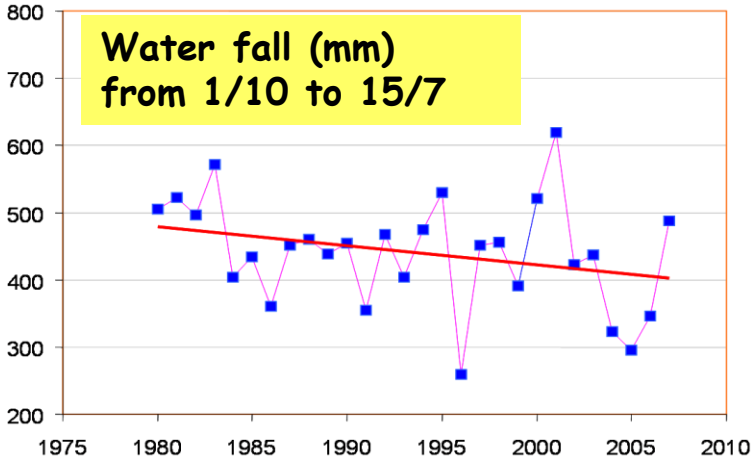
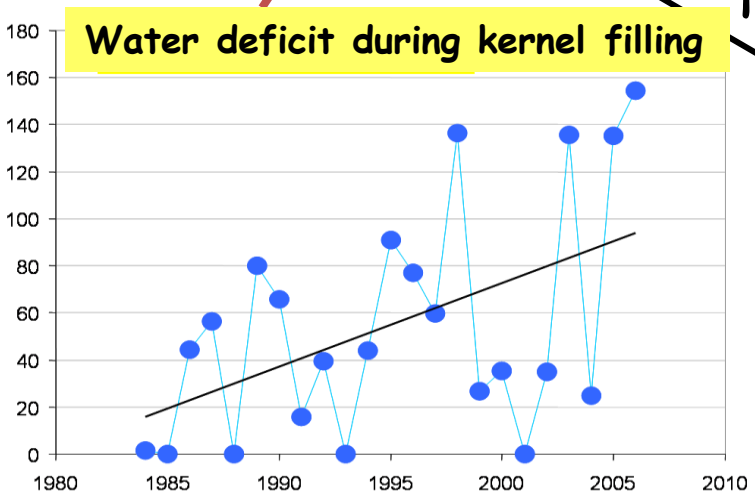
# More and more drought during spring



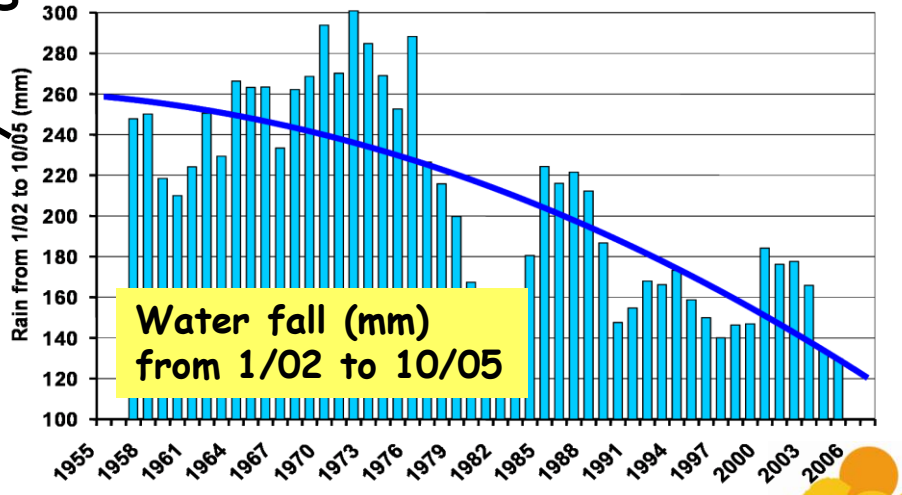
Chalôns




Toulouse




Nîmes






Source: INRA

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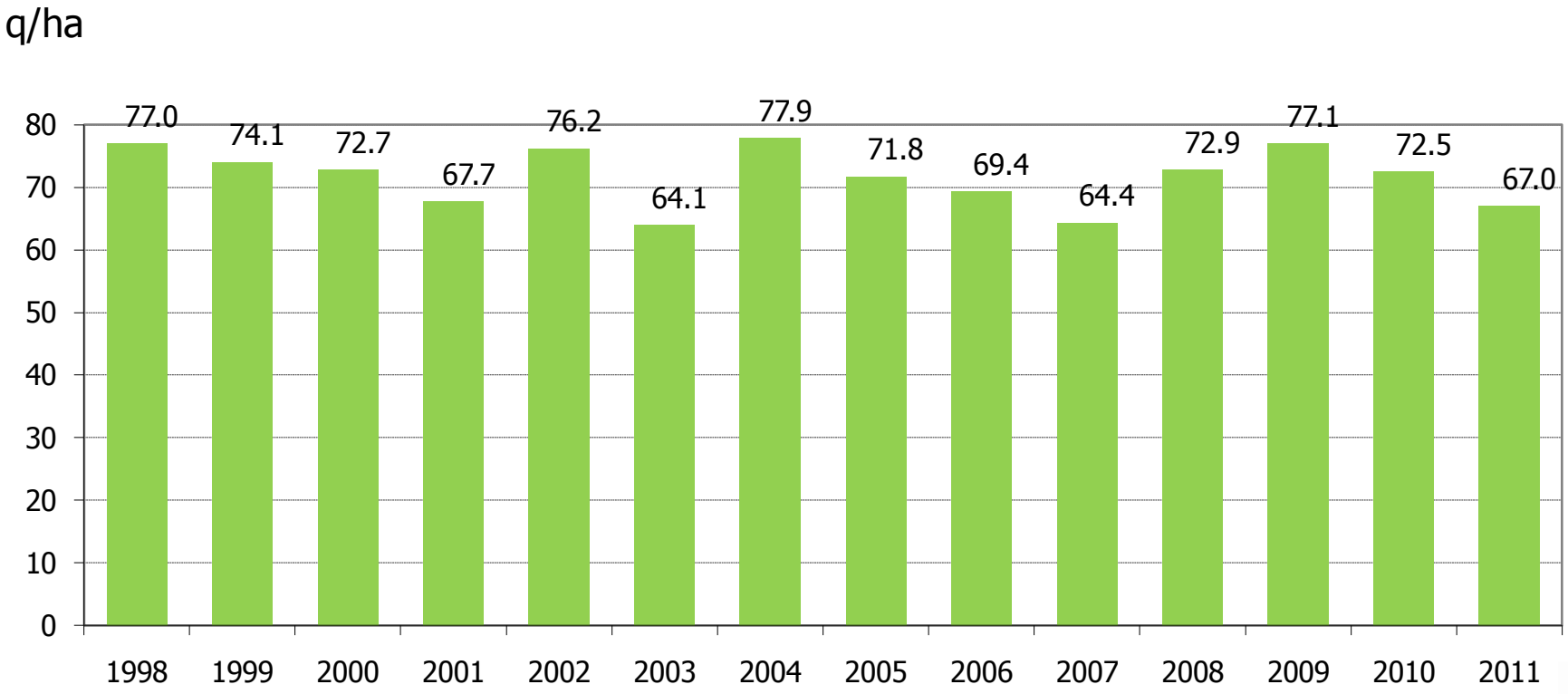
# Evolution of wheat yields

**2011: 67 q/ha**
**-6 q/ha (-7.5 %) vs 2010**
**-6% vs 5 years average**



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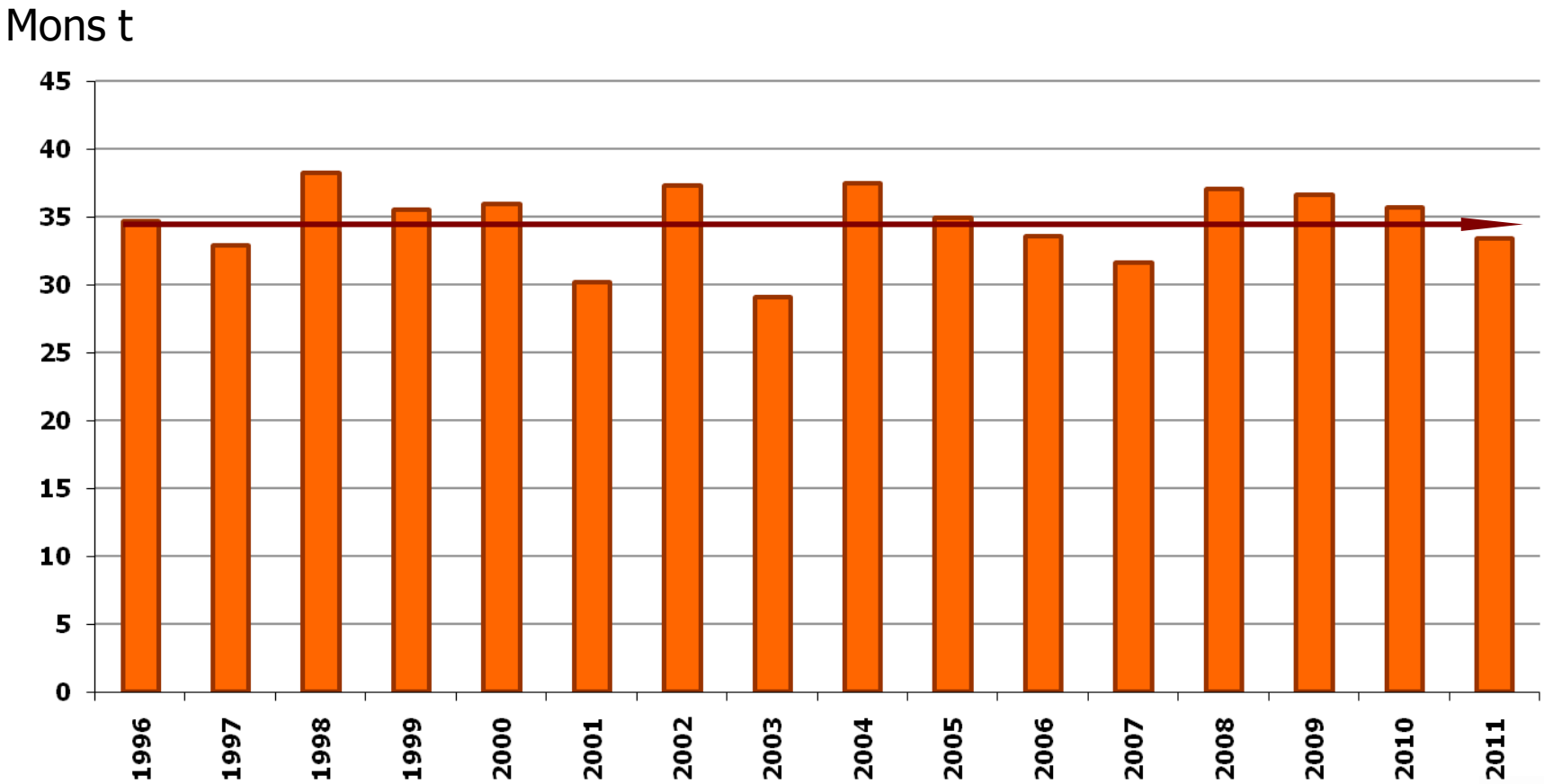
# A high and regular level of production

**2011: 33.4 Mons t**
**-6 % vs 2010**
**-3.5% vs 5 years average**



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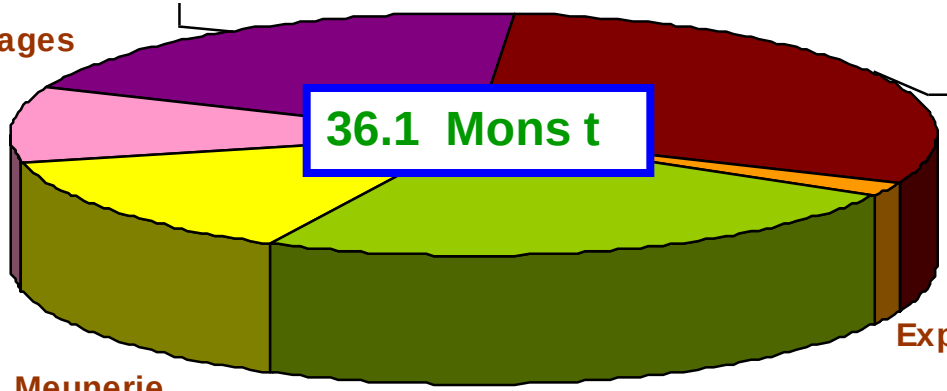
# Half of French wheat production is exported

**(Average of 3 marketing years 2008/09 to 2010/11)**

Exports UE 20%
7,1 Mot

Autres usages
10%




Exports PT
30%
10,8 *MMT*

Meunerie
14%

Alimentation
animale
24%

Exports farine
2%
*0.8 MMT*

Source : FranceAgriMer.
* Excluding Durum

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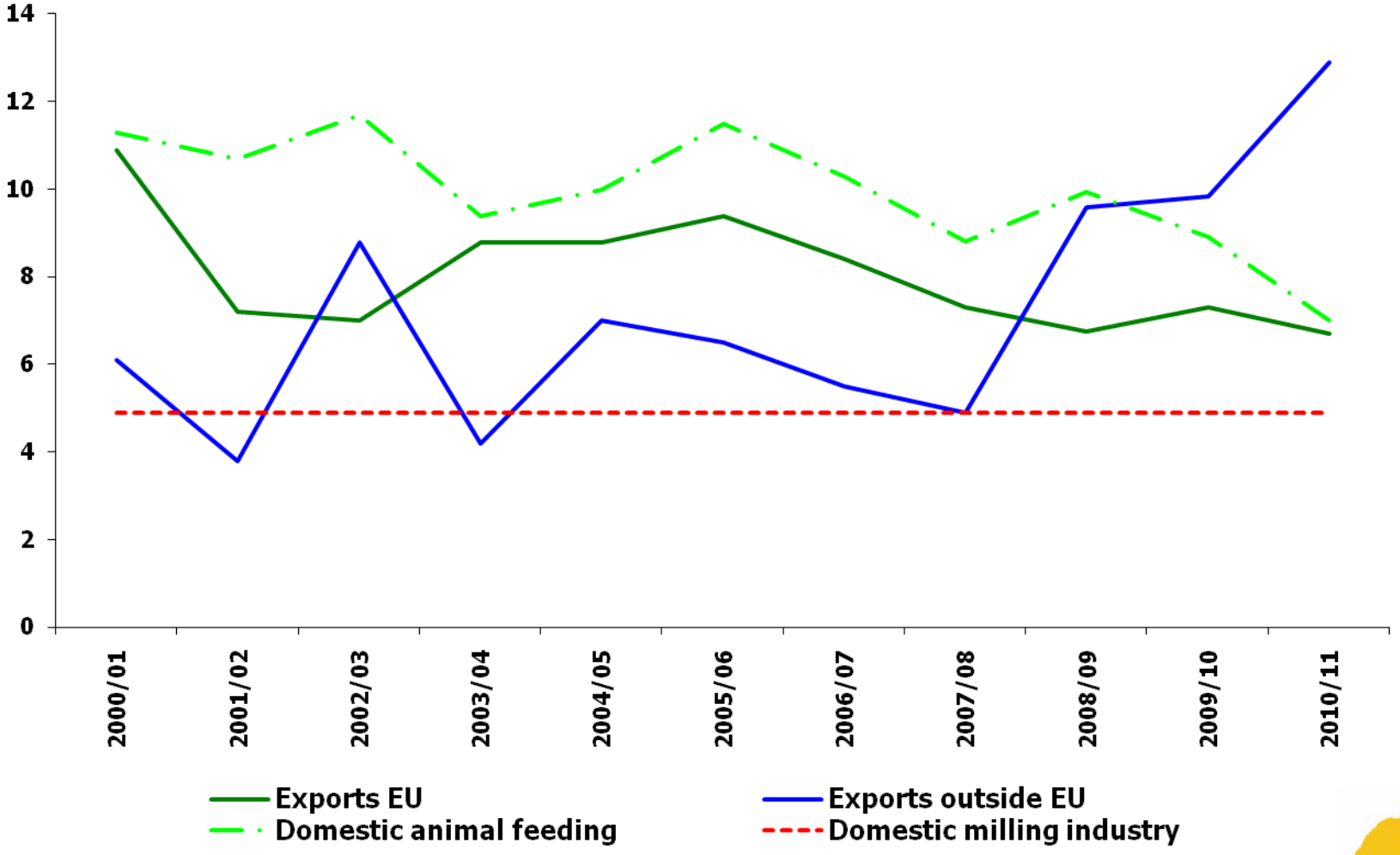
# More and more wheat exported outside EU

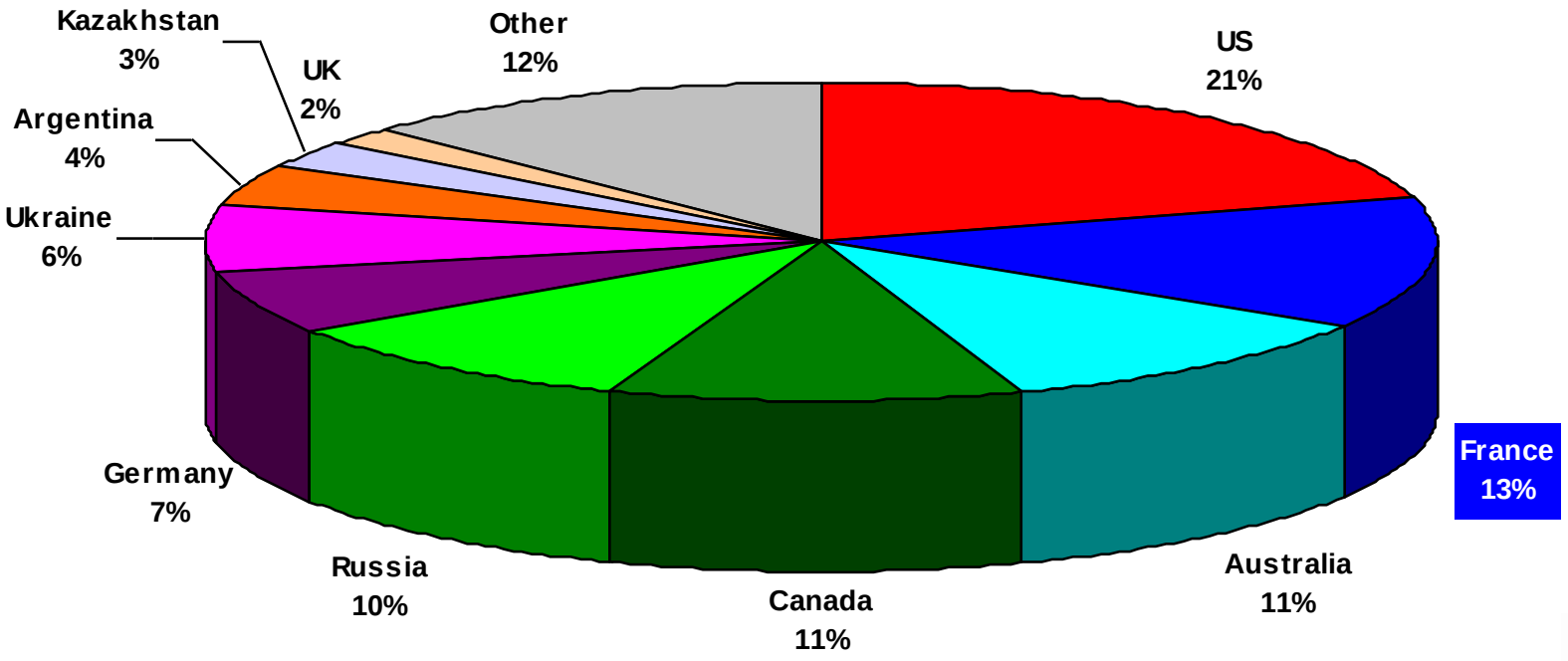





FRANCE EXPORT CÉRÉALES

# France: the 2nd largest world exporter of wheat * (World + Intra EU exchanges)

## (Average of 3 marketing years 2008/09 to 2010/11)

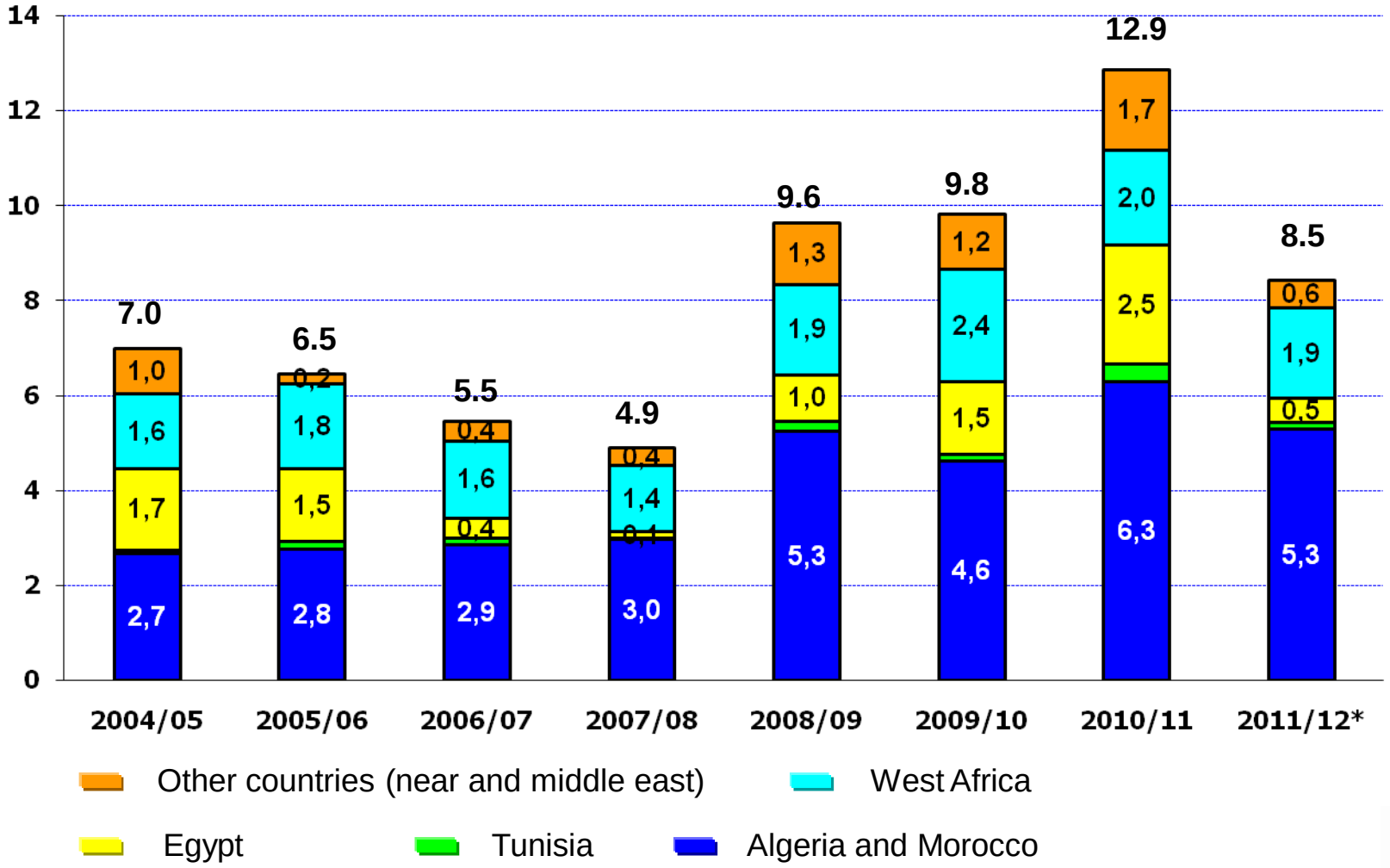



Source: CIC, Stratégie Grains.
* Excluding Durum



FRANCE EXPORT CÉRÉALES

# Main customers for French wheat outside EU






Source : Stratégie Grains. * 080911

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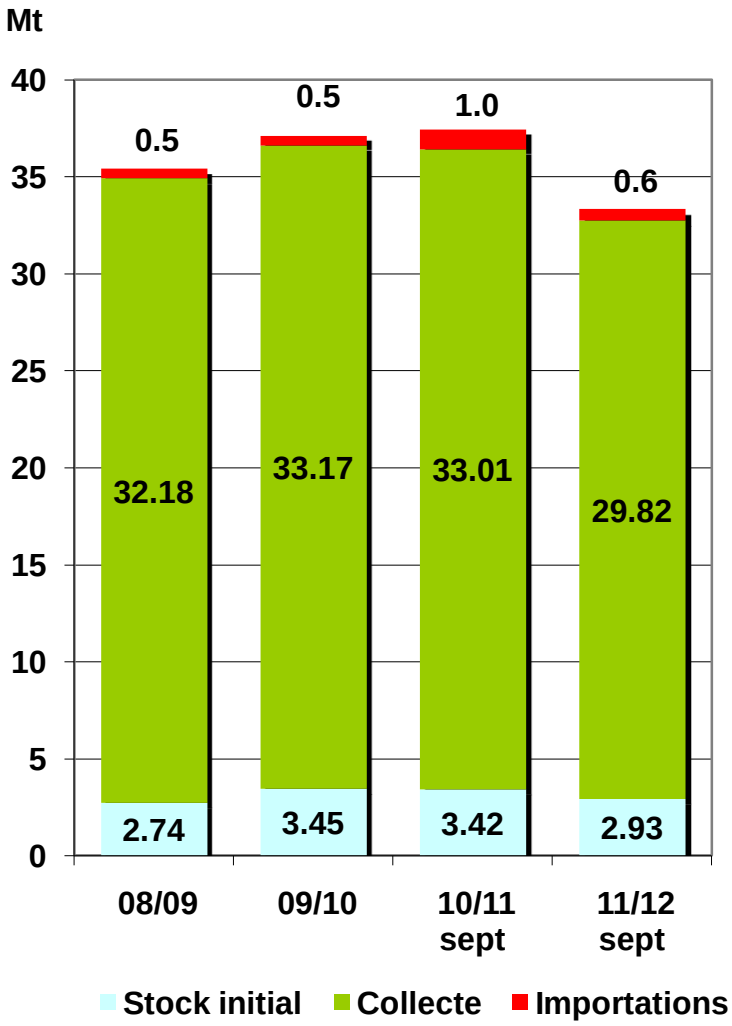
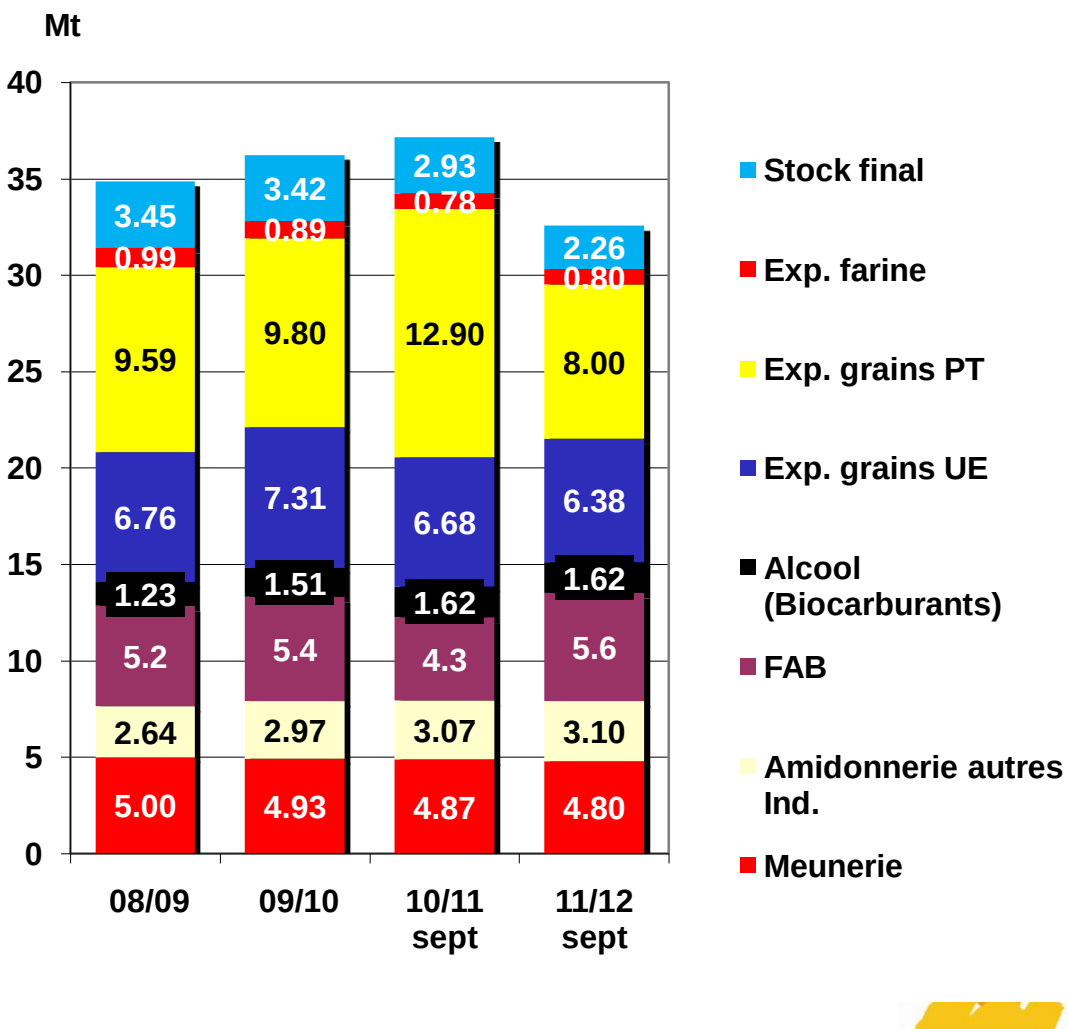
# Utilizations of French wheat



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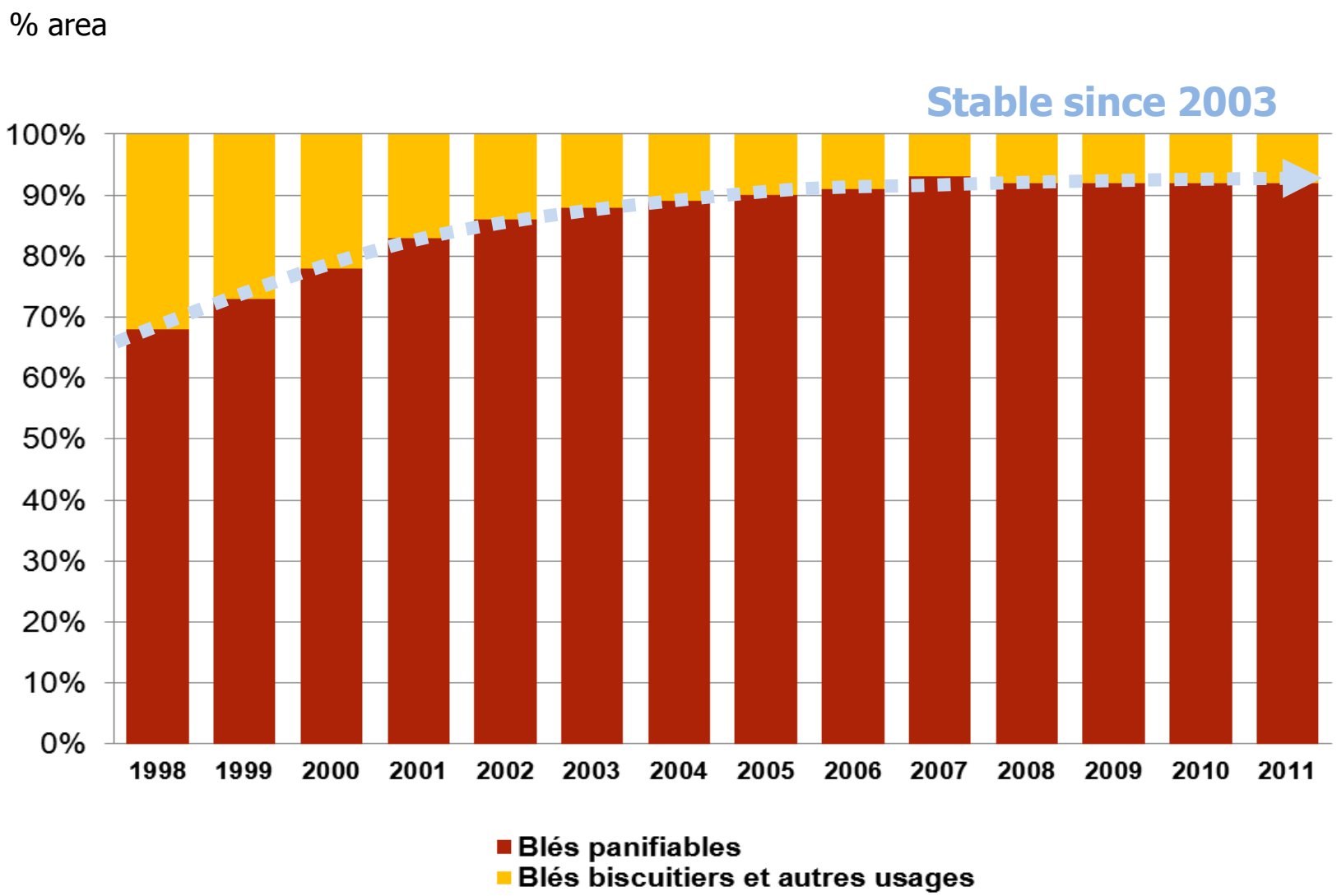
# Most of wheat varieties suitable for bread making



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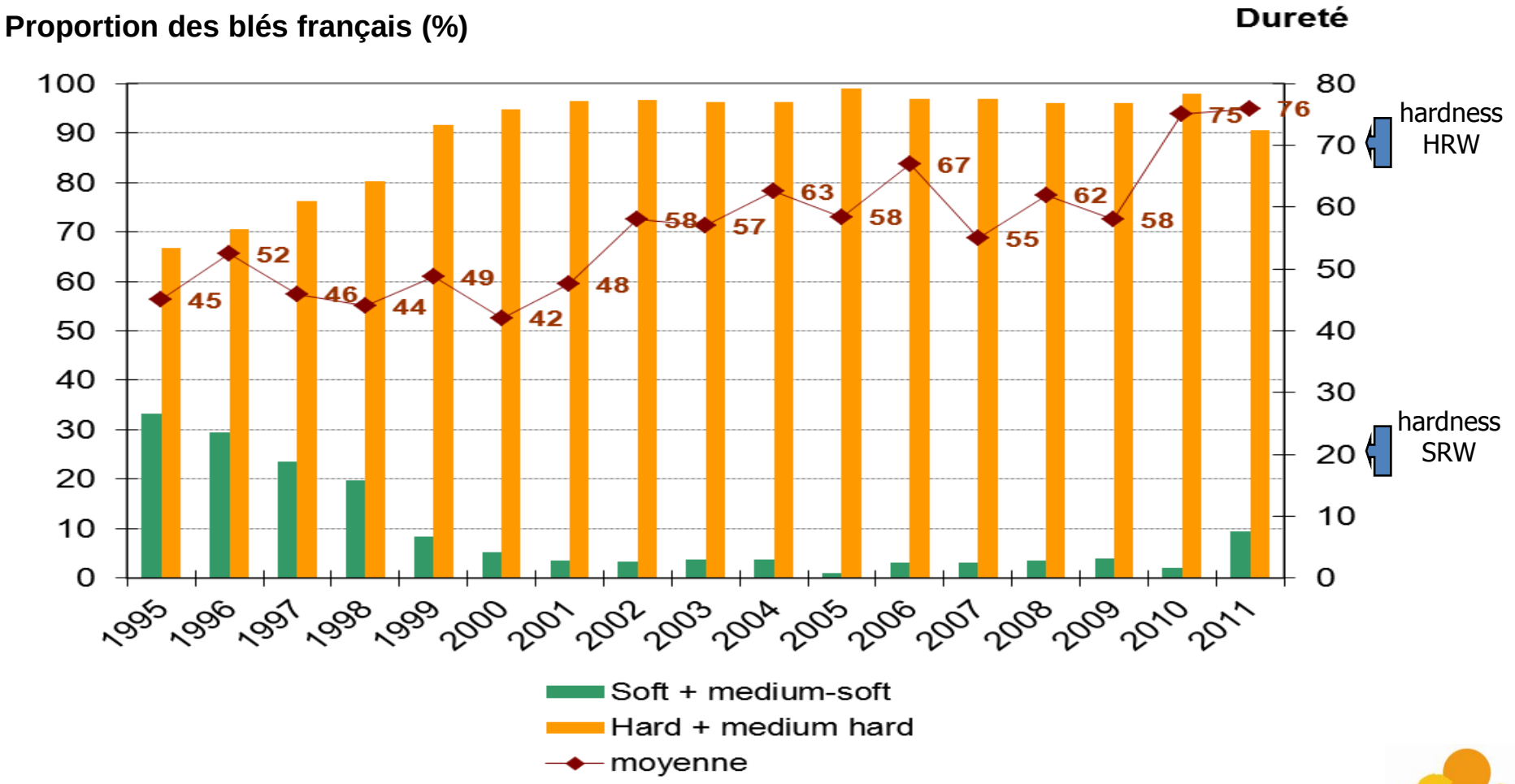
# Hardness: higher than for the last 10 years



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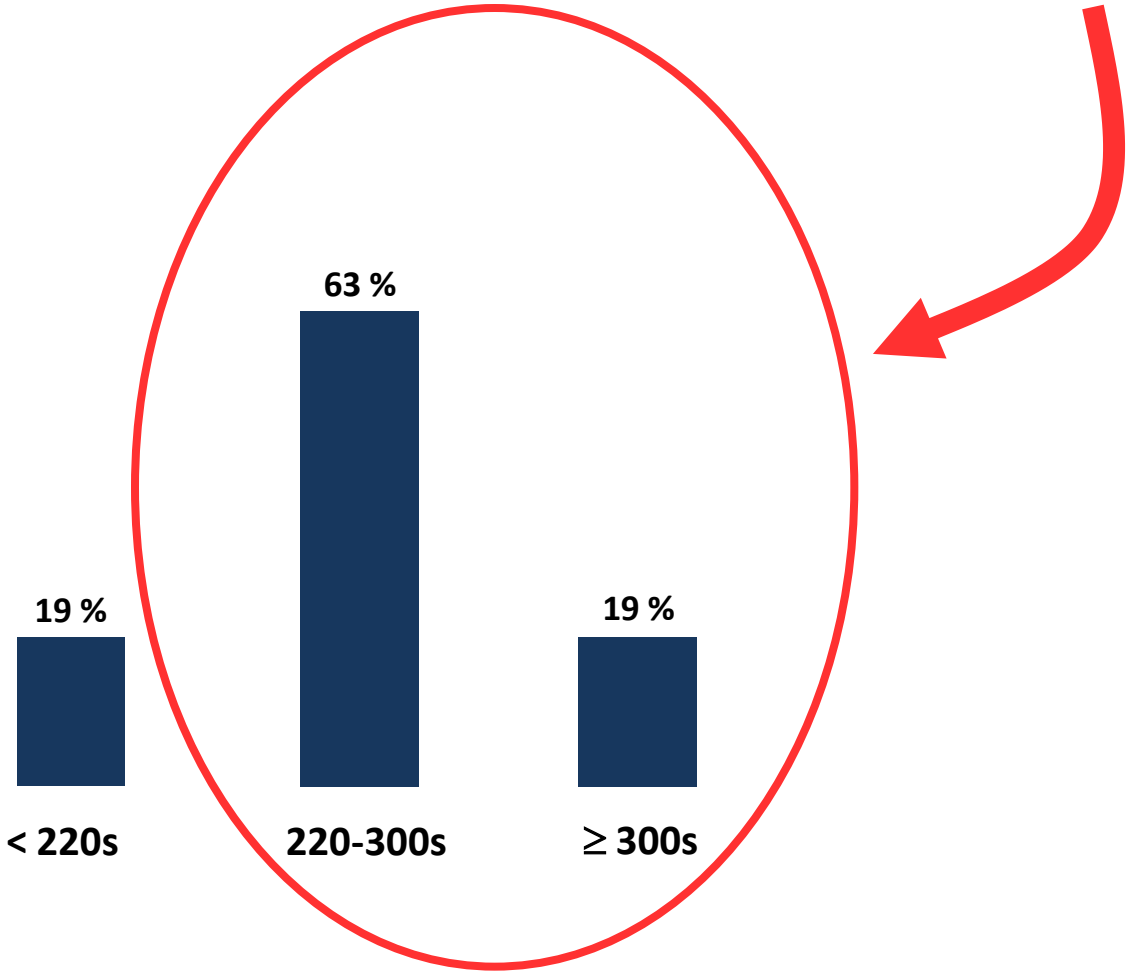
# Falling number: 81 % above 220s



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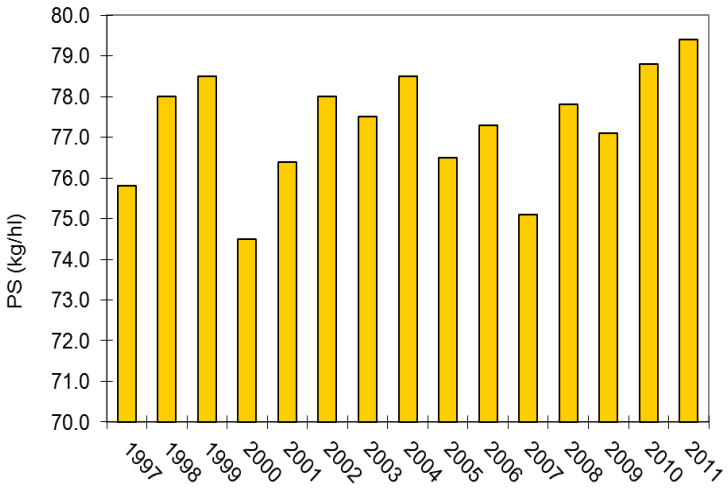
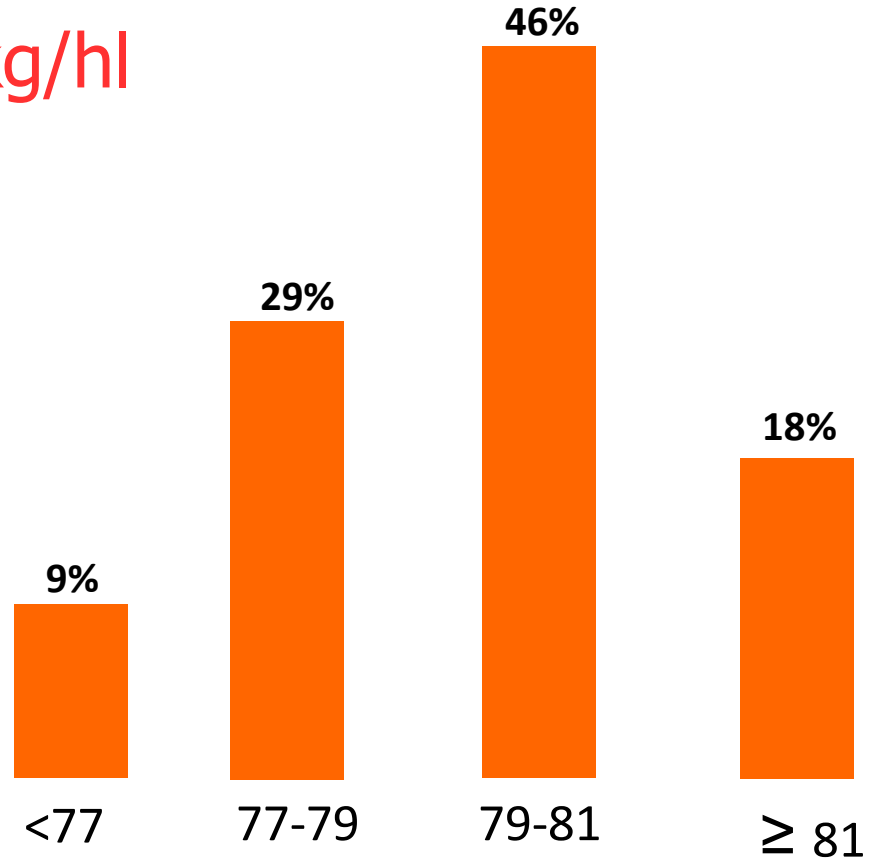
# Test weight: 79.4 kg/hl on average

≈100 % above
76 kg/hl



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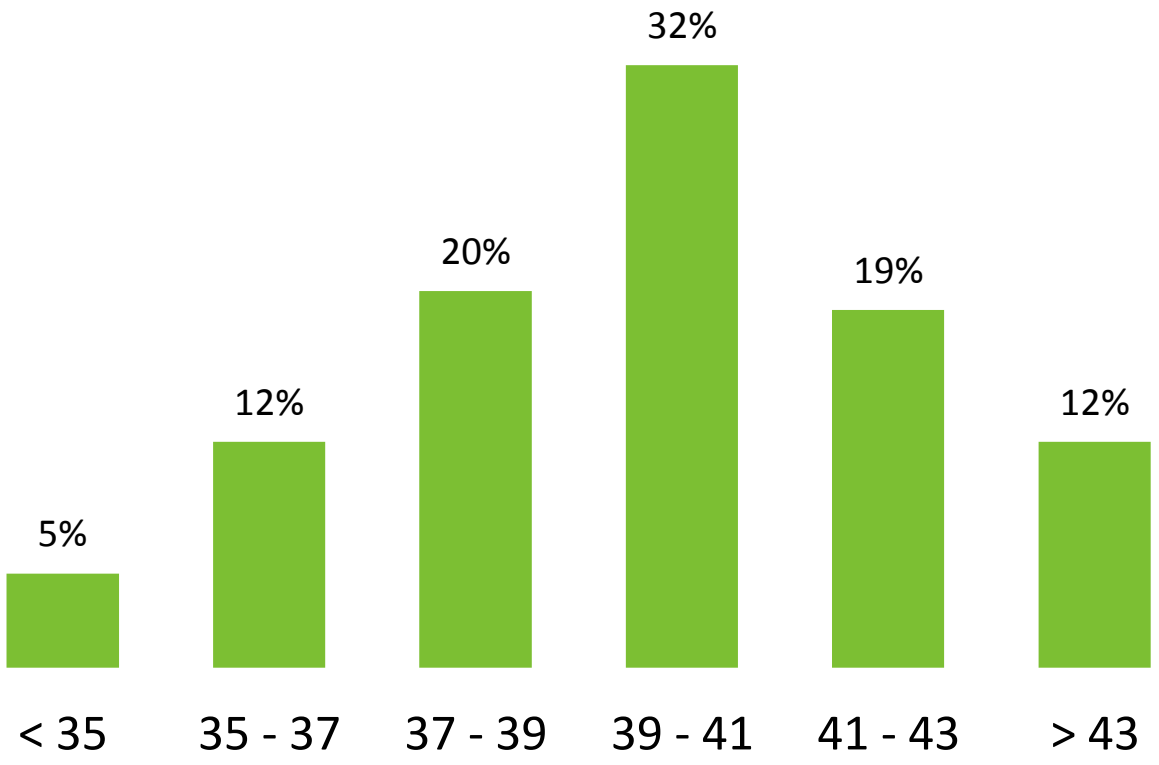
# Weight of 1000 kernels
# 40 g on average (DM basis)



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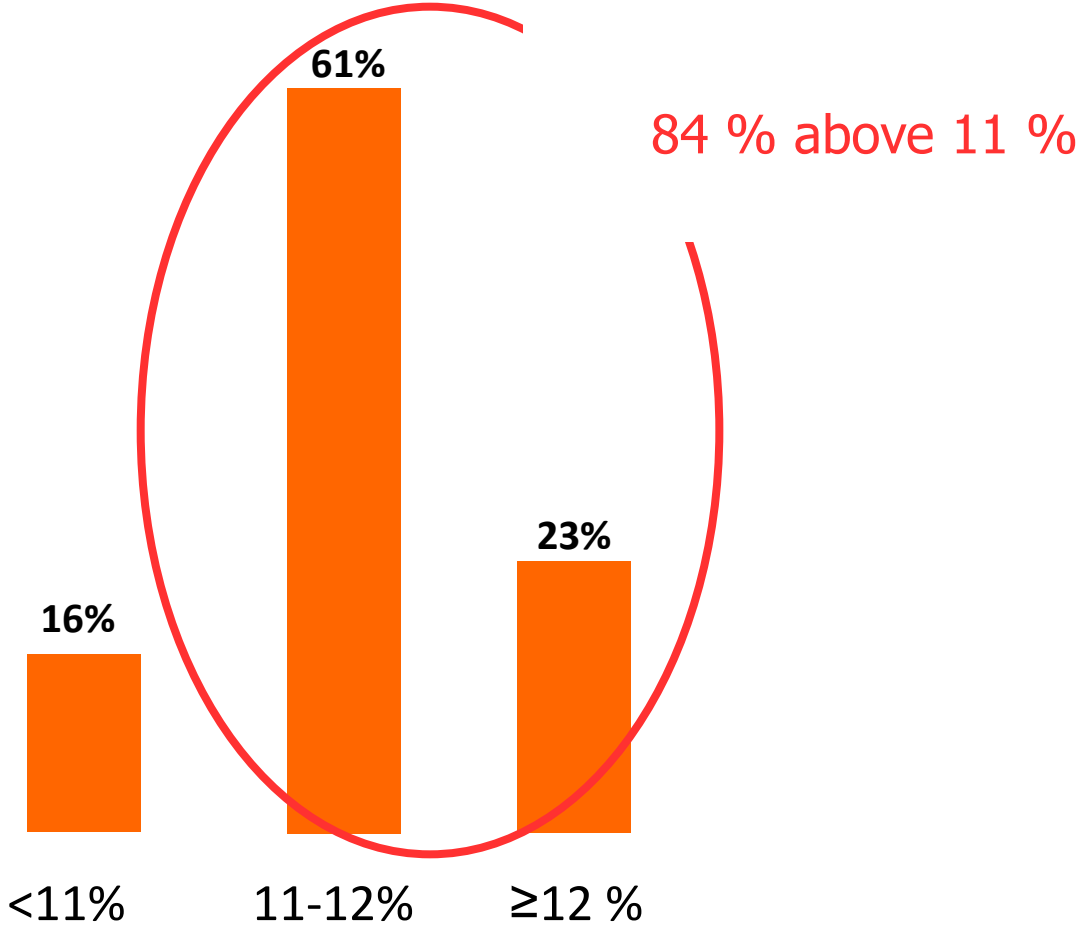
# Protein content : 11.5 % on average



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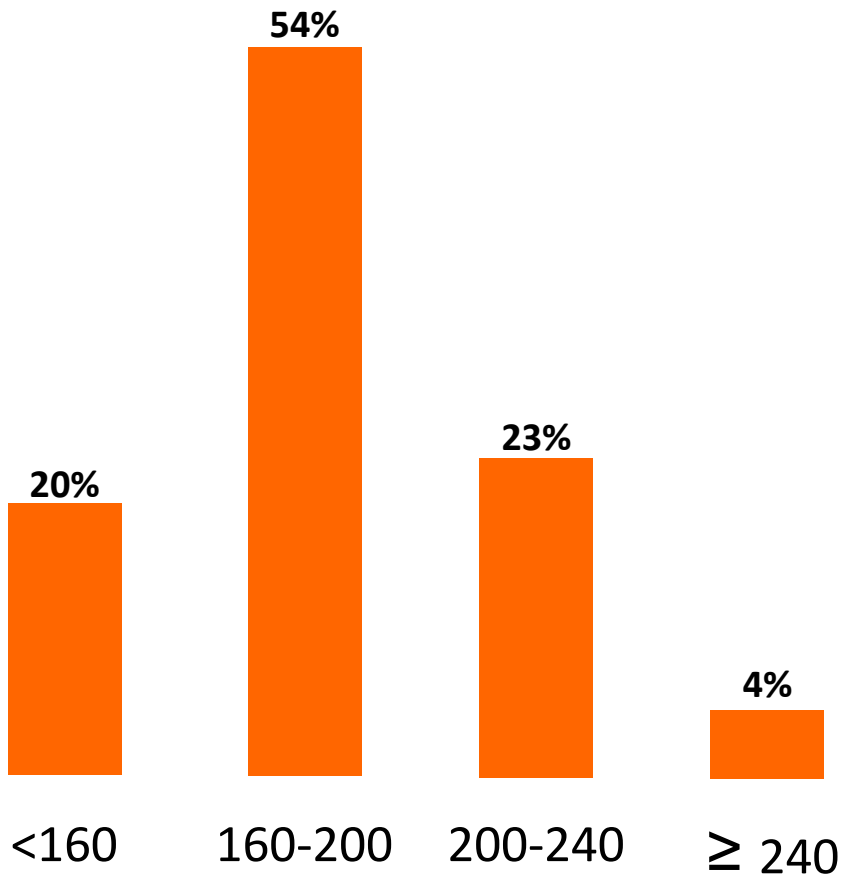
# Baking strength (W)



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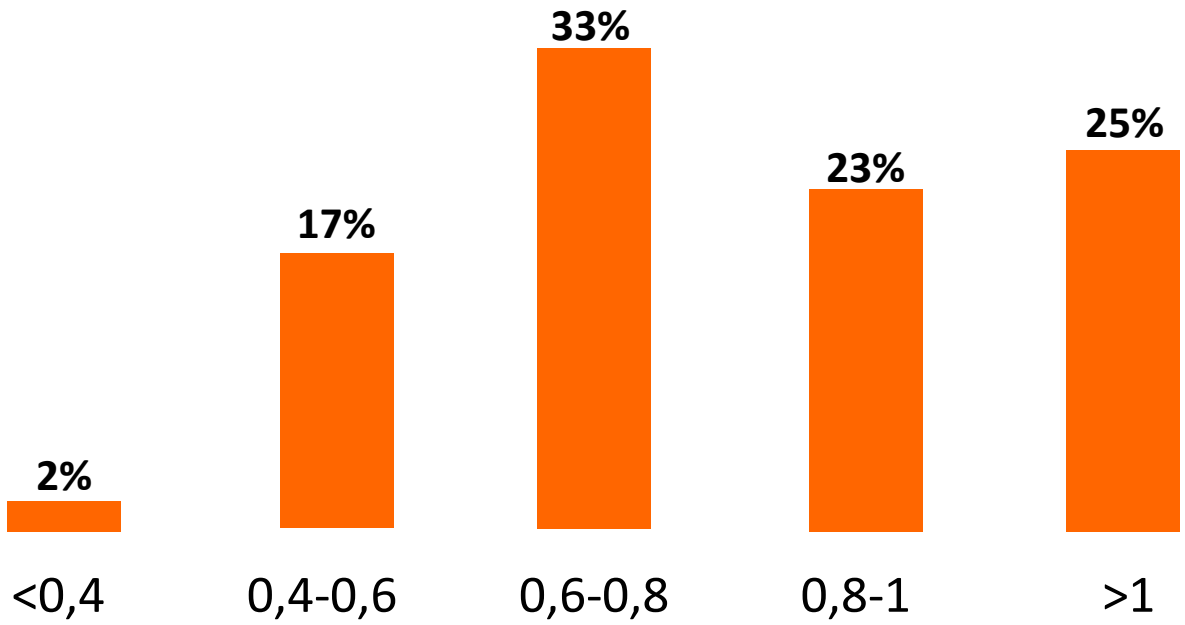
# Configuration ratio P/L



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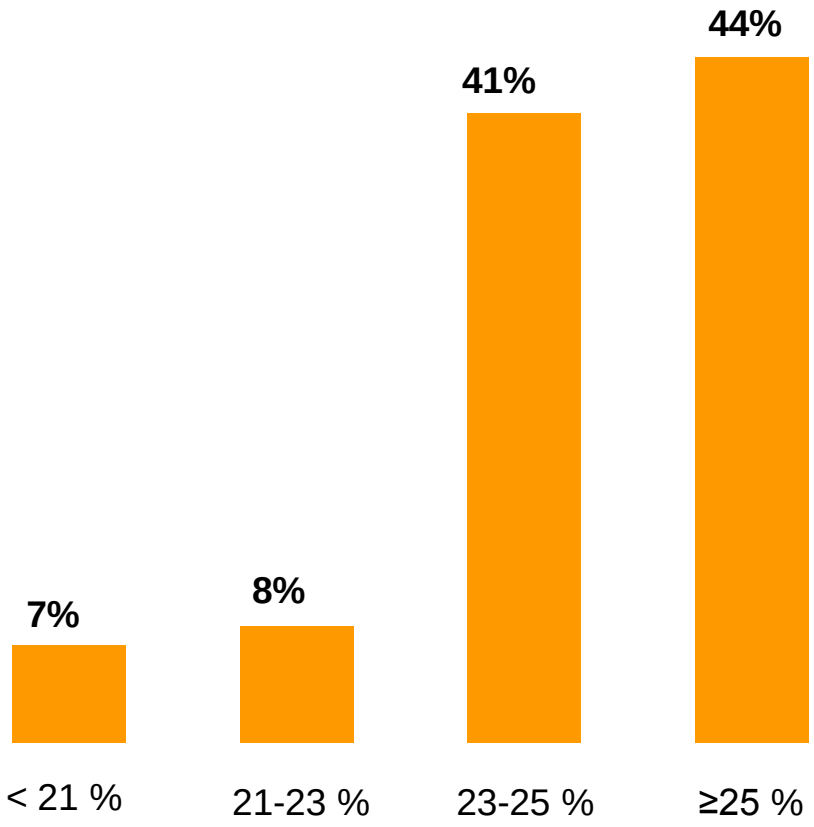
# Wet gluten: 24.7 % on average



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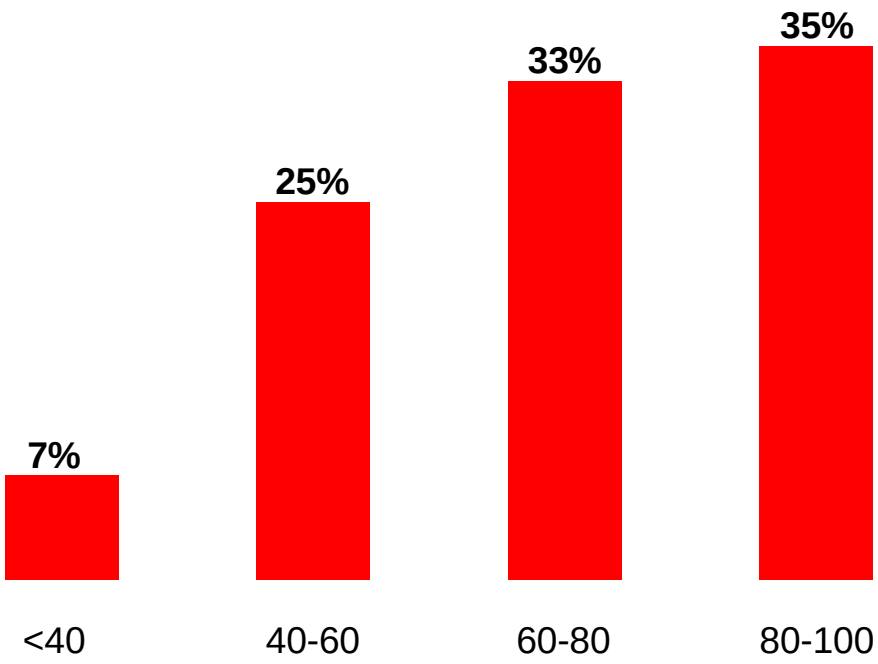
# Gluten Index: 68 on average






France export Céréales

# Conclusion

- High and regular level of production:
33.4 Mons t in 2011

- High and regular supply of the international market:
8 to 9 Mons t outside EU in 20011-2012

- No restrictions to exports

- Reliable logistic and delivery

- Regular milling and baking quality

- Suitable for a great variety of products

les céréales françaises : pour les marchés du monde

Merci pour votre attention

Thanks for your attention

شكرا لانتباهكم

感谢关注

Obrigado pela vossa atenção

Gracias por su atención

Спасибо за ваше внимание

Danke für Ihre Aufmerksamkeit

با تشکر از توجه شما