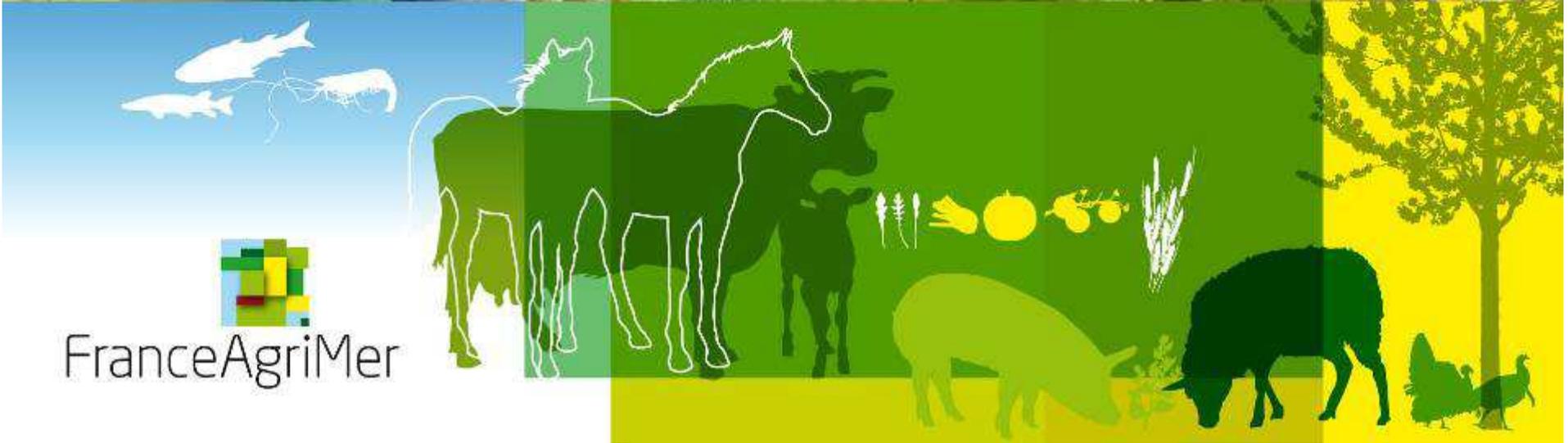


CÉRÉALES /
FRUITS ET LÉGUMES /
HORTICULTURE /
LAIT /
OLÉO-PROTÉAGINEUX /
PÊCHE ET AQUACULTURE /
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /
SUCRE /
VIANDES BLANCHES /
VIANDES ROUGES /
VINS /

FranceAgriMer



FranceAgriMer

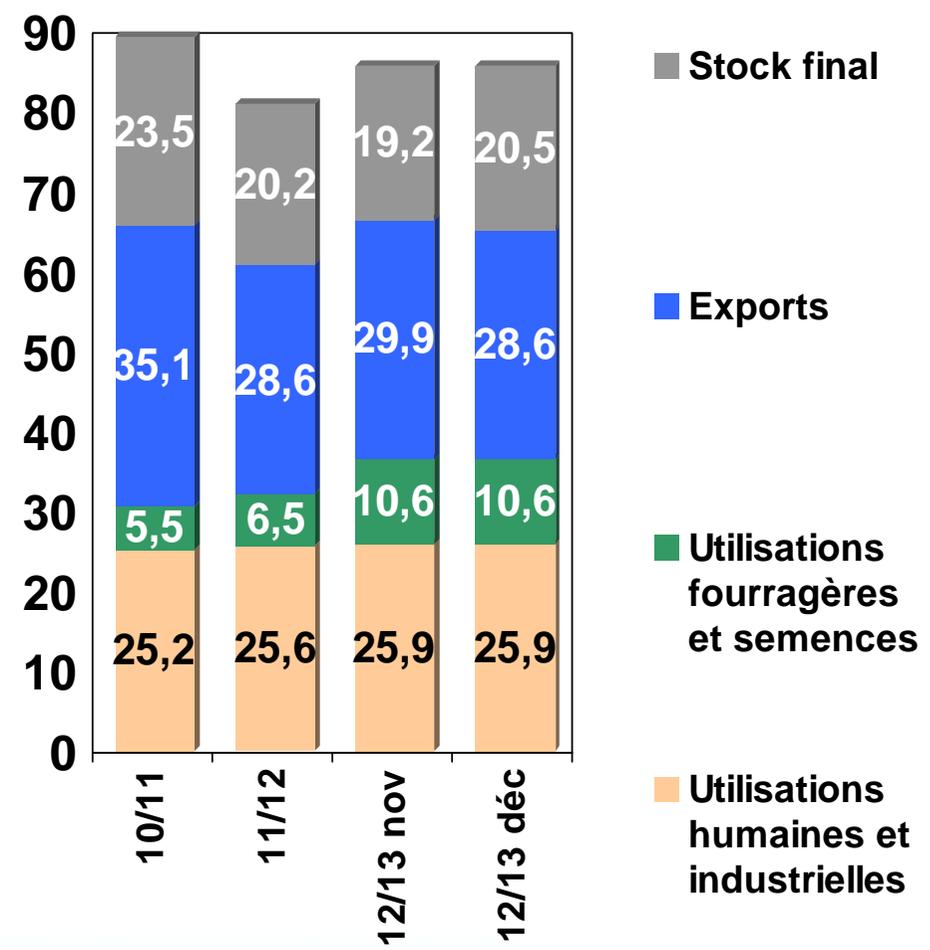
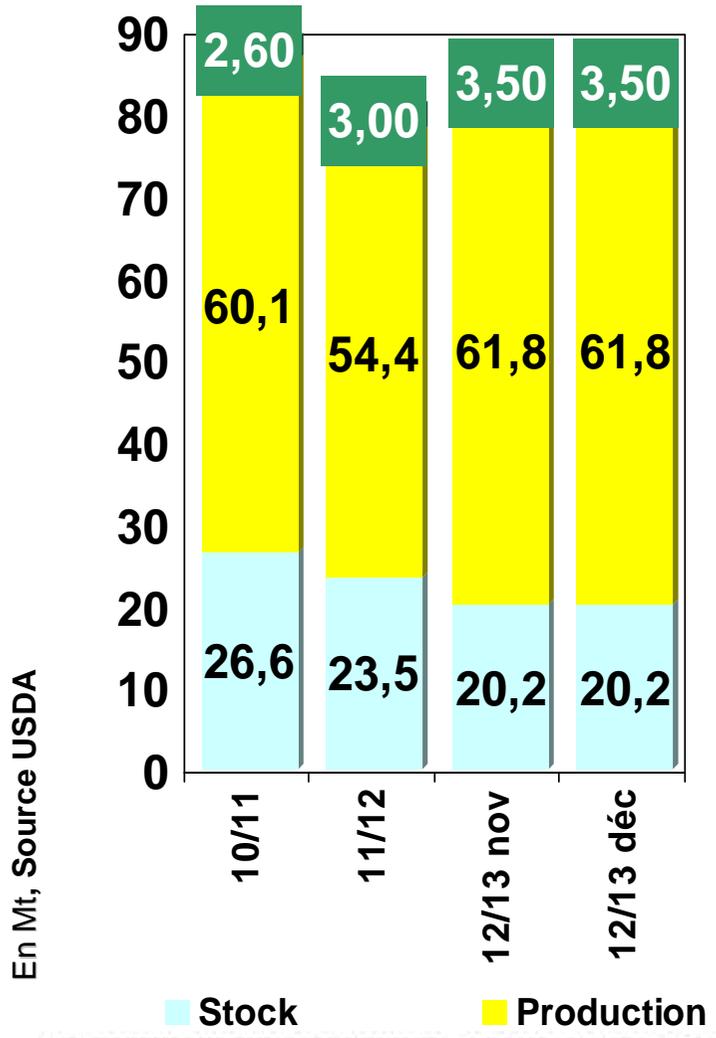


Marché mondial

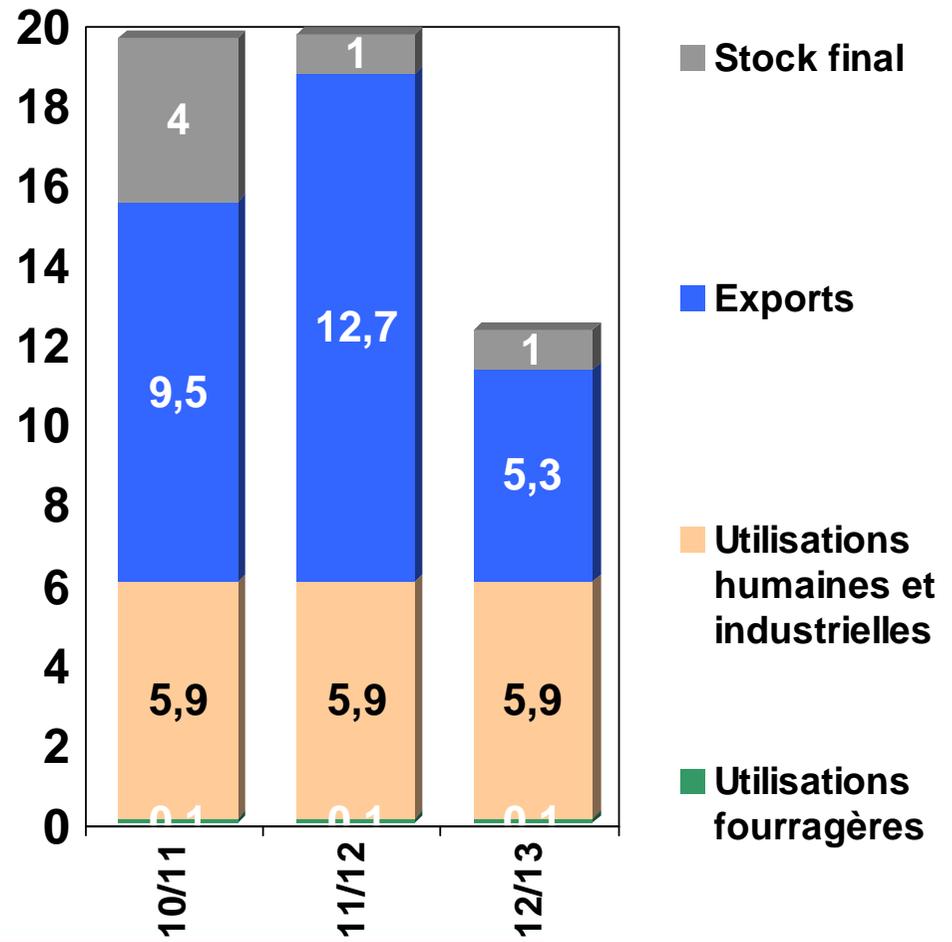
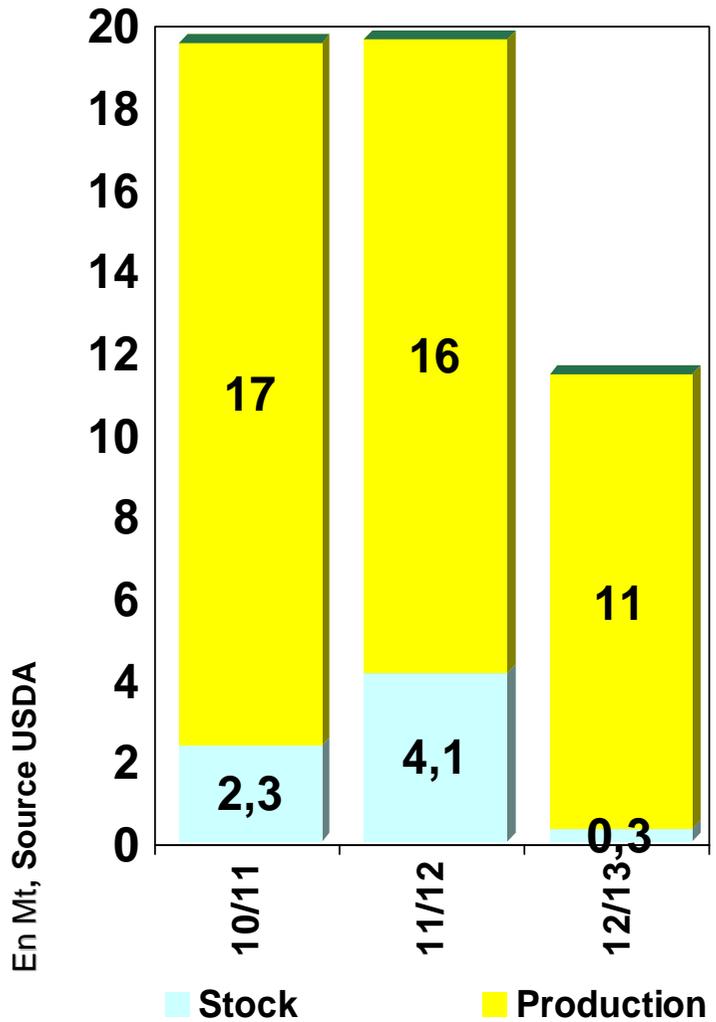
Points clefs

- Le CIC projette des surfaces de blé en hausse de 5 Mha pour la récolte 2013
- Bilan maïs mondial revu par l'USDA :
 - Plus de production, plus de consommation
 - La Chine dépasse les 200 Mt de production
- Argentine et Brésil au cœur de la deuxième partie de campagne
- Nouvelle hausse des exportations françaises vers les pays tiers

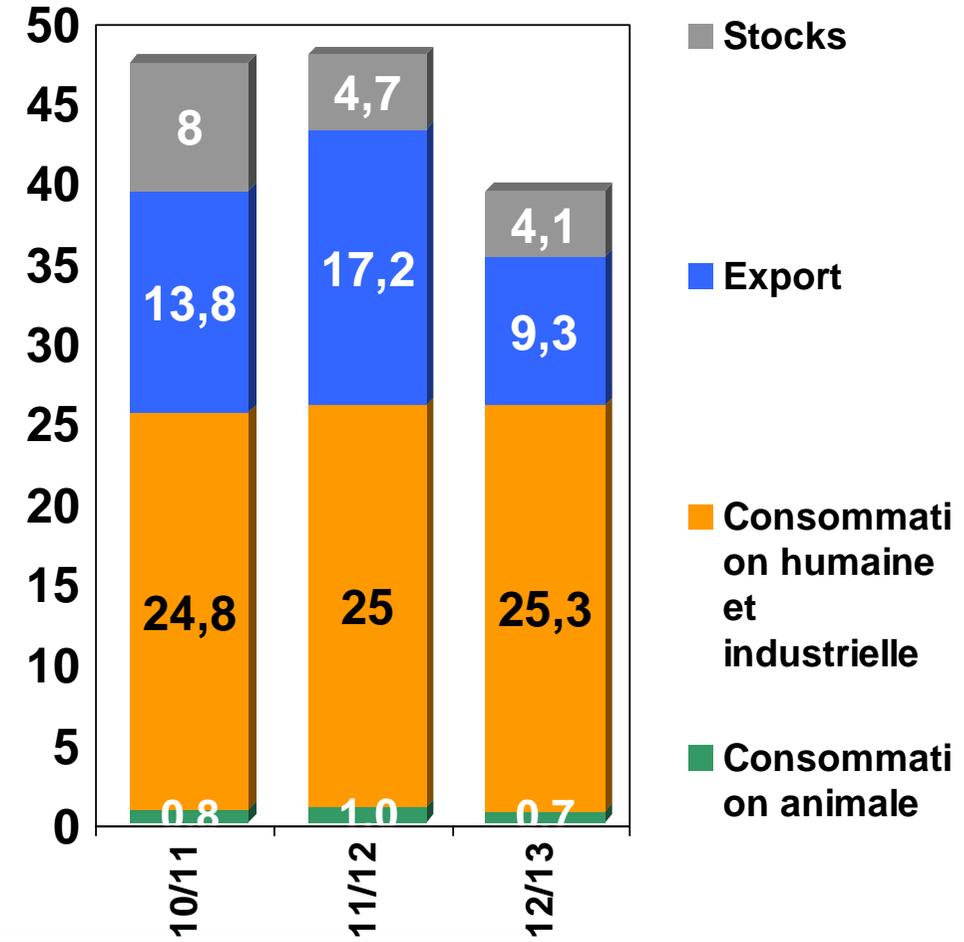
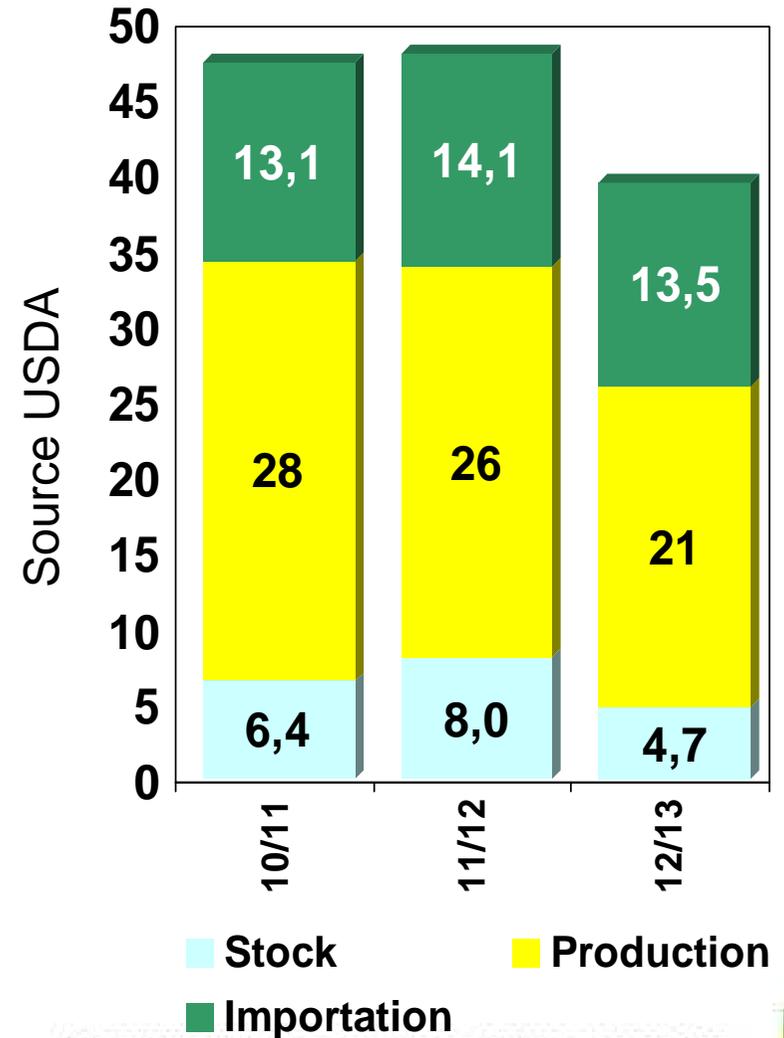
Etats Unis : bilan blé



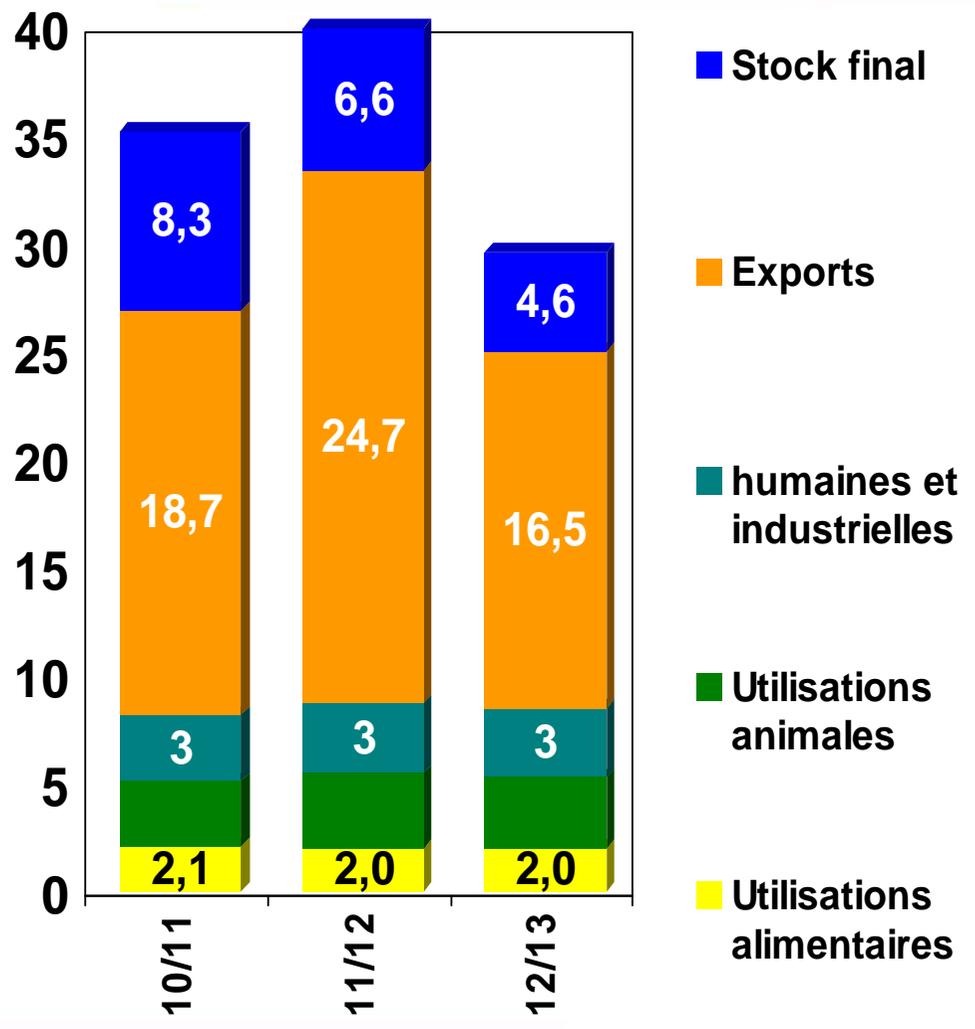
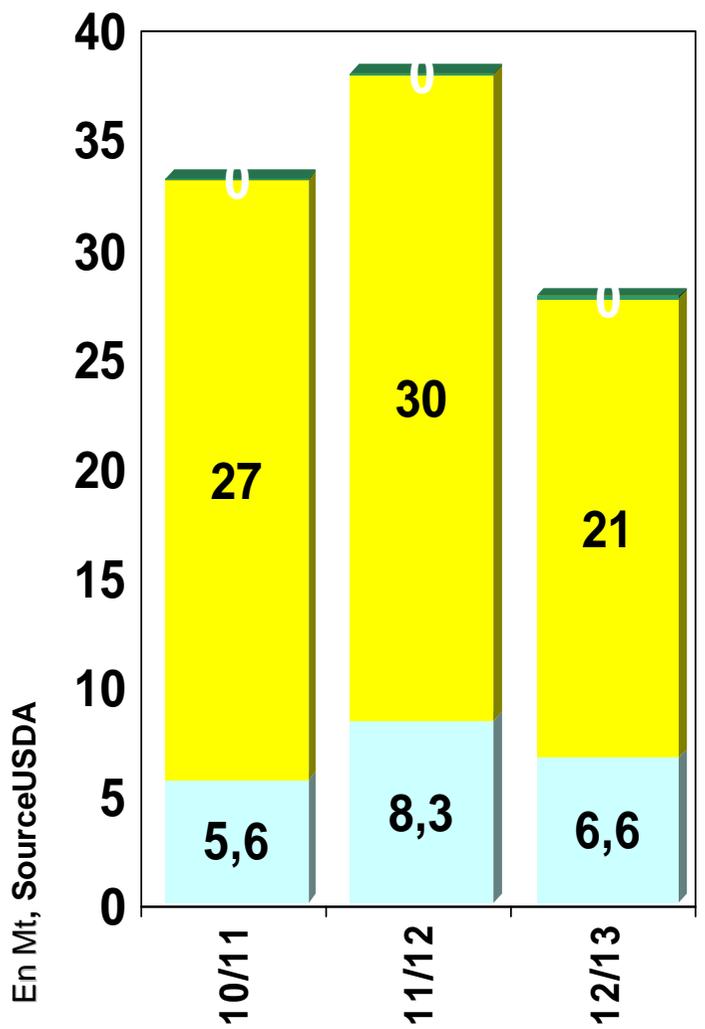
Argentine : bilan blé



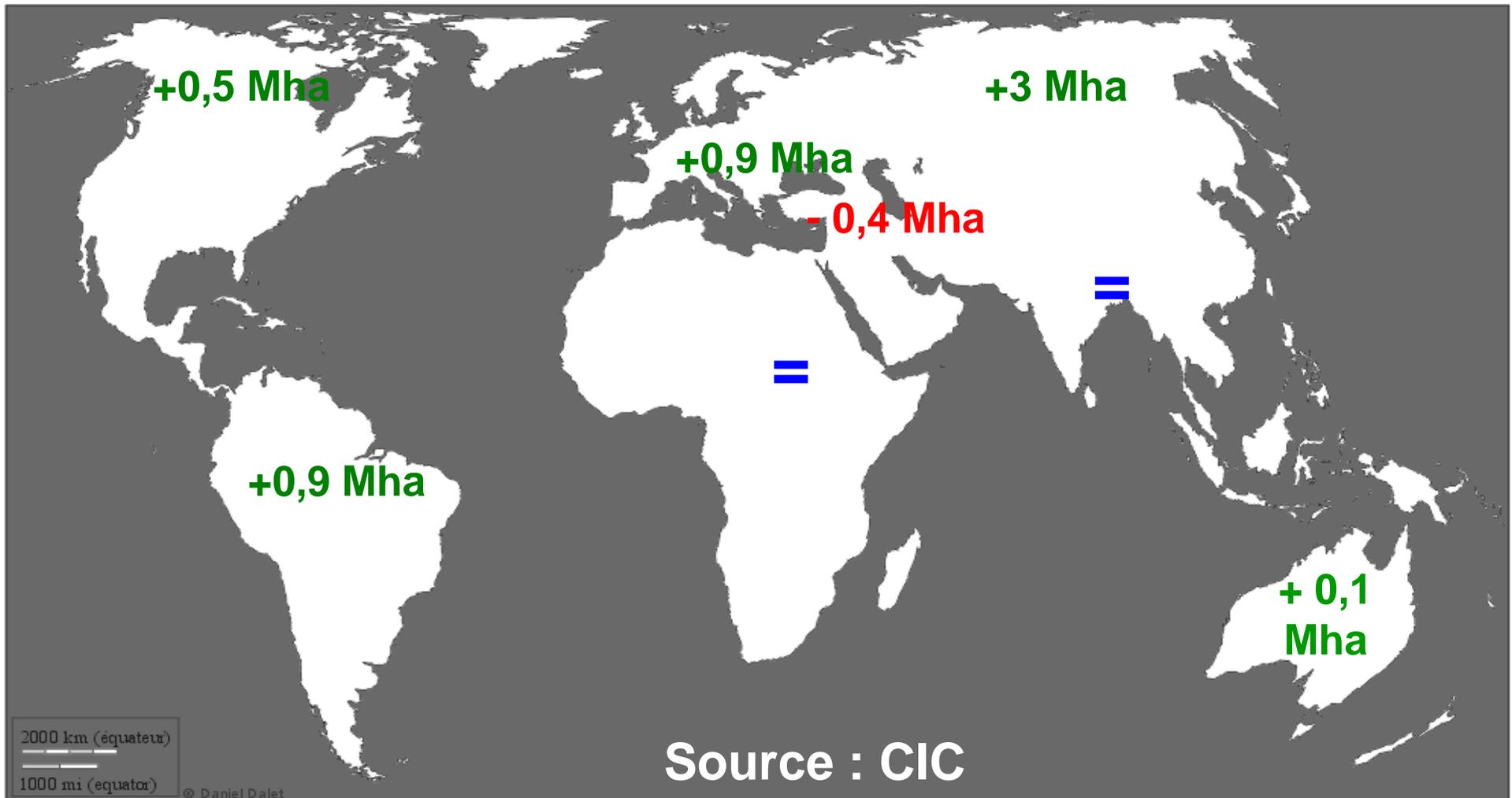
Bilan blé Amérique du Sud



Australie : bilan blé

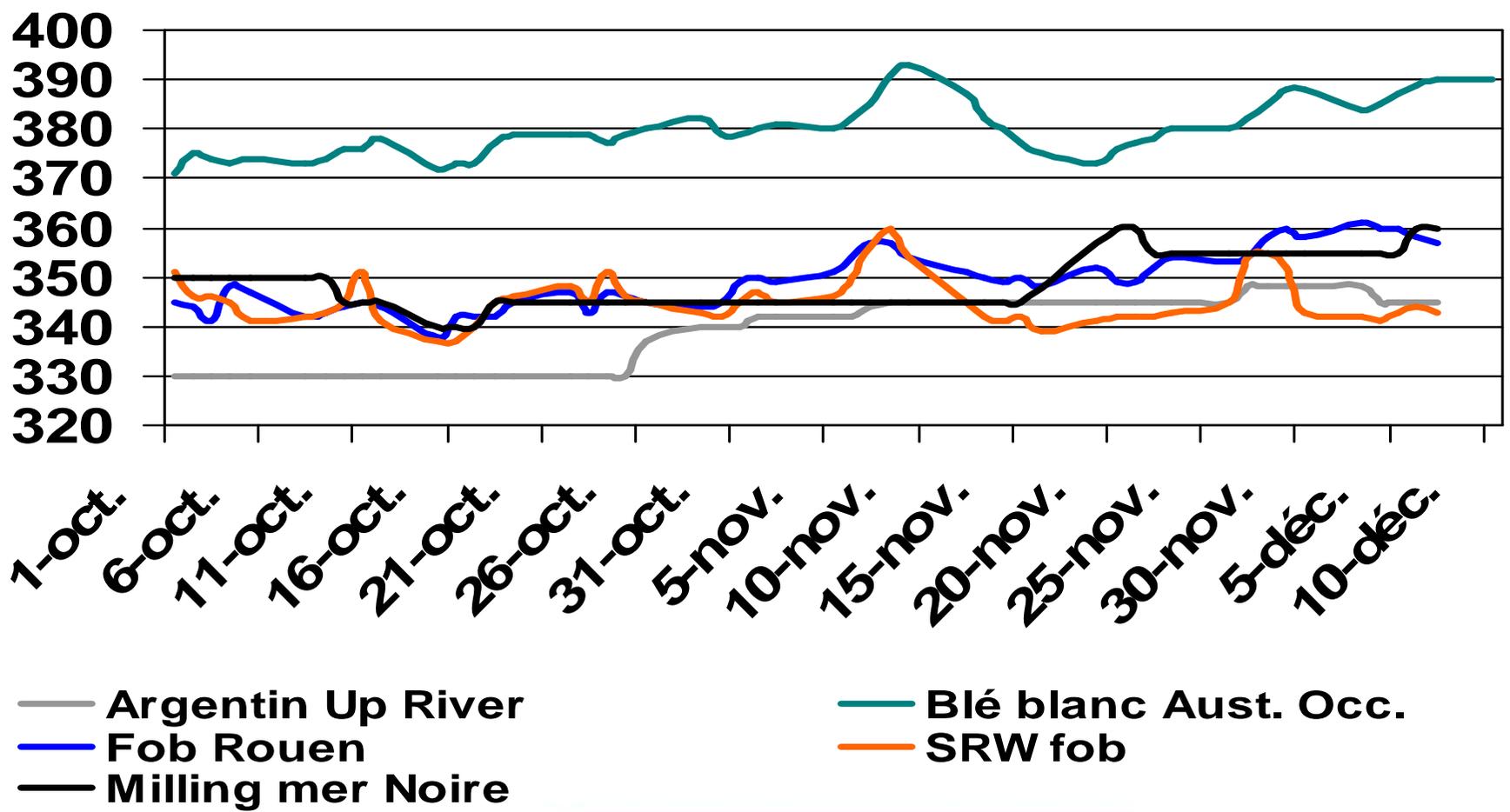


Surfaces mondiales dédiées au blé pour la récolte 2013:
223,2 Mha soit + 5 Mha

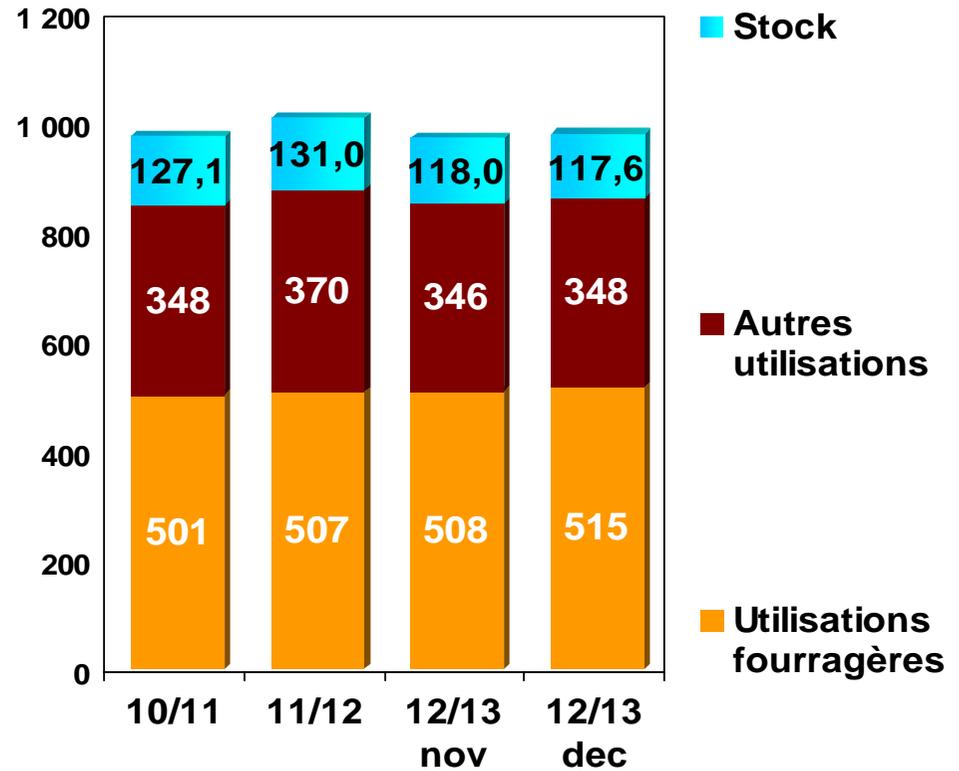
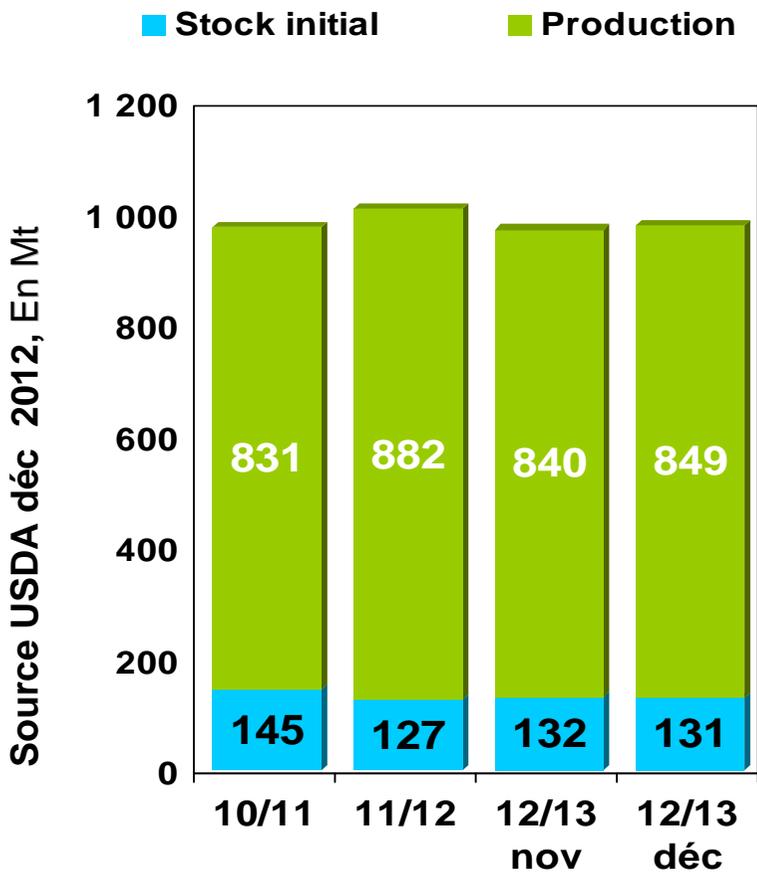




Cours du blé



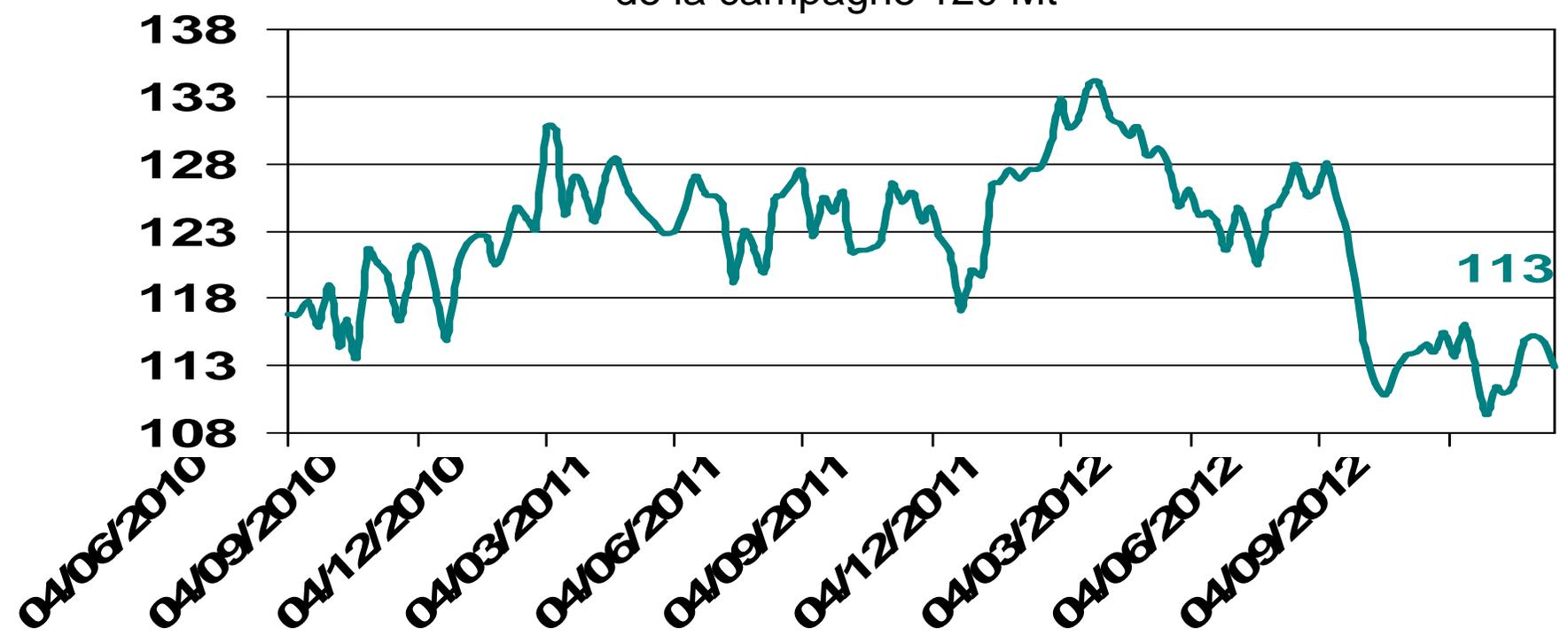
Monde, bilan maïs 2012/13



Equivalent tonnage annuel de maïs de la production hebdomadaire d'éthanol aux Etats-Unis

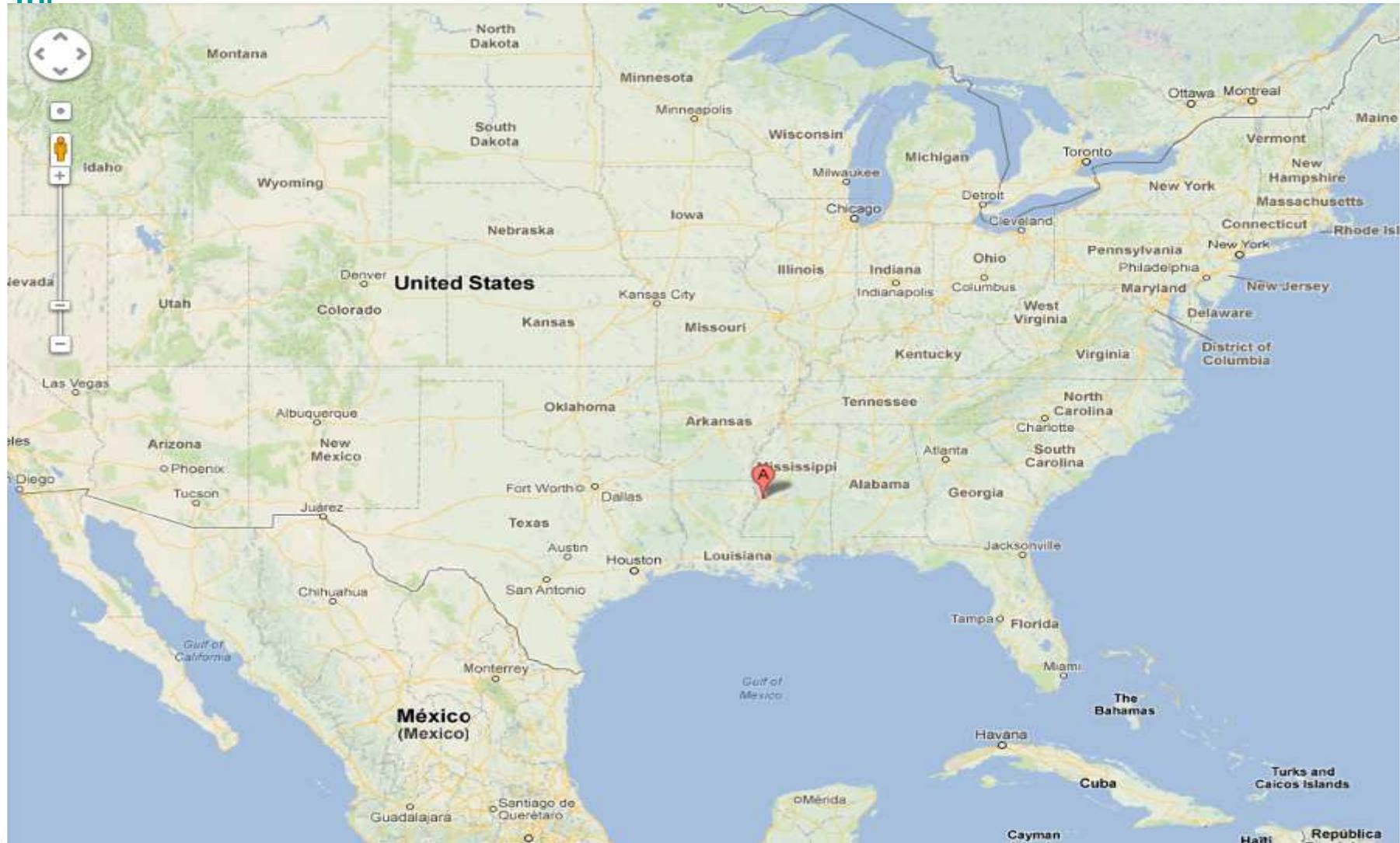
Moyenne depuis le début de la campagne 120 Mt

En Mt, calcul de FranceAgriMer



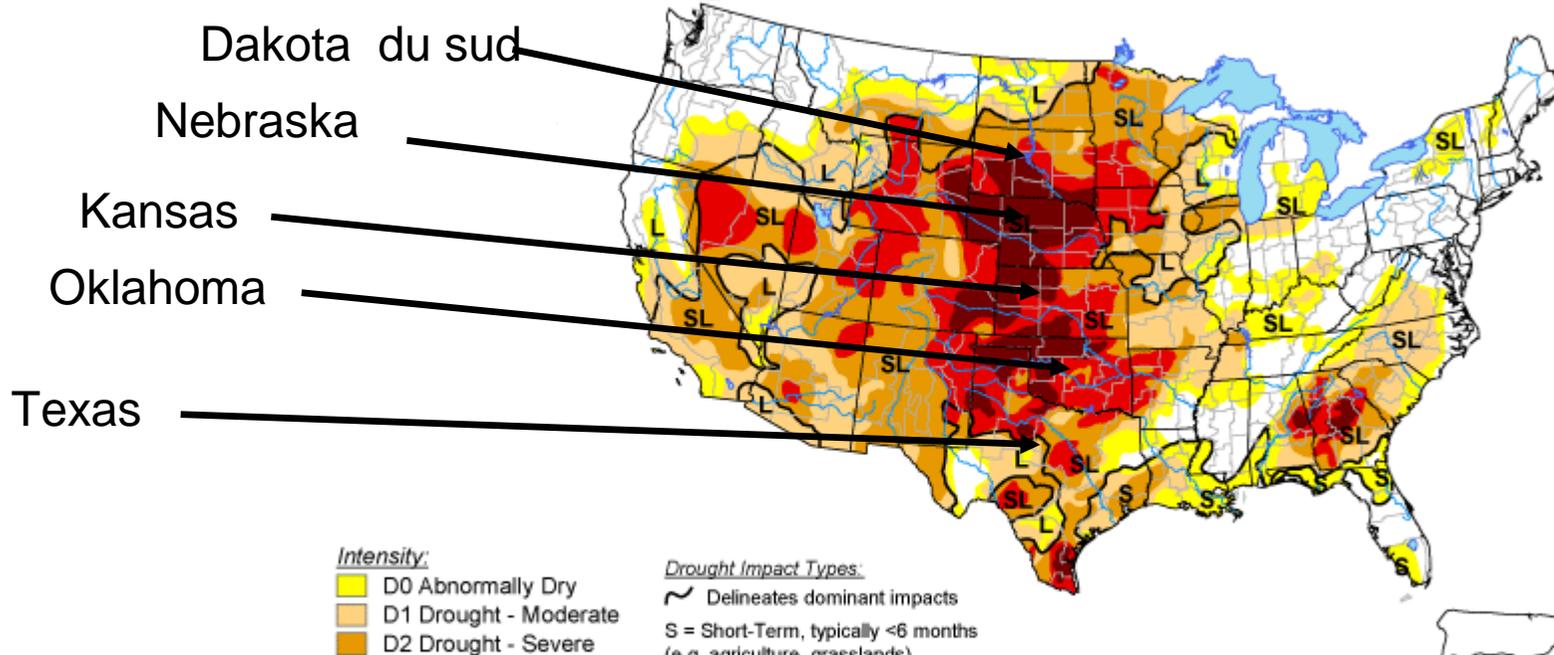


Hauteur du Mississippi à Vicksburg (MS)



U.S. Drought Monitor

December 4, 2012
Valid 7 a.m. EST



Intensity:

- D0 Abnormally Dry
- D1 Drought - Moderate
- D2 Drought - Severe
- D3 Drought - Extreme
- D4 Drought - Exceptional

Drought Impact Types:

- Delineates dominant impacts
- S = Short-Term, typically <6 months (e.g. agriculture, grasslands)
- L = Long-Term, typically >6 months (e.g. hydrology, ecology)

The Drought Monitor focuses on broad-scale conditions. Local conditions may vary. See accompanying text summary for forecast statements.

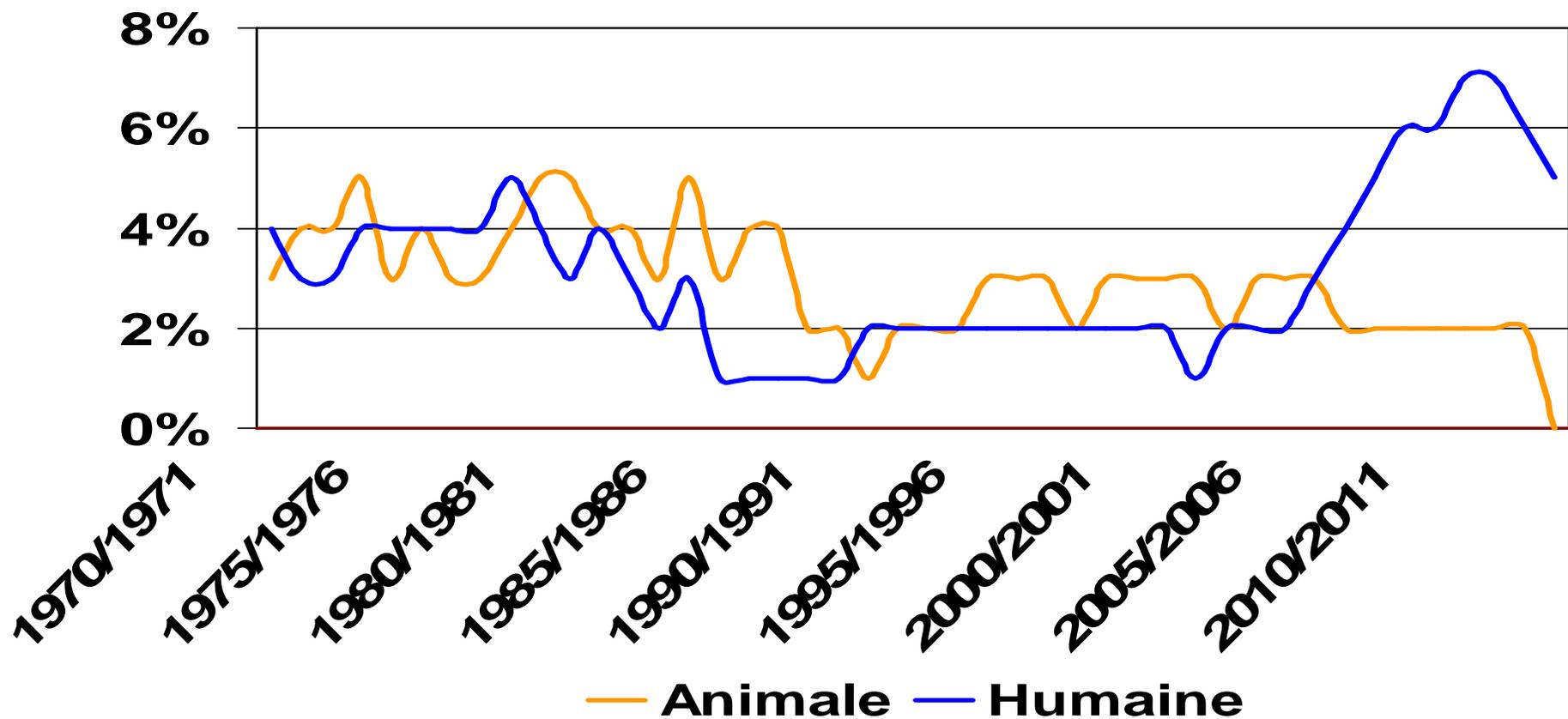
<http://droughtmonitor.unl.edu/>



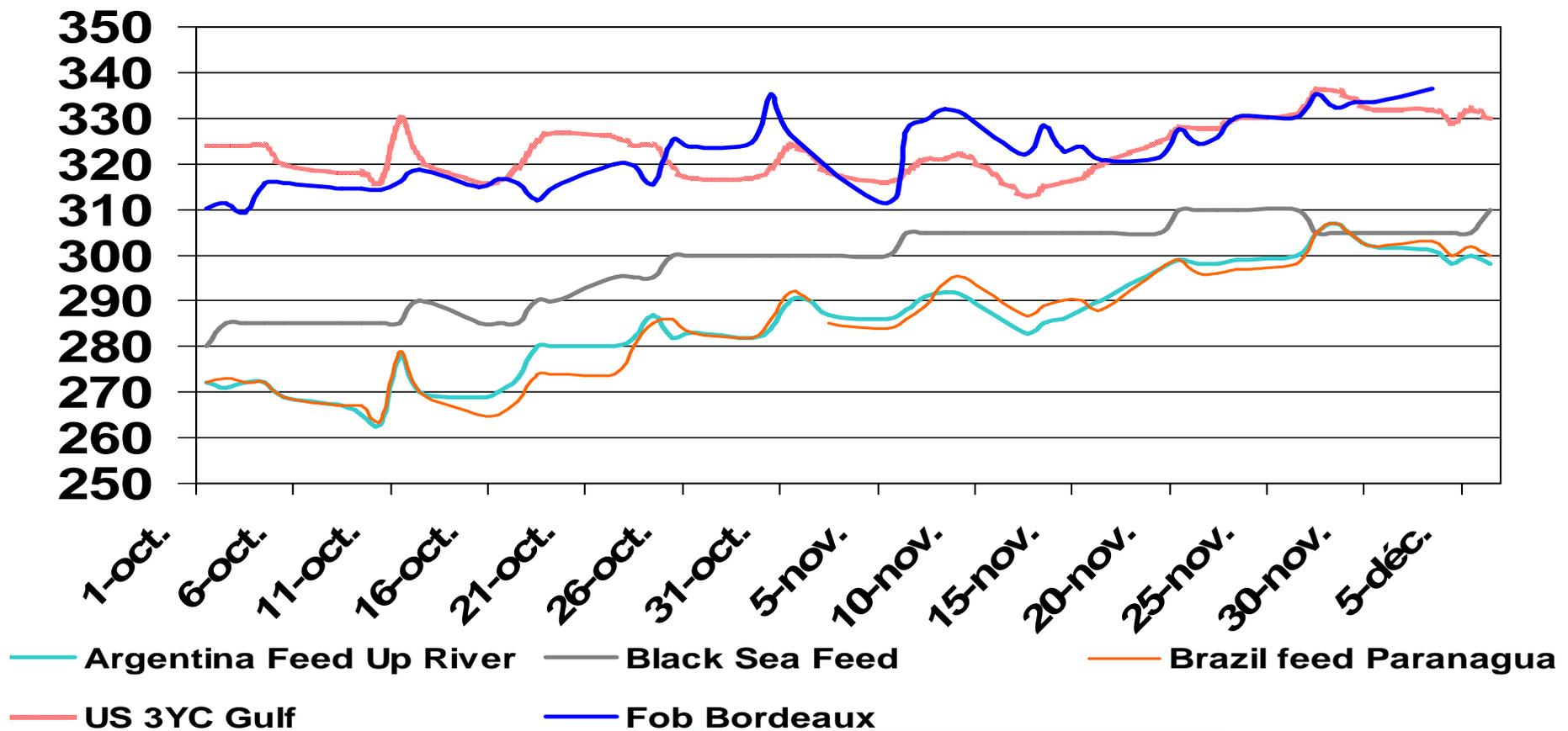
Released Thursday, December 6, 2012

Author: Rich Tinker, NOAA/NWS/NCEP/CPC

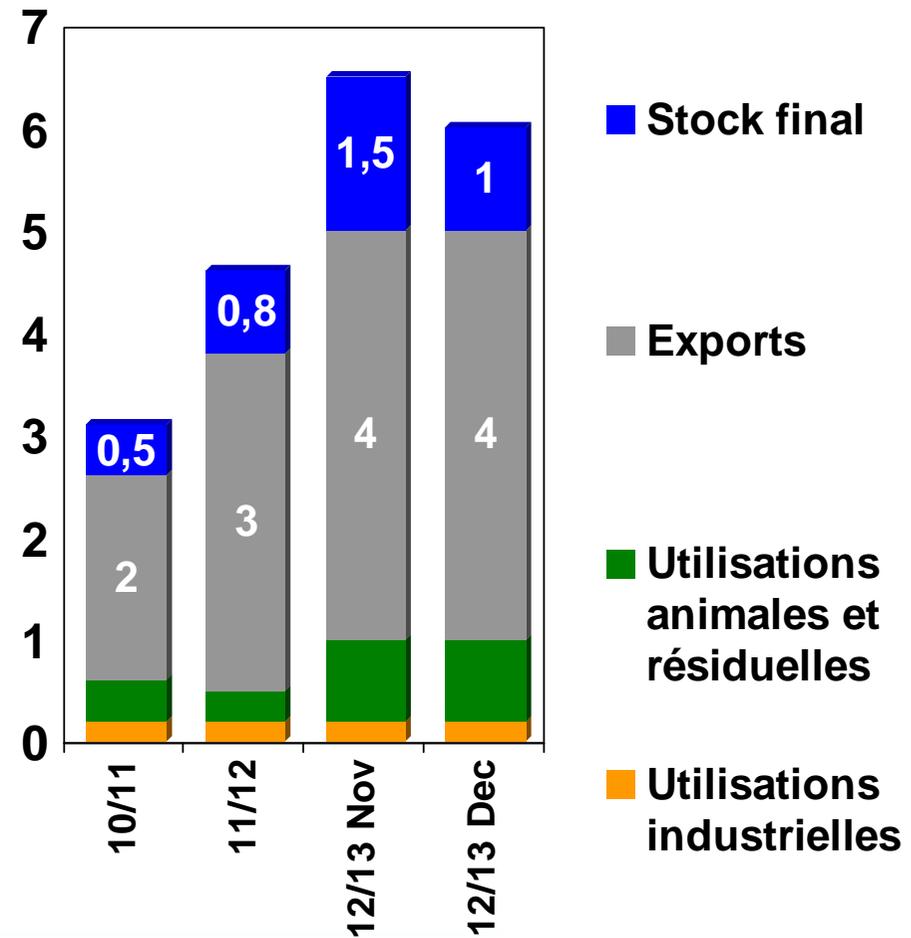
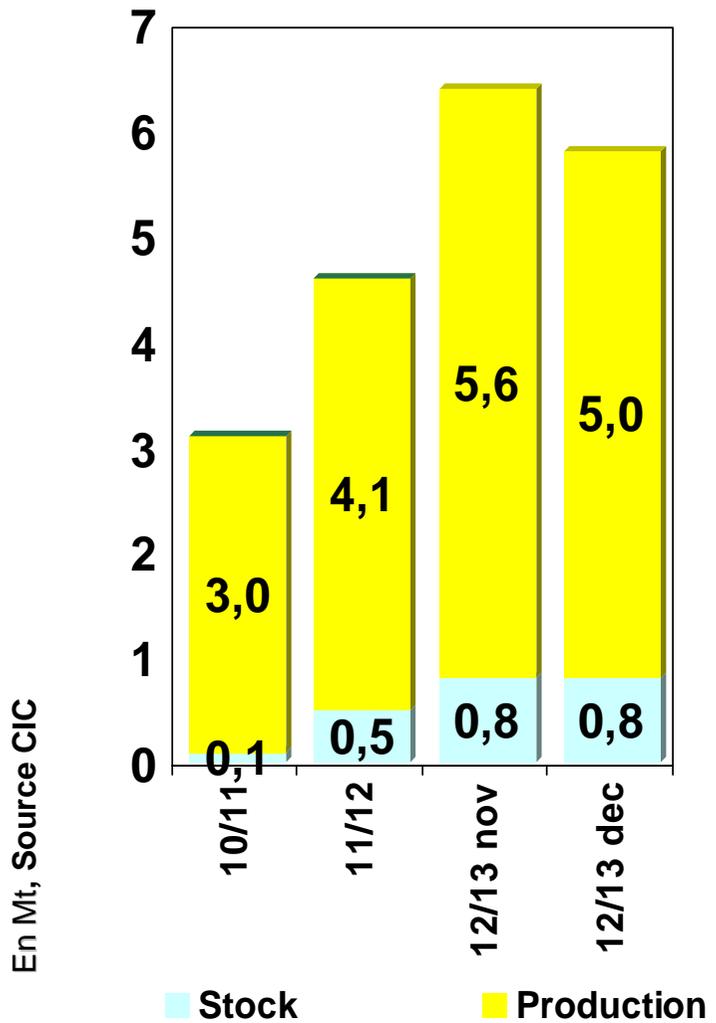
Taux de croissance de la consommation mondiale de maïs



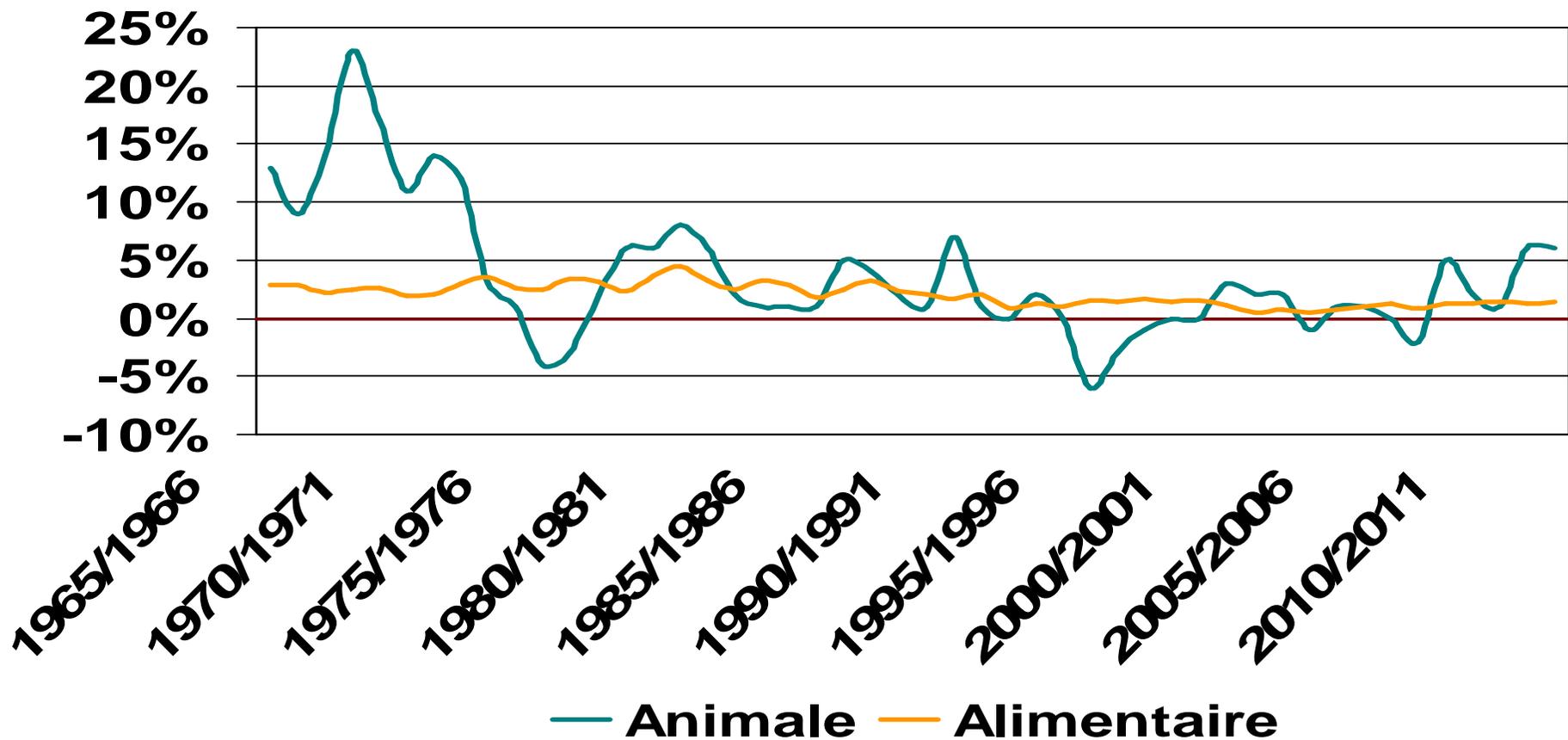
Cours du maïs



Argentine : bilan orge



Taux de croissance de la consommation mondiale de blé

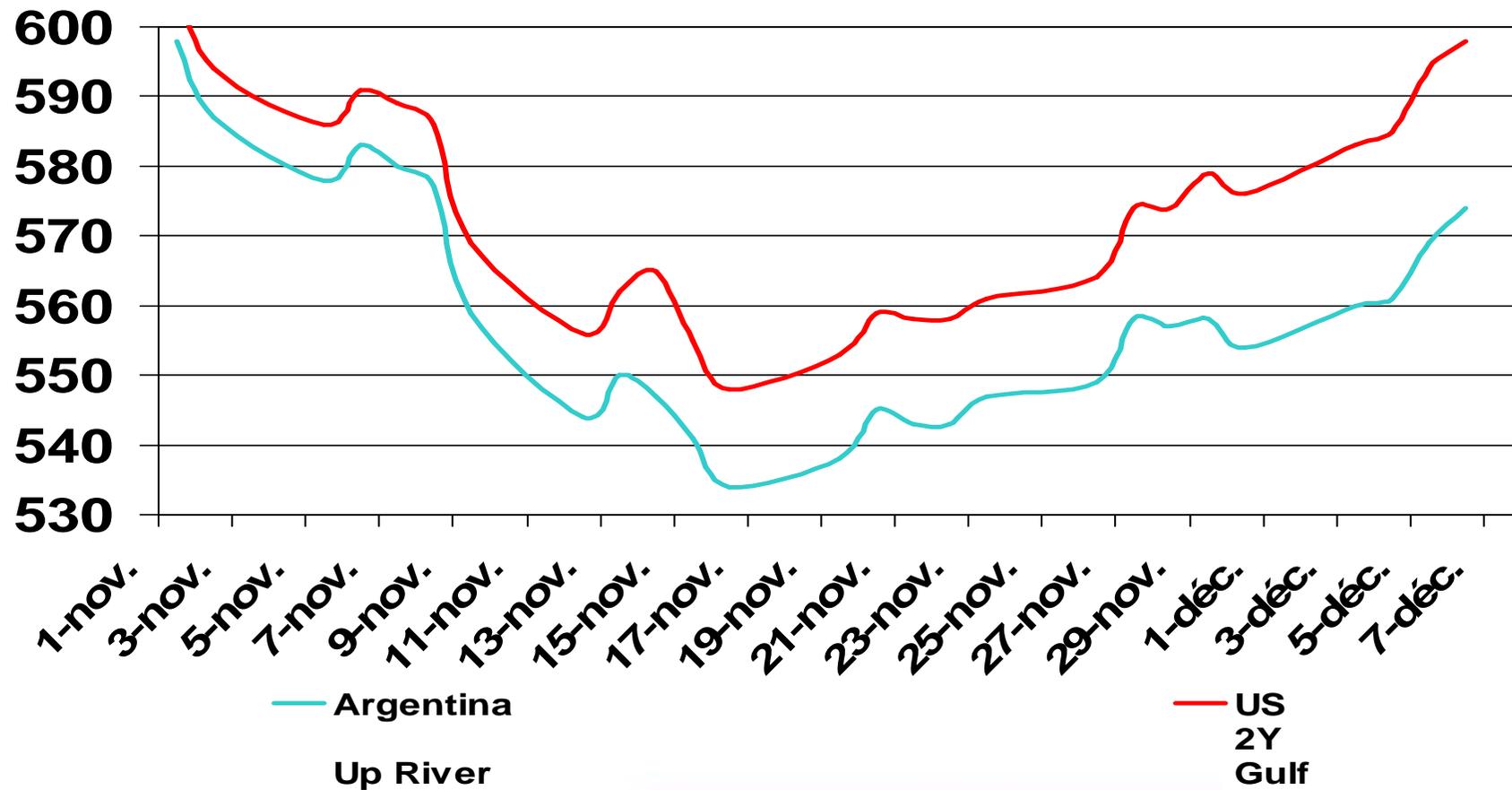


Focus maïs-soja Argentine Brésil

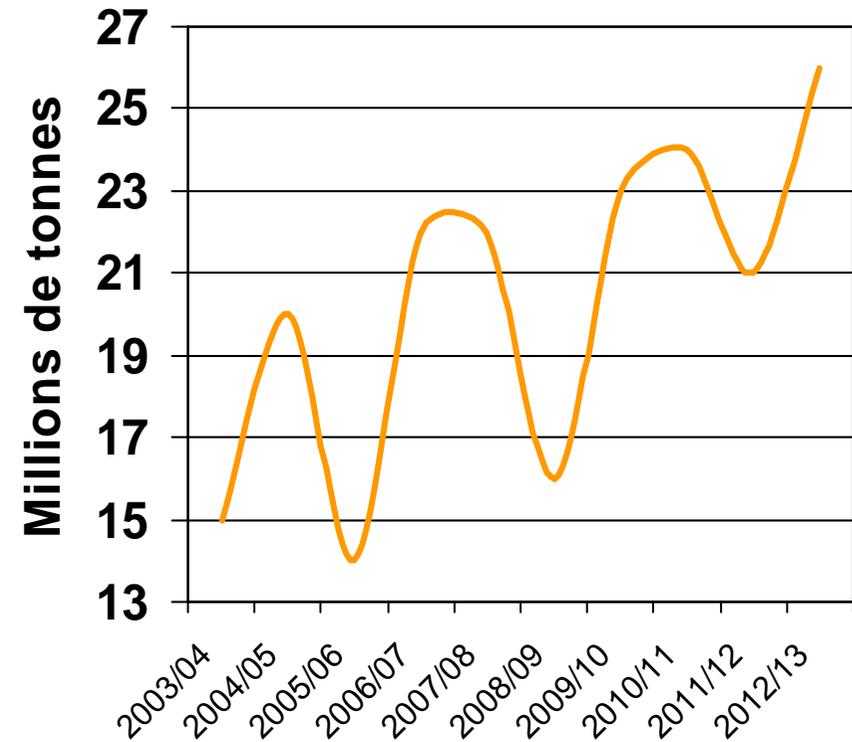
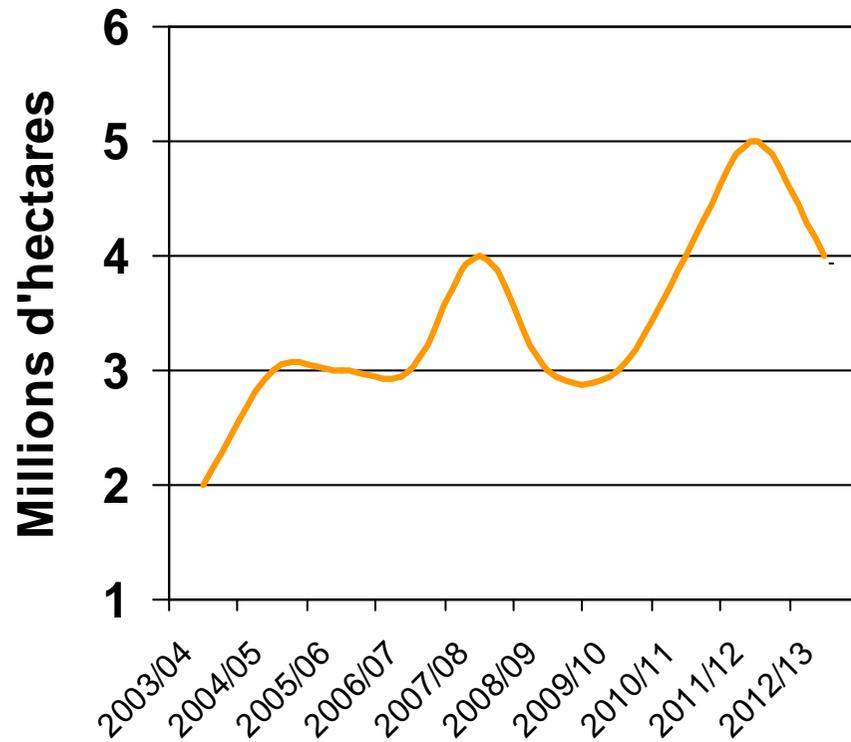




Cours du soja

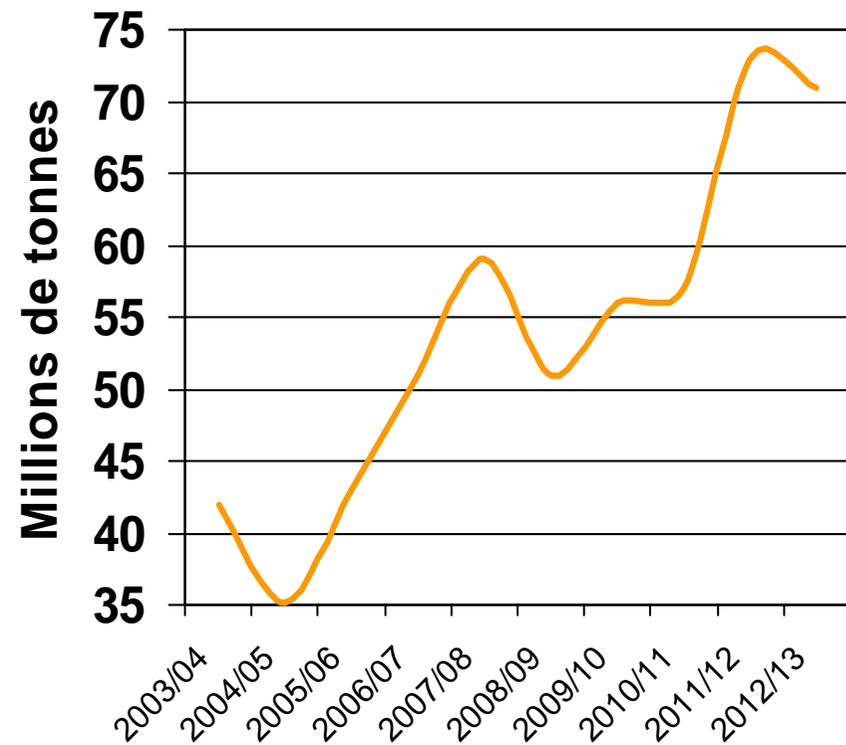
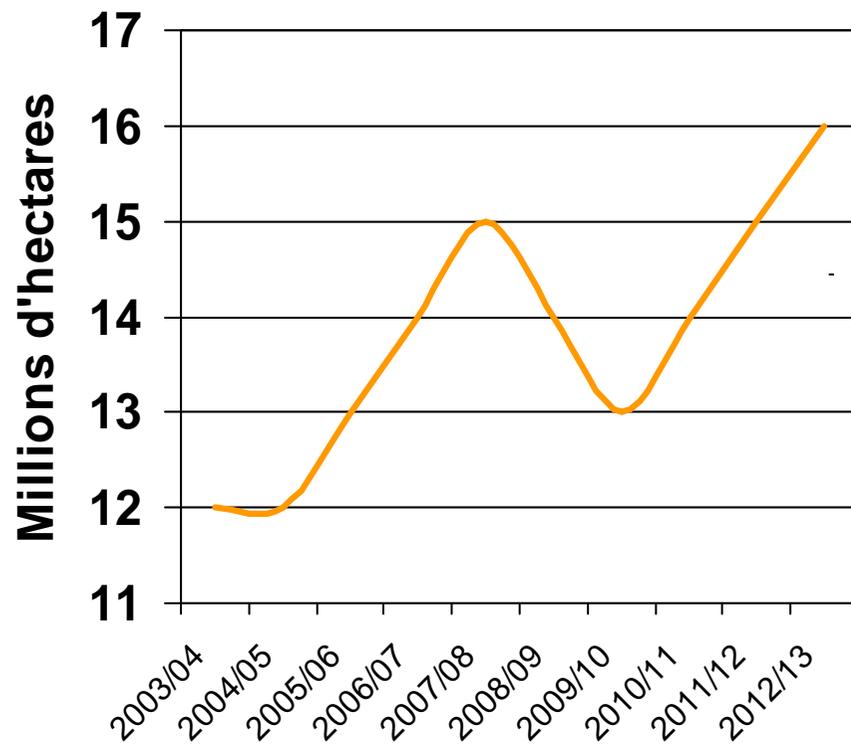


Surface et production de maïs en Argentine



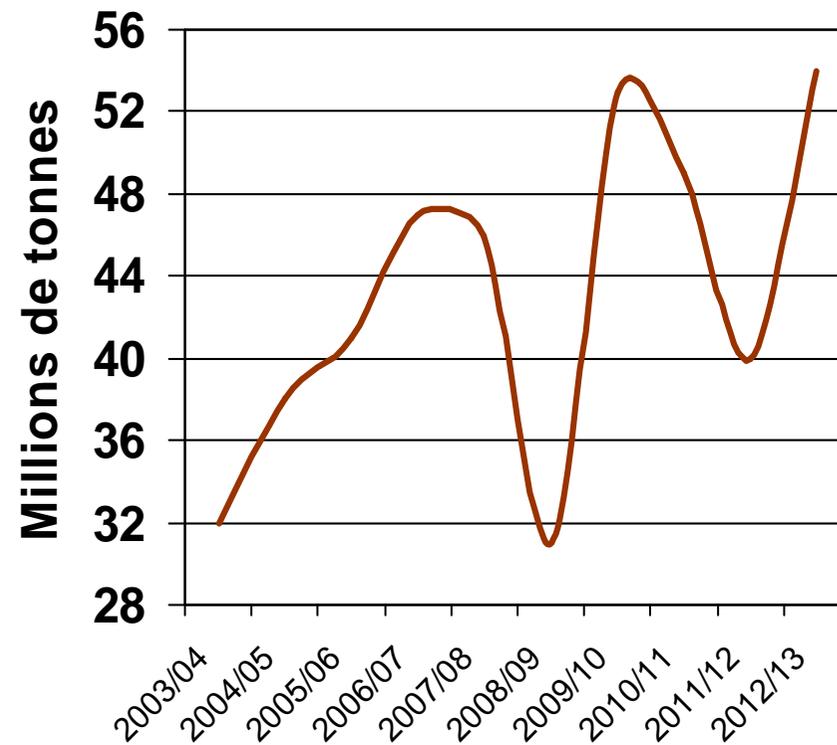
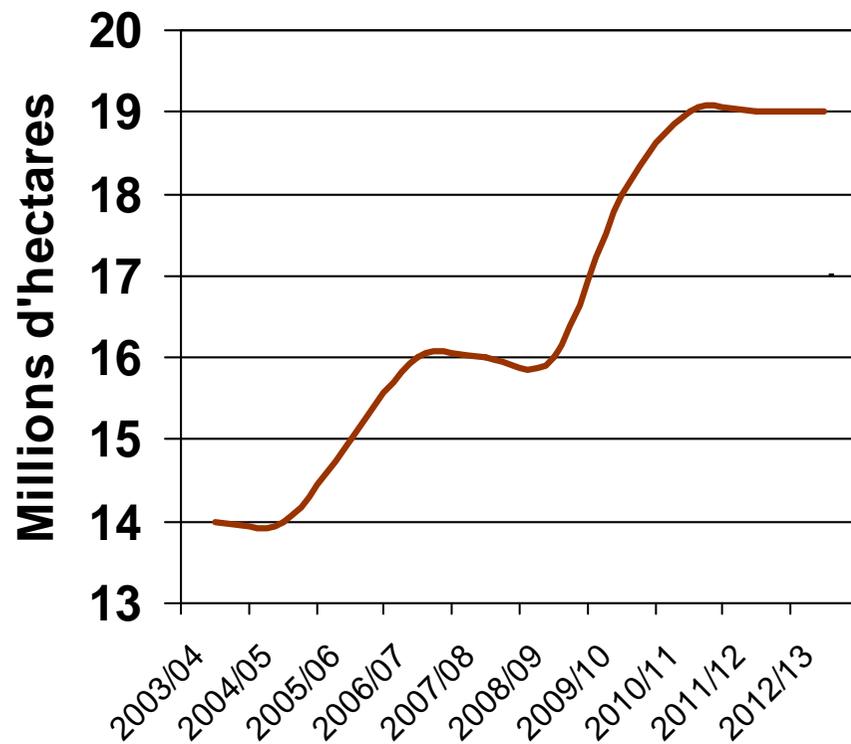
Source : CIC

Surface et production de maïs au Brésil



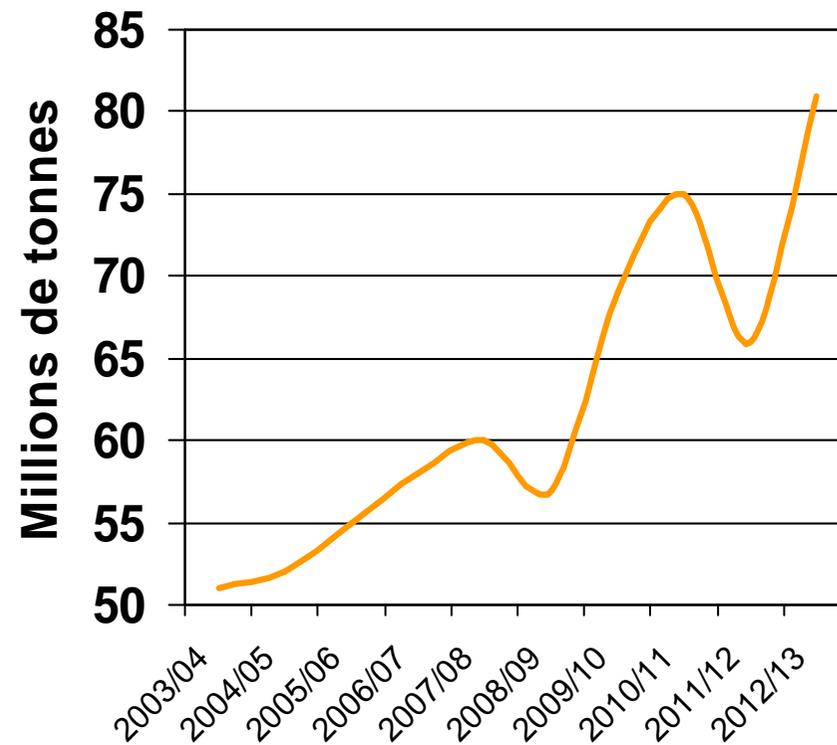
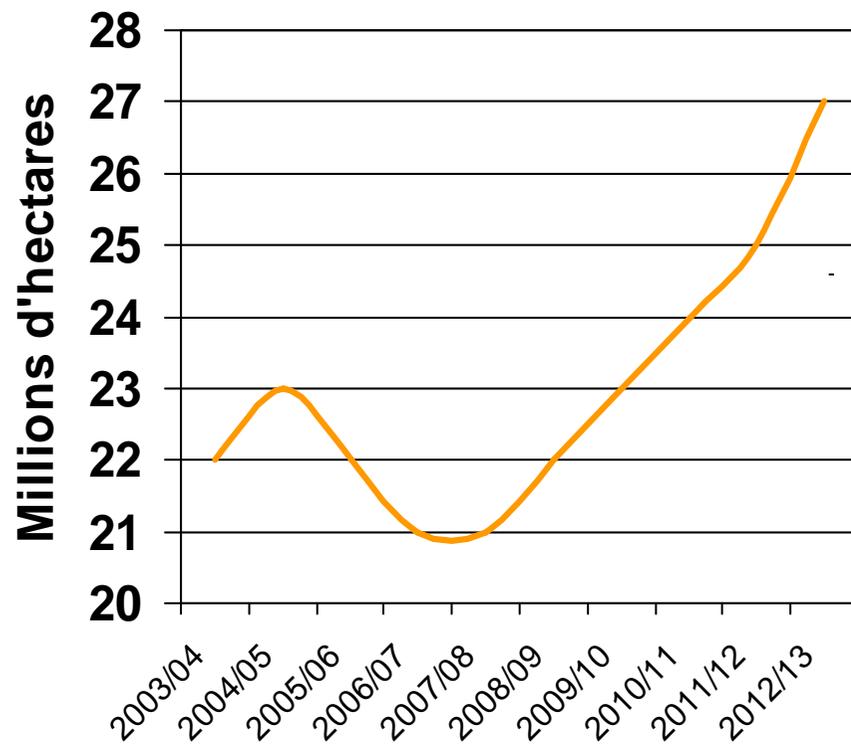
Source : CIC

Surface et production de soja en Argentine



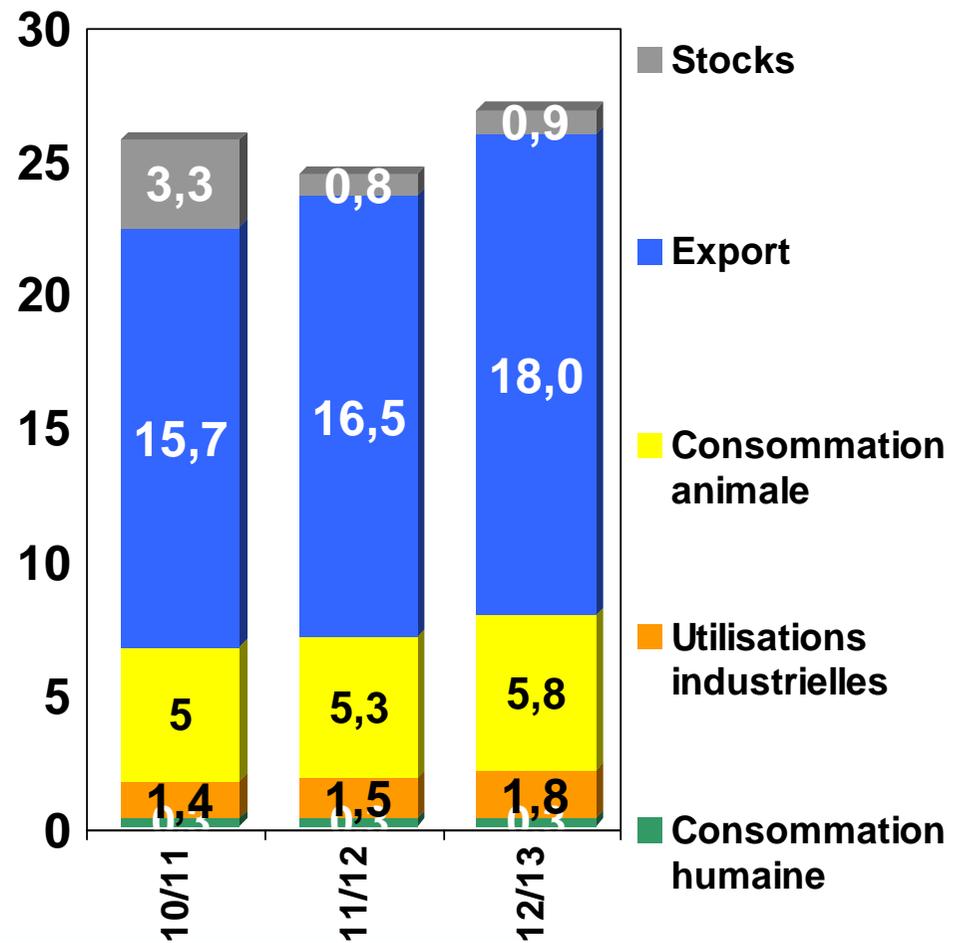
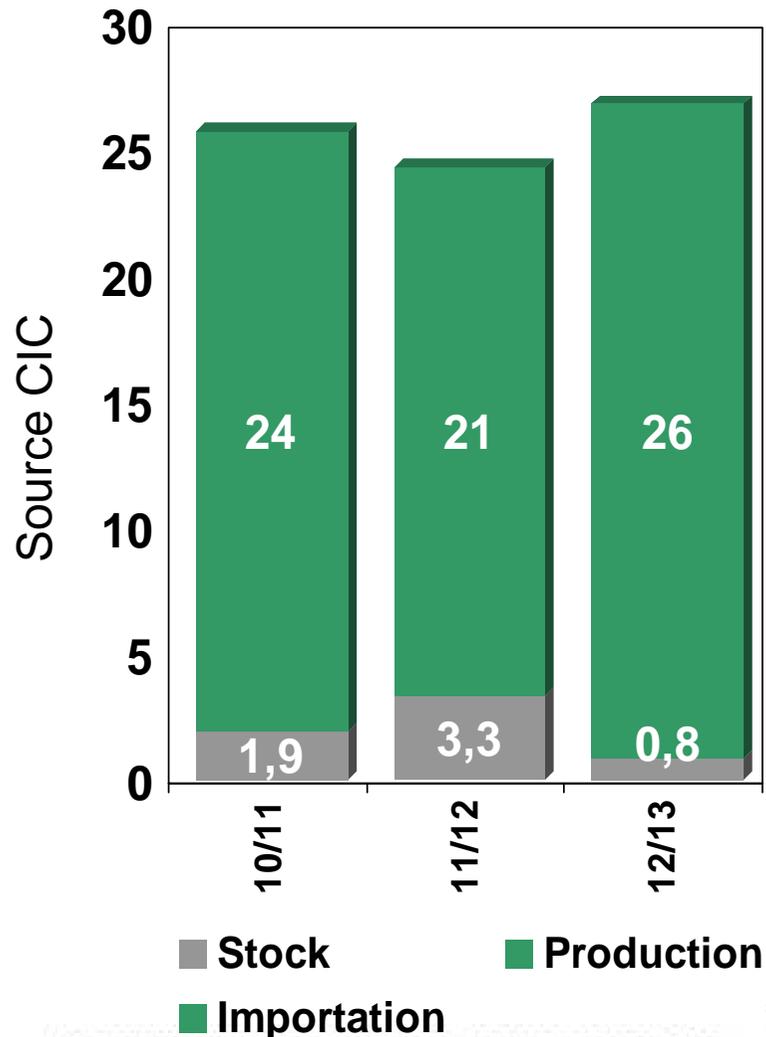
Source : CIC

Surface et production de soja au Brésil

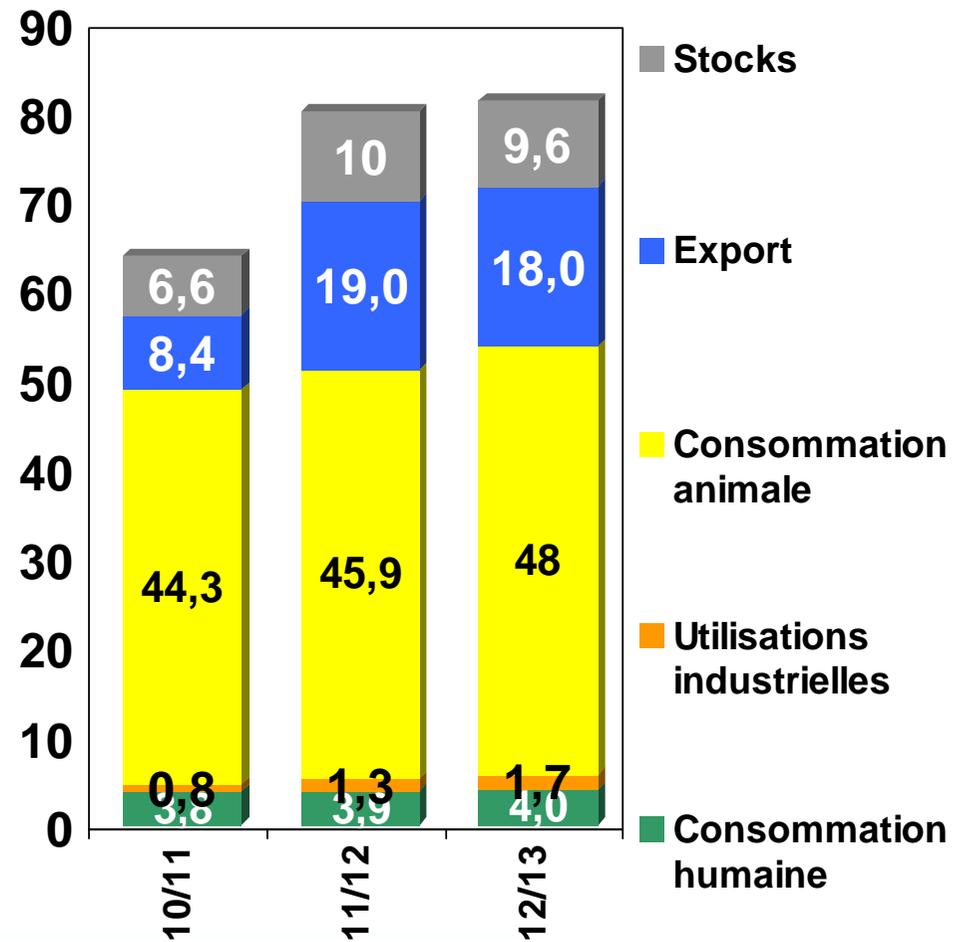
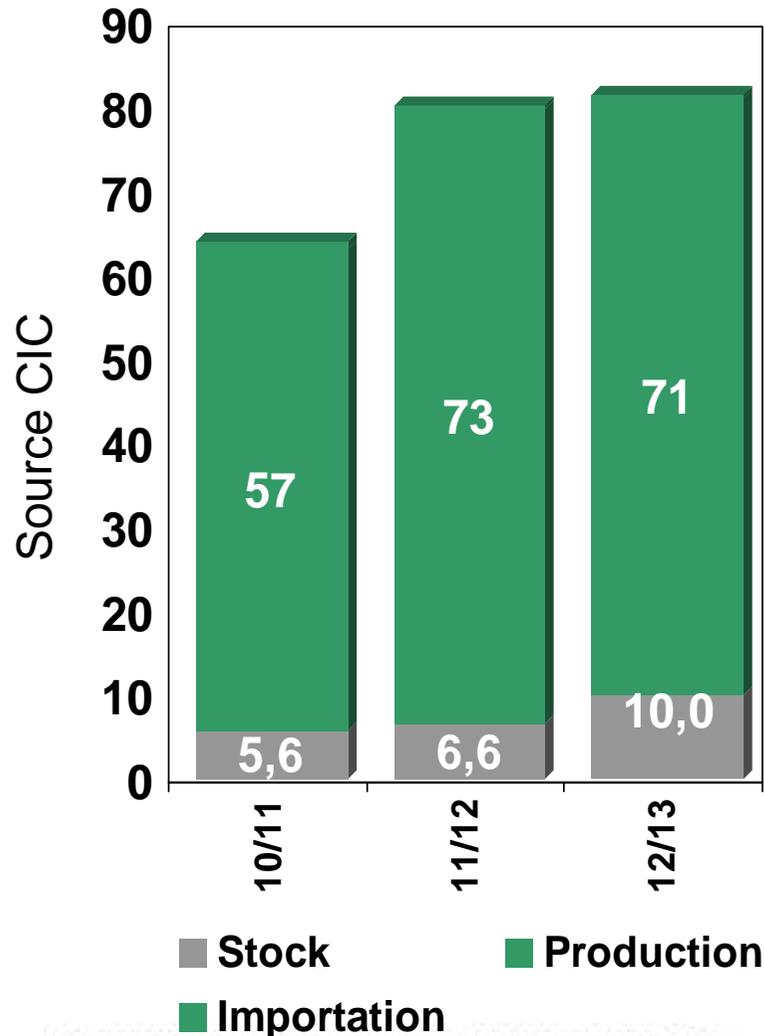


Source : CIC

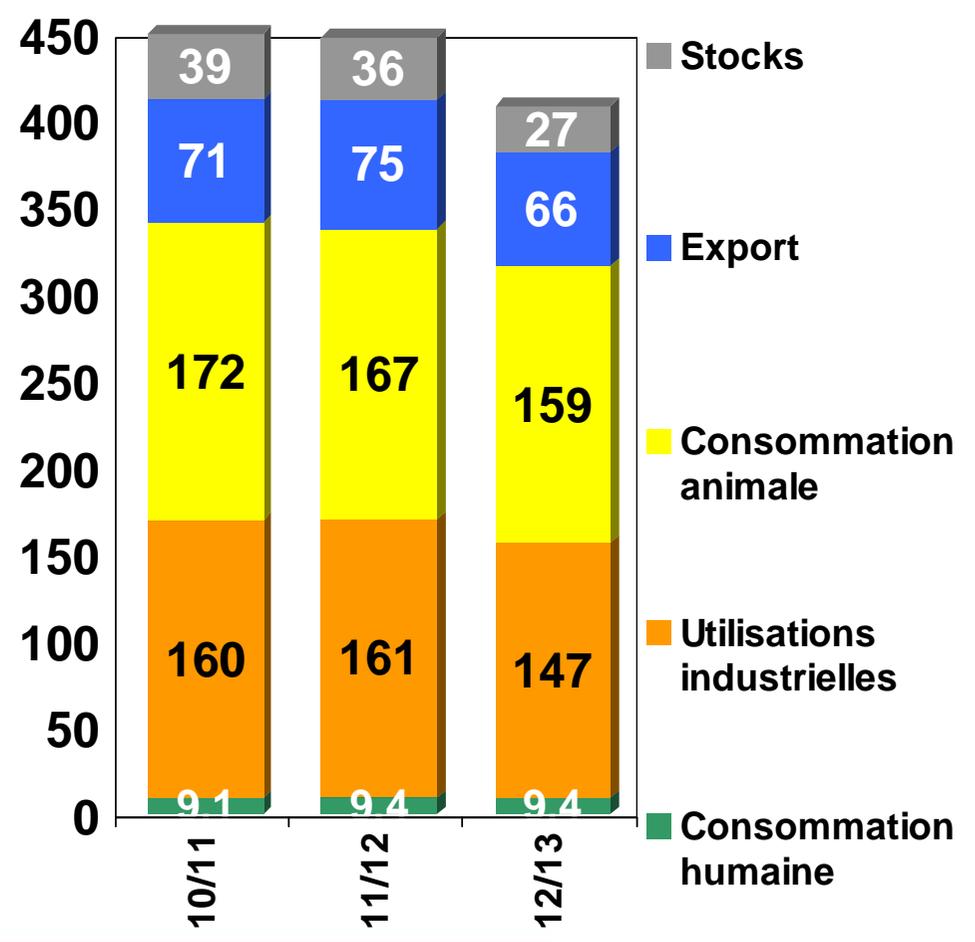
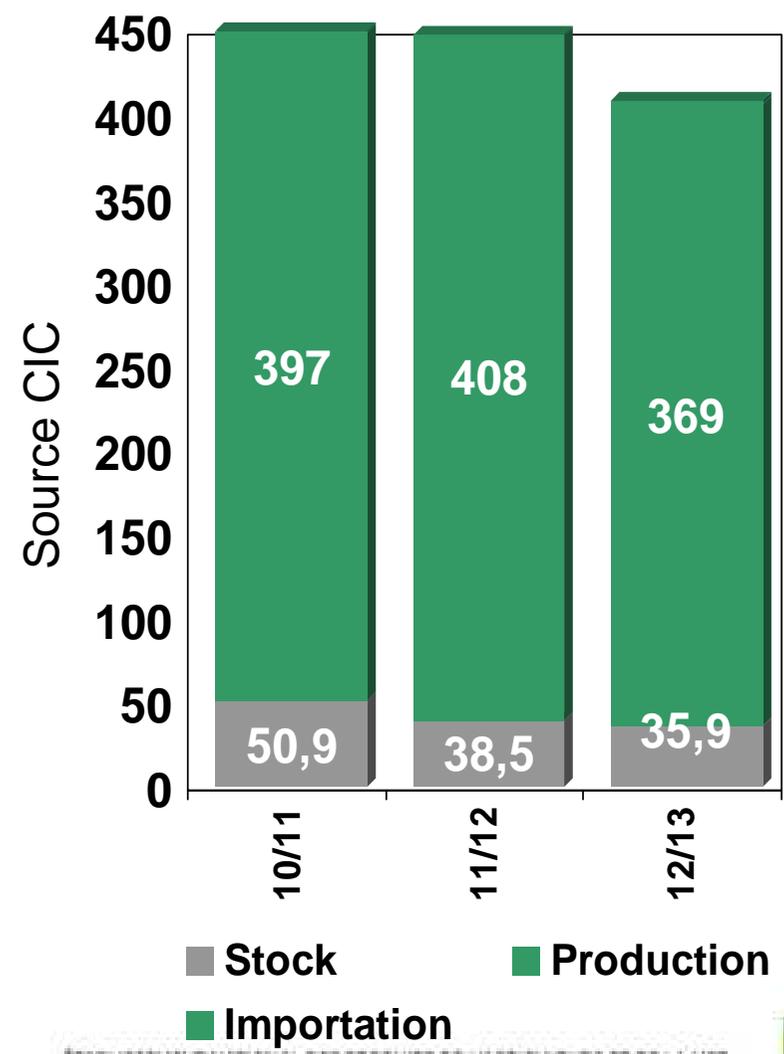
Bilan Maïs Argentine



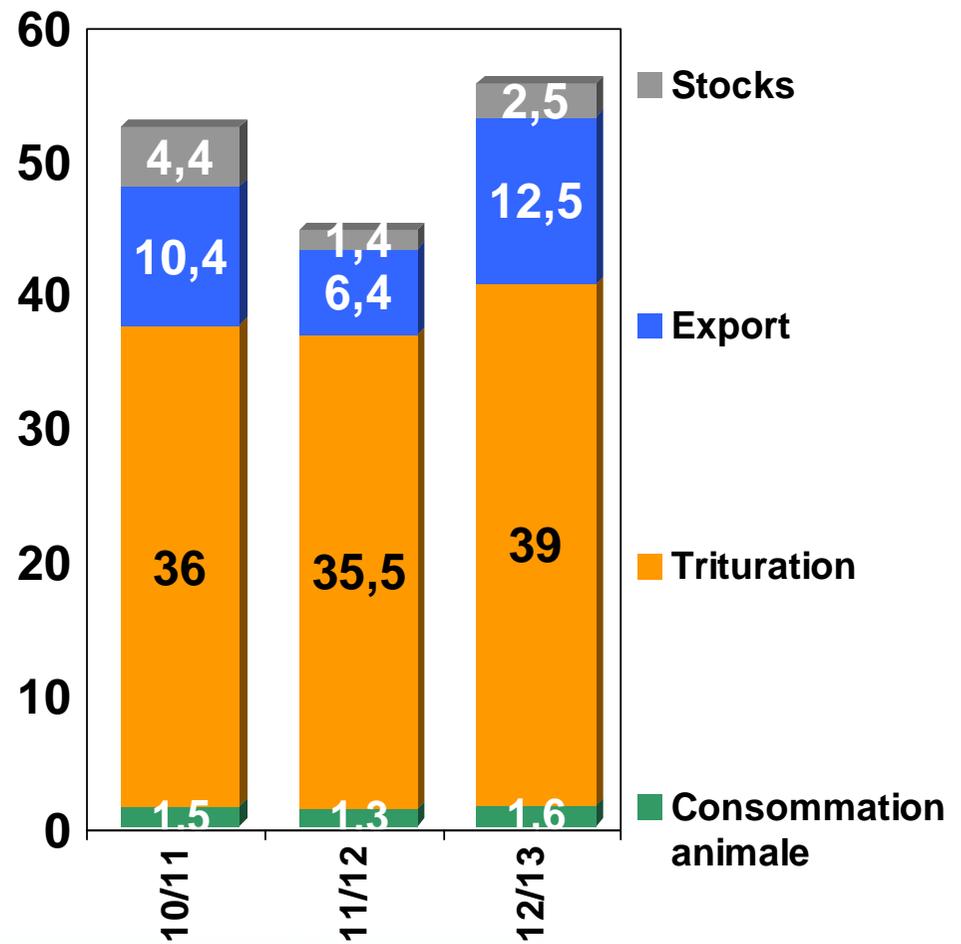
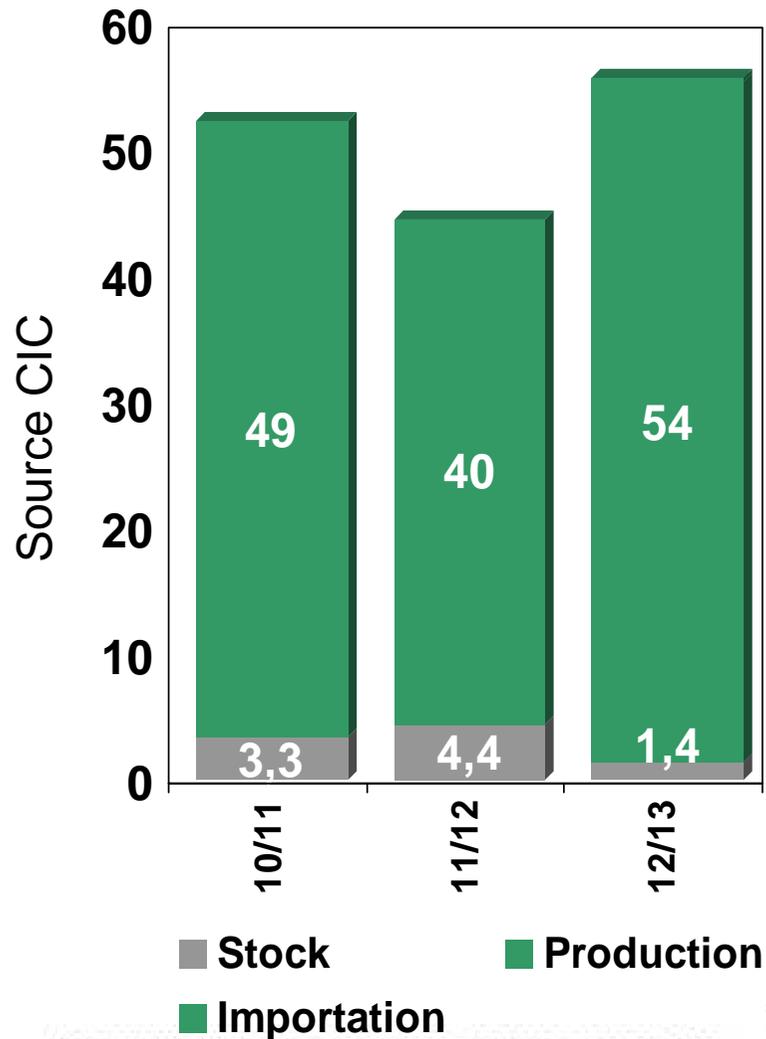
Bilan Maïs Brésil



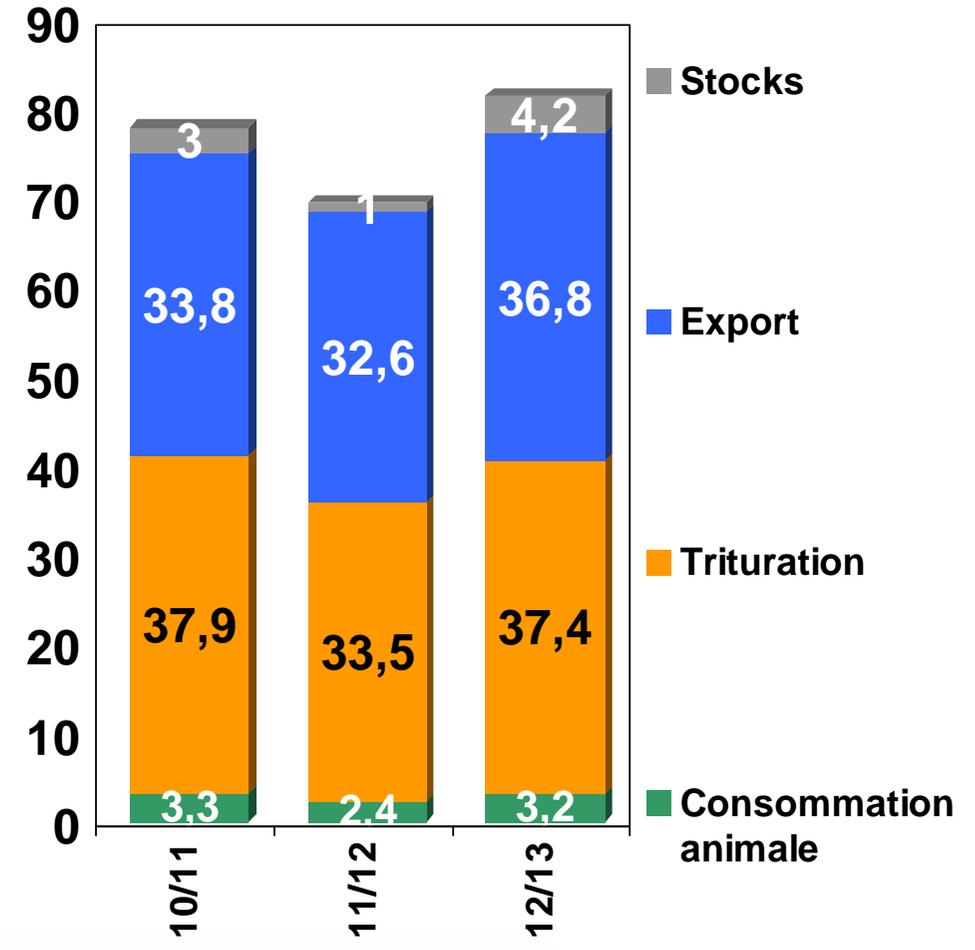
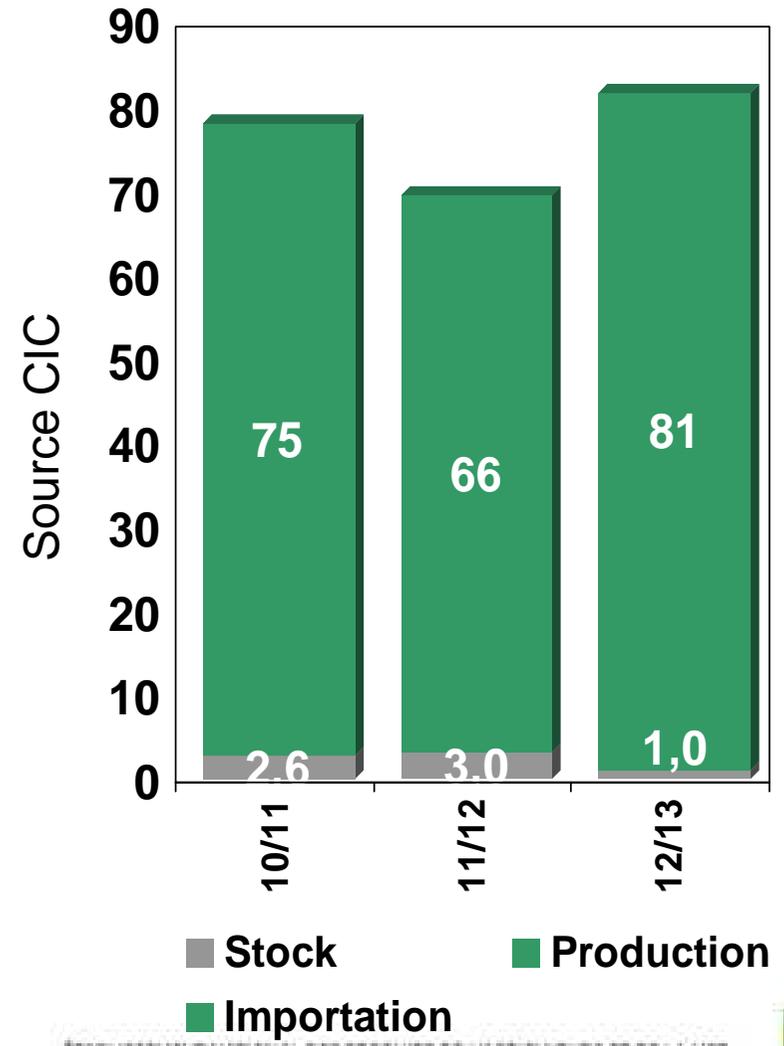
Bilan Maïs Argentine + Brésil + Etats-Unis



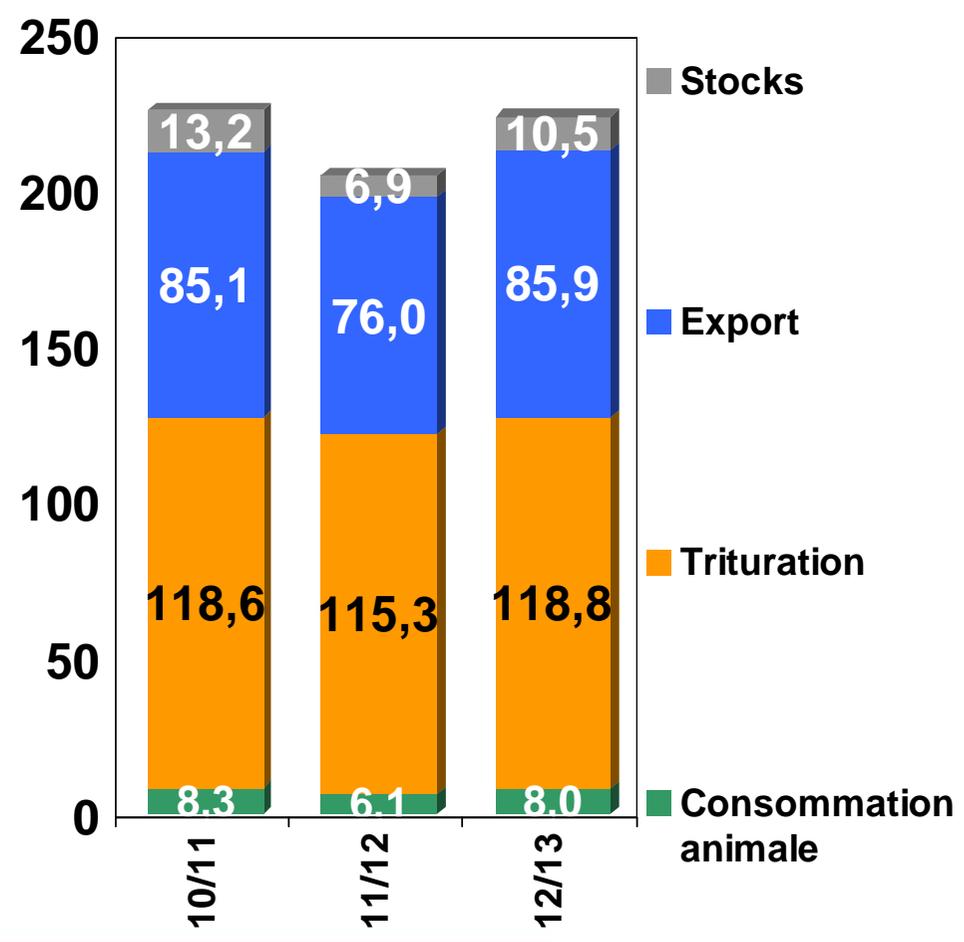
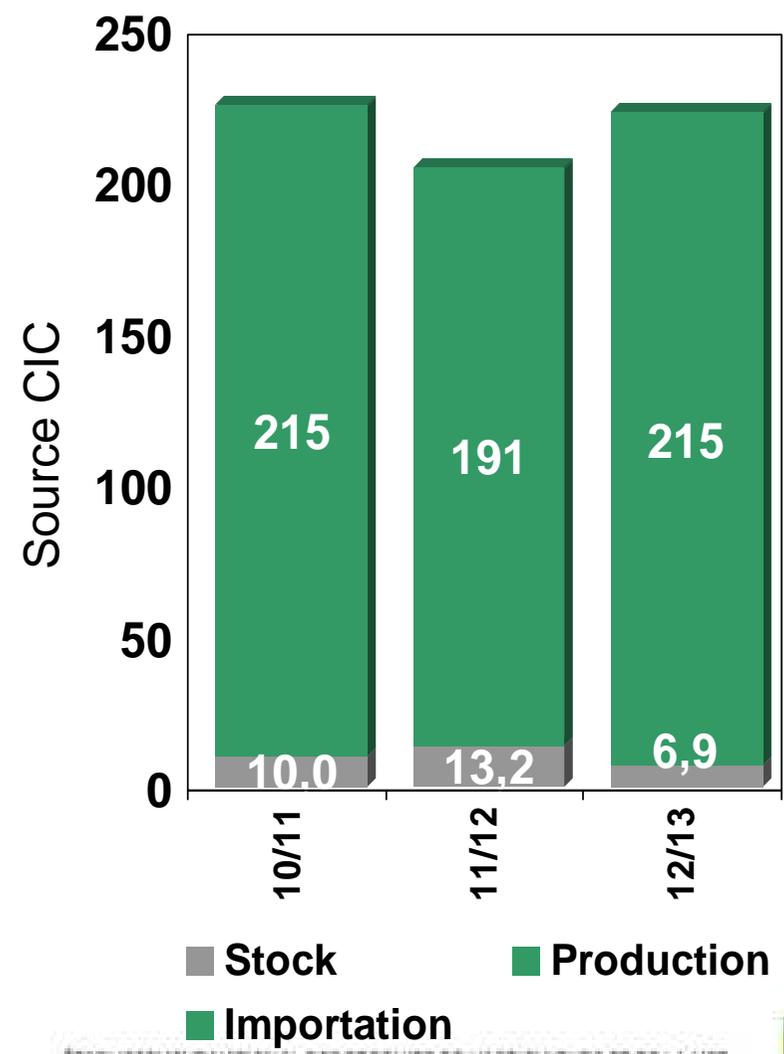
Bilan Soja Argentine



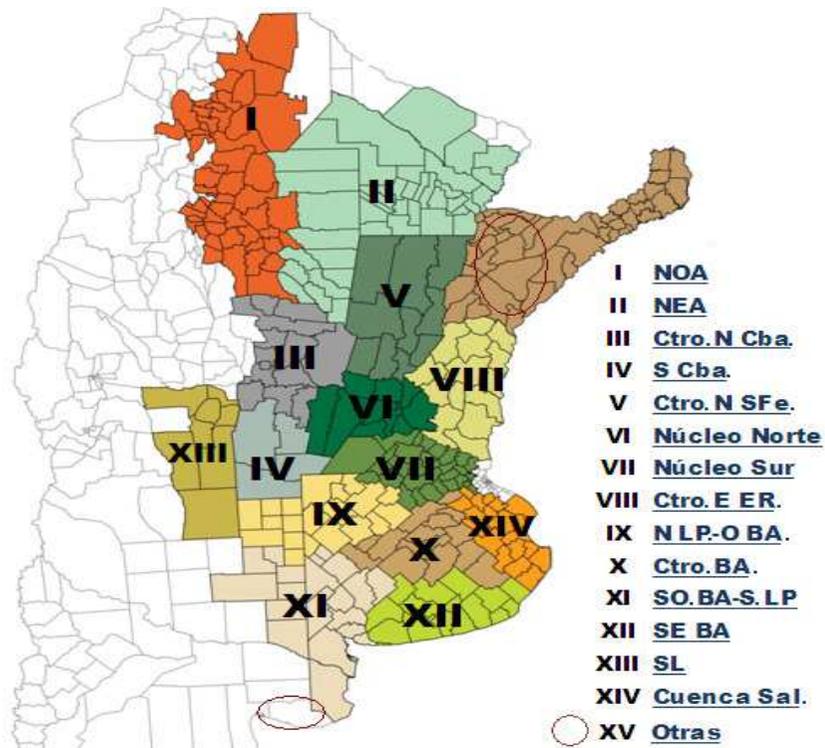
Bilan Soja Brésil



Bilan Soja Argentine + Brésil + Etats-Unis



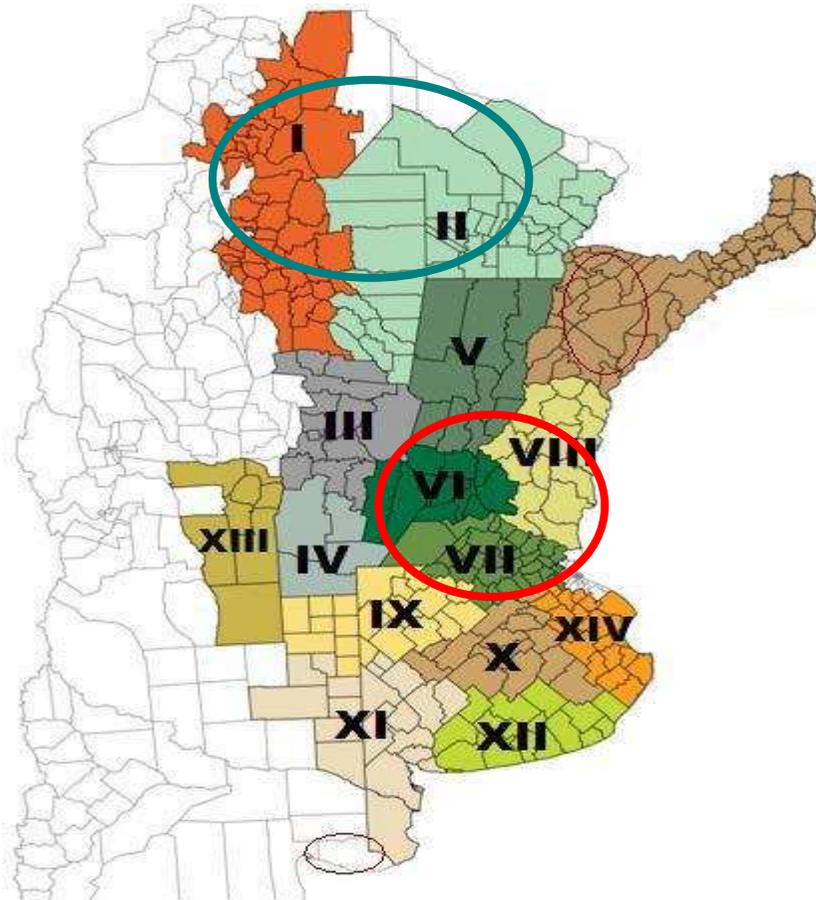
Argentine : les régions agricoles – campagne 2012/13



Régions :
 NOA: Salta+Tucumán+Jujuy+Catamarca+Oeste Sgo del Estero.
 NEA: Chaco+Este Sgo del Estero+Formosa.
 Ctro N Sfe: Centro-Norte de Santa Fe. Ctro N Cba: Centro-Norte de Córdoba.
 Núcleo Norte: Este de Córdoba+Centro-Sur de Santa Fe+Sudoeste de Entre Ríos.
 S Cba: Sur de Córdoba. N LP-O BA: Norte de La Pampa+ Oeste de Buenos Aires.
 Ctro E ER: Entre Ríos excluido Victoria y Diamante.
 Ctro BA: Centro de Buenos Aires.
 SO BA-S LP: Sudoeste de Buenos Aires+Sur de La Pampa.
 SE BA: Sudeste de Buenos Aires. SL: San Luis.
 Cuenca Sal: Este de la Cuenca del Salado. Otras: Corrientes+Misiones.

Source : Bolsa de cereales

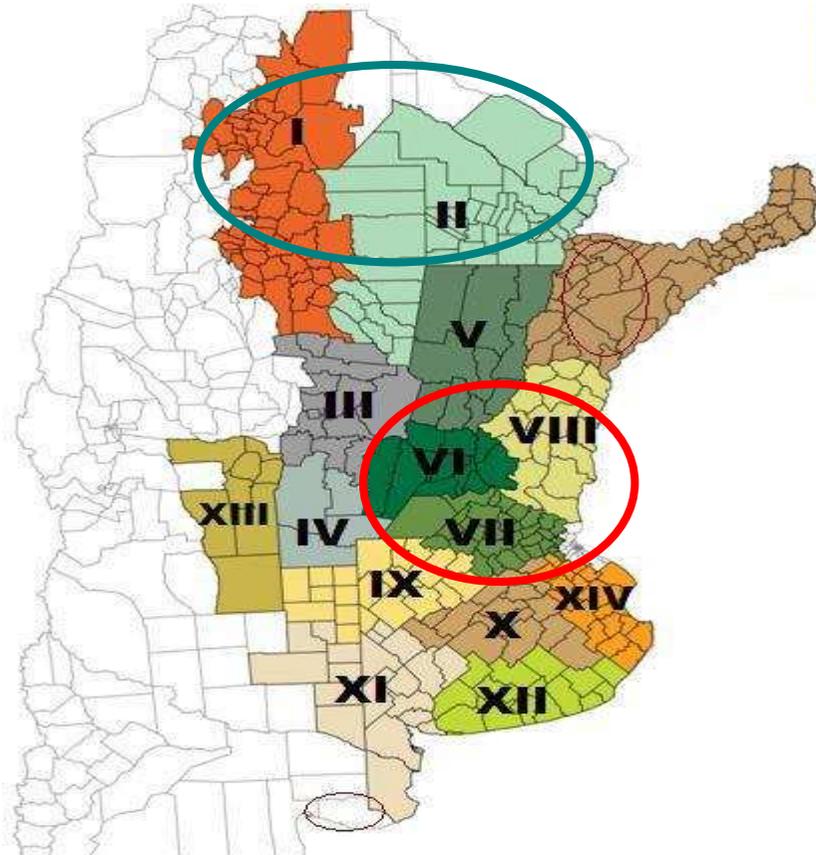
Argentine : semis de soja – campagne 2012/13



Régions		Avancée des semis (%)
I	NOA	0,2
II	NEA	0,5
III	Ctro N Cba	26,4
IV	S Cba	56,0
V	Ctro N SFe	43,5
VI	Núcleo Norte	78,1
VII	Núcleo Sur	63,8
VIII	Ctro E ER	69,7
IX	N LP-OBA	38,8
X	Ctro BA	41,3
XI	SO BA-S LP	35,0
XII	SE BA	50,4
XIII	SL	53,2
XIV	Cuenca Sal.	40,5
XV	Otras	49,0
TOTAL		45,2

Source : Bolsa de cereales

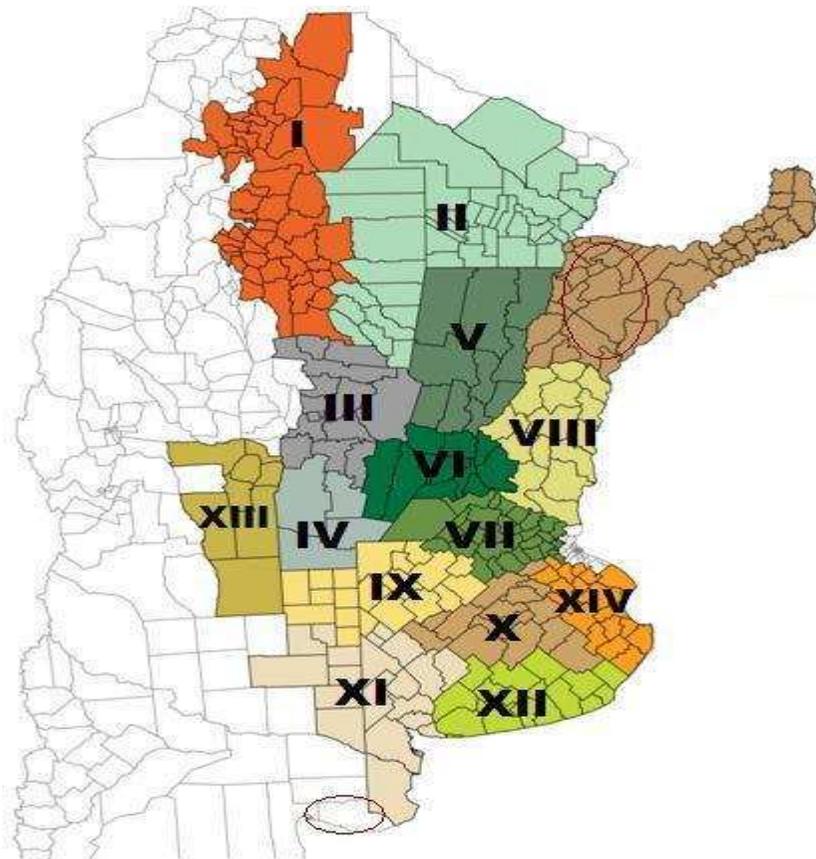
Argentine : semis de maïs – campagne 2012/13



Régions		Avancée des semis (%)
I	NOA	4,3
II	NEA	6,5
III	Ctro N Cba	24,0
IV	S Cba	61,0
V	Ctro N SFe	60,0
VI	Núcleo Norte	82,3
VII	Núcleo Sur	73,6
VIII	Ctro E ER	66,5
IX	N LP-OBA	47,7
X	Ctro BA	82,0
XI	SO BA-S LP	72,5
XII	SE BA	82,0
XIII	SL	66,2
XIV	Cuenca Sal	86,1
XV	Otras	10,0
TOTAL		52,4

Source : Bolsa de cereales

Argentine : Récolte du blé – campagne 2012/13



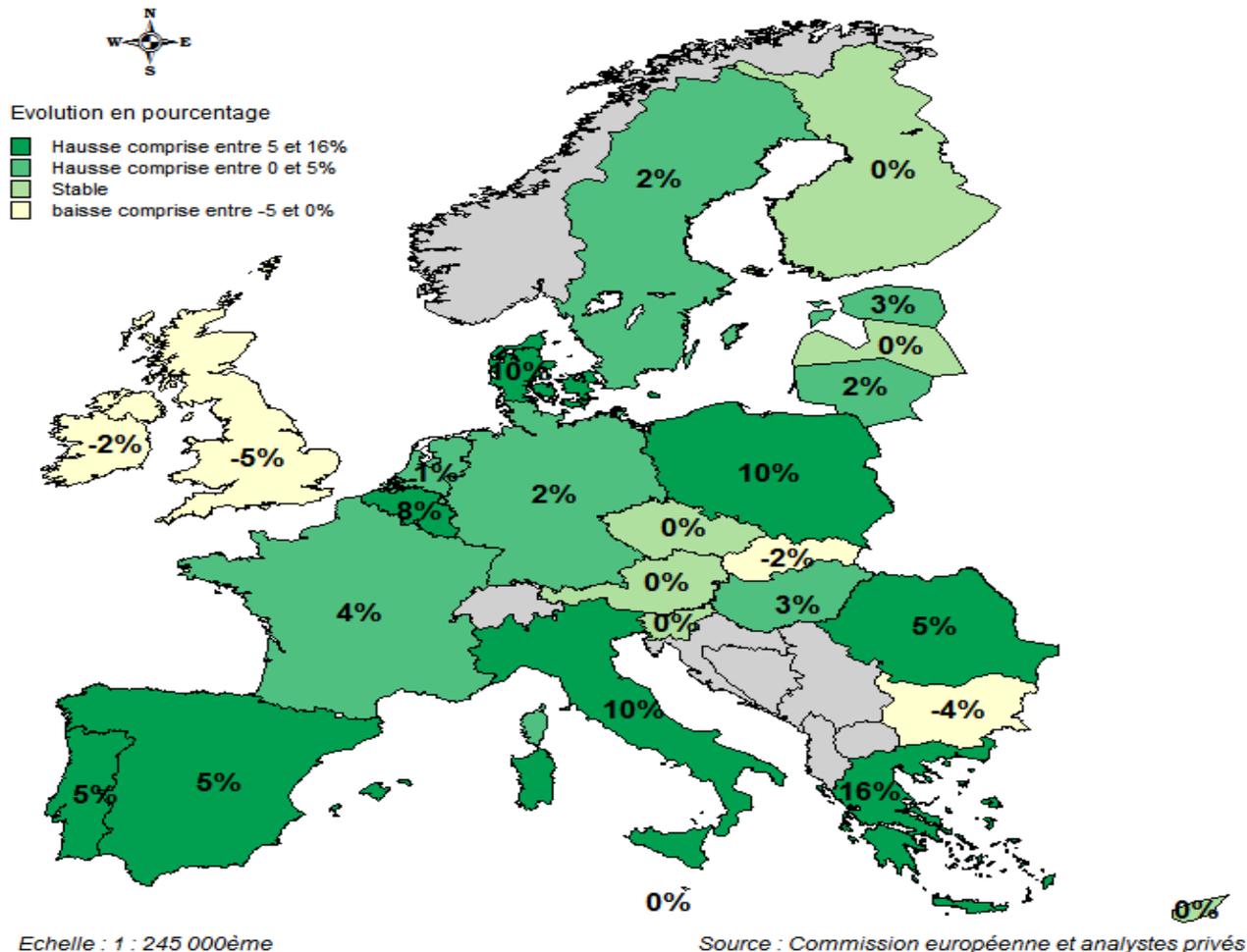
Région		Avancée de la récolte (%)
I	NOA	100,0
II	NEA	100,0
III	Ctro N Cba	50,0
IV	S Cba	0,0
V	Ctro N SFe	85,0
VI	Núcleo Norte	35,0
VII	Núcleo Sur	6,0
VIII	Ctro E ER	43,0
IX	N LP-OBA	0,0
X	Ctro BA	0,0
XI	SO BA-S LP	0,0
XII	SE BA	0,0
XIII	SL	0,0
XIV	Cuenca Sal.	0,0
XV	Otras	0,0
TOTAL		25,7

Source : Bolsa de cereales

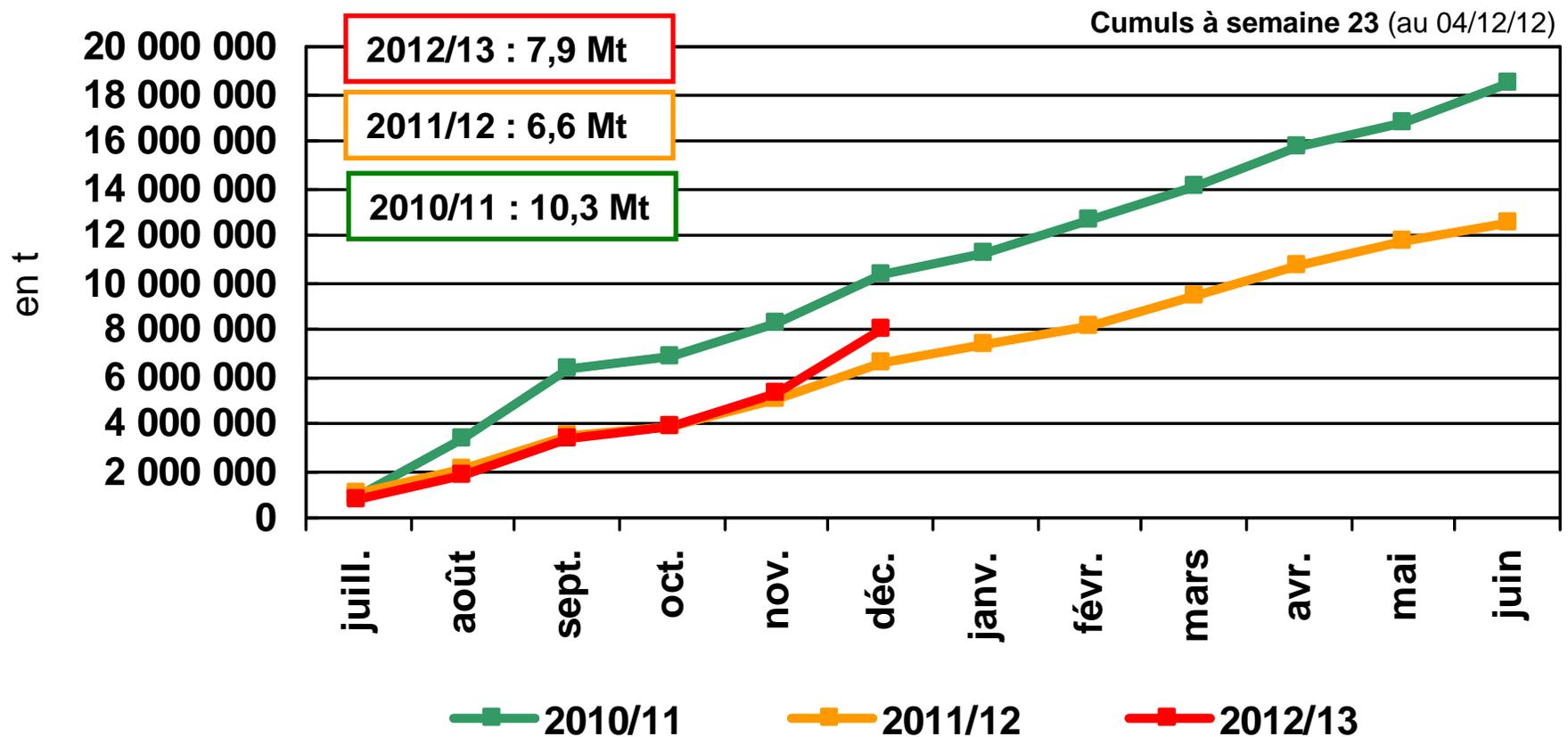


Marché européen

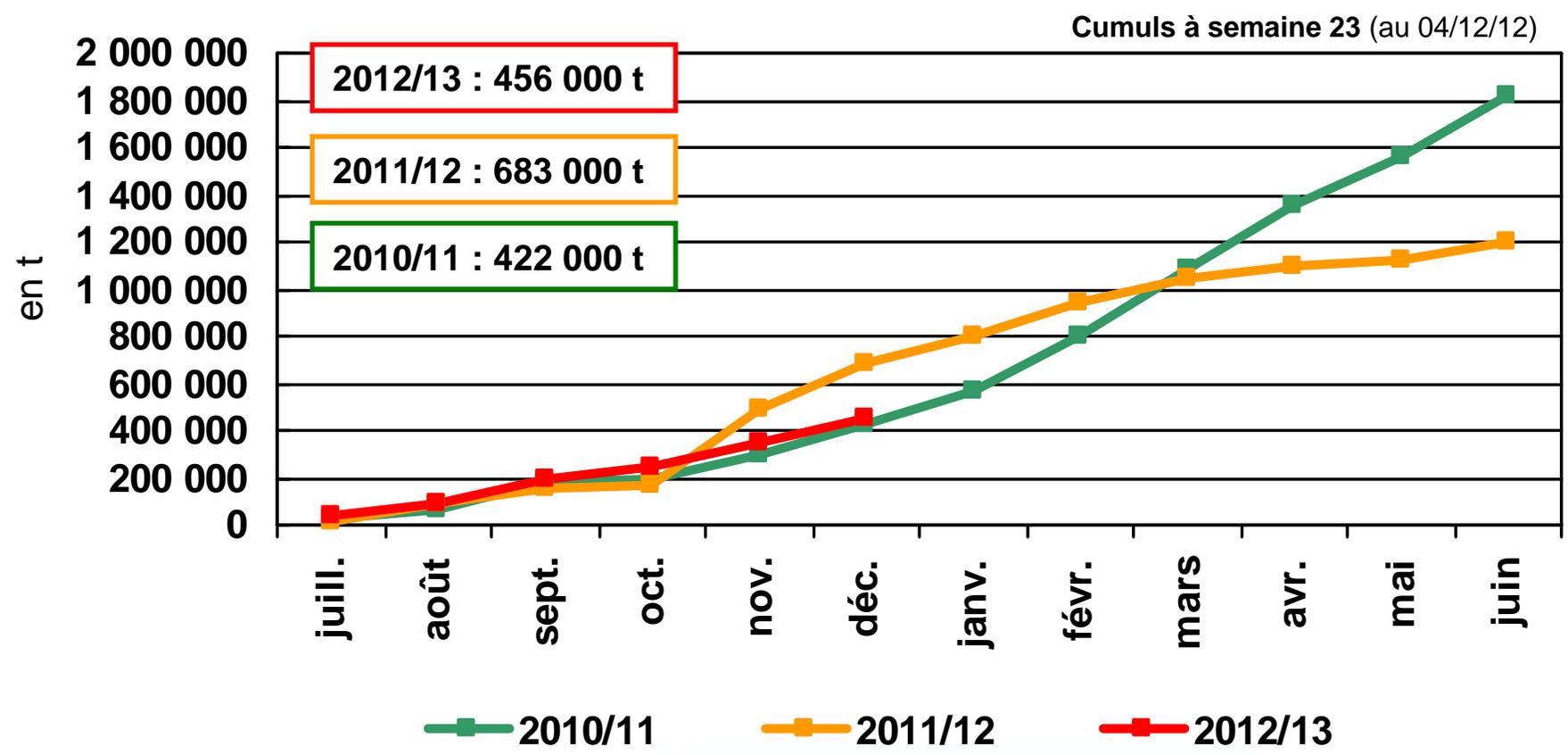
Estimations d'ensemencements de blé tendre : récolte 2013 par rapport à la récolte 2012



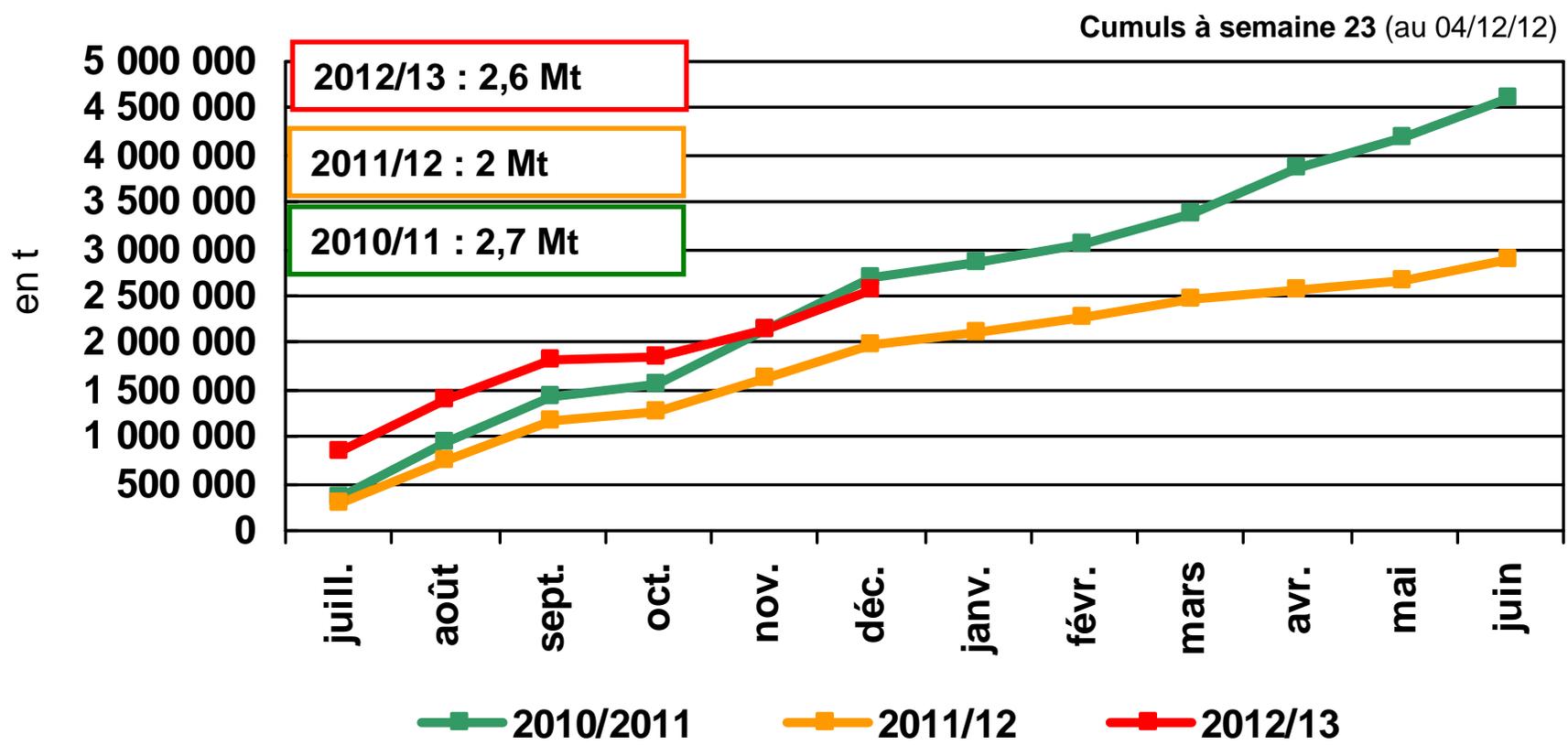
Blé tendre : certificats à l'exportation délivrés dans l'UE



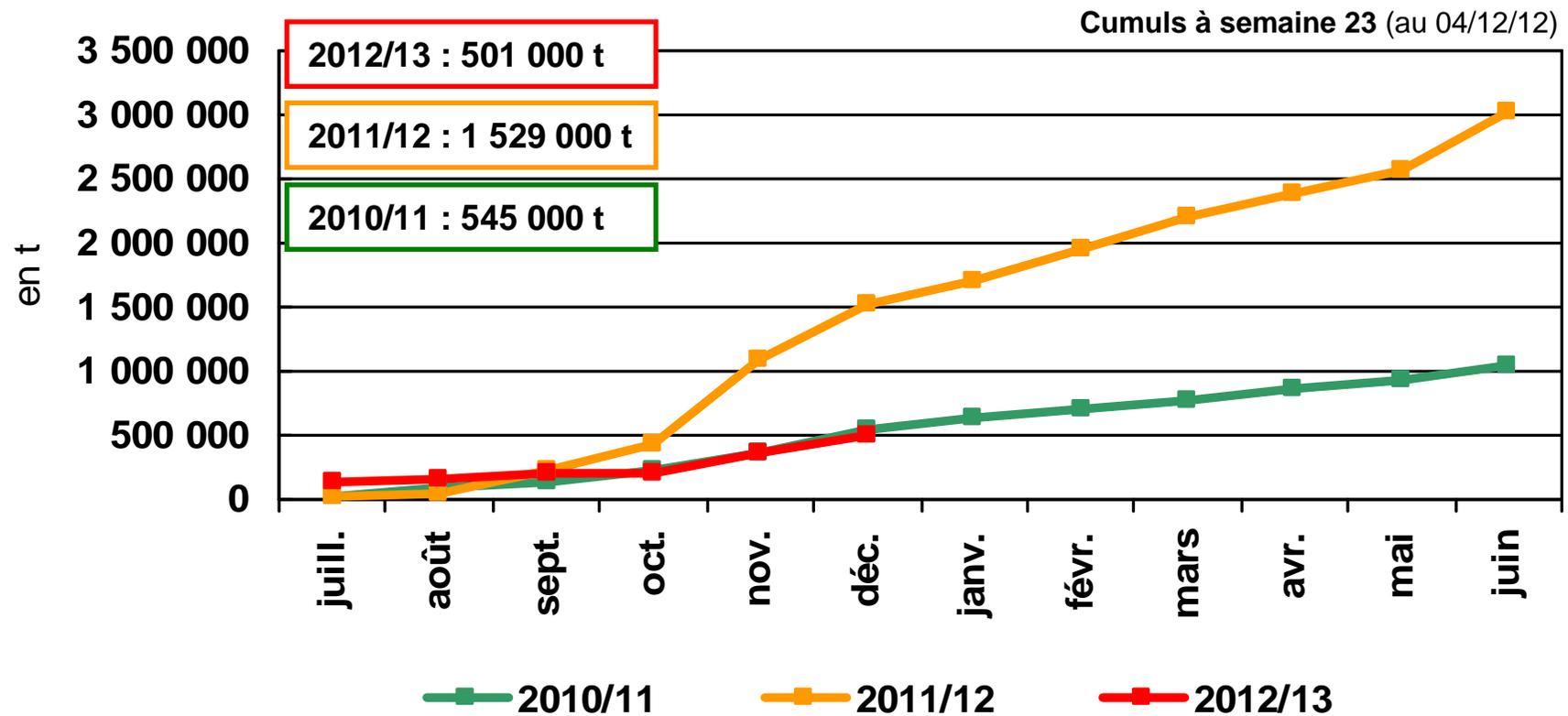
Blé dur : certificats à l'exportation délivrés dans l'UE



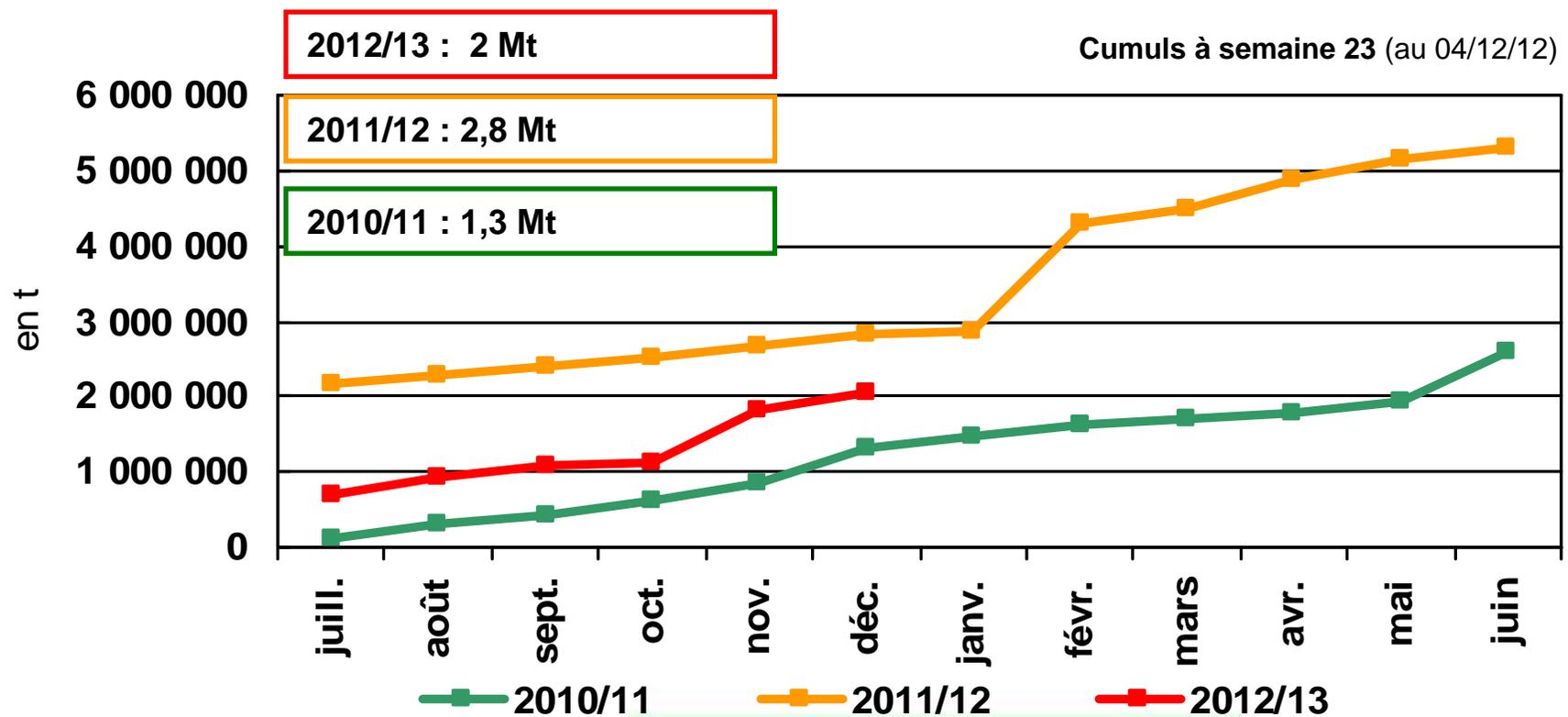
Orge : certificats à l'exportation délivrés dans l'UE



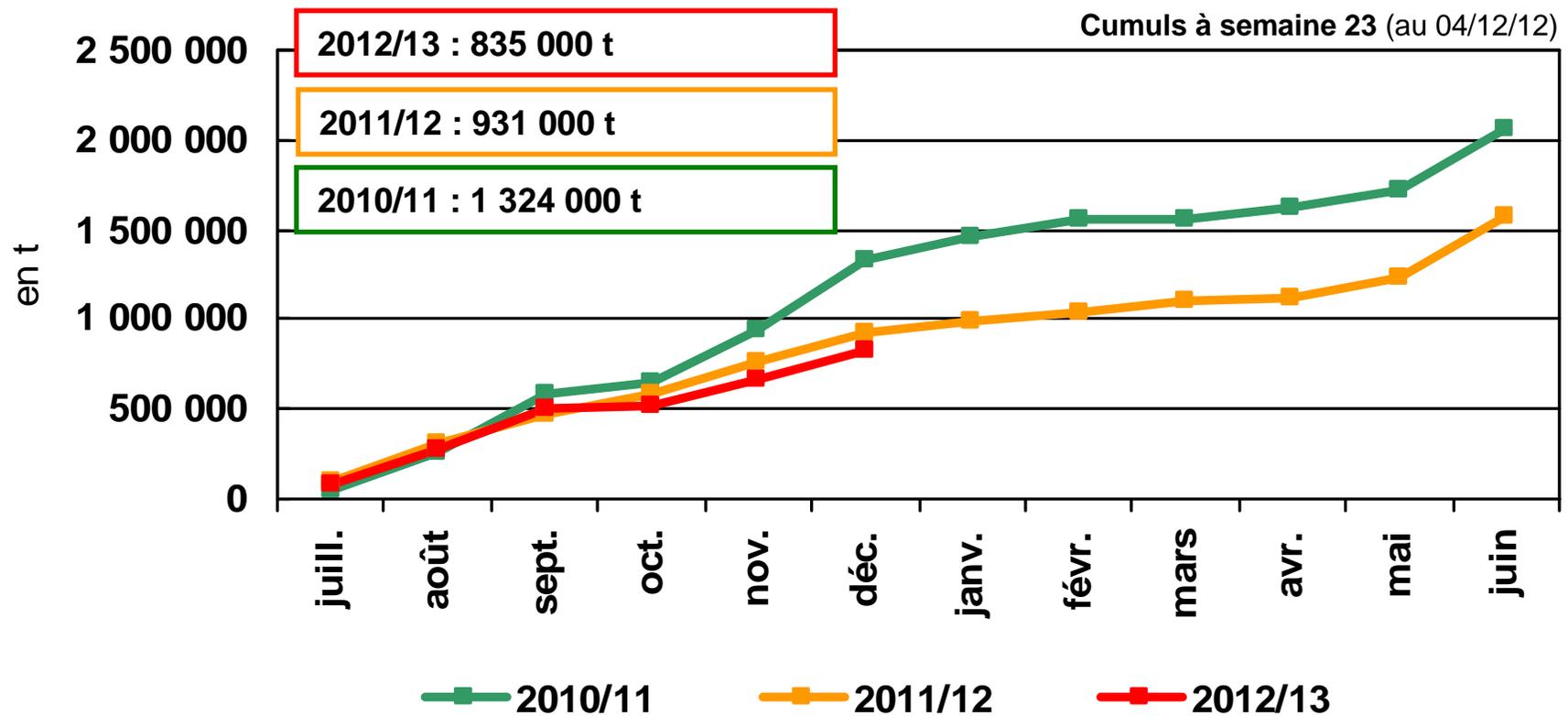
Maïs : certificats à l'exportation délivrés dans l'UE

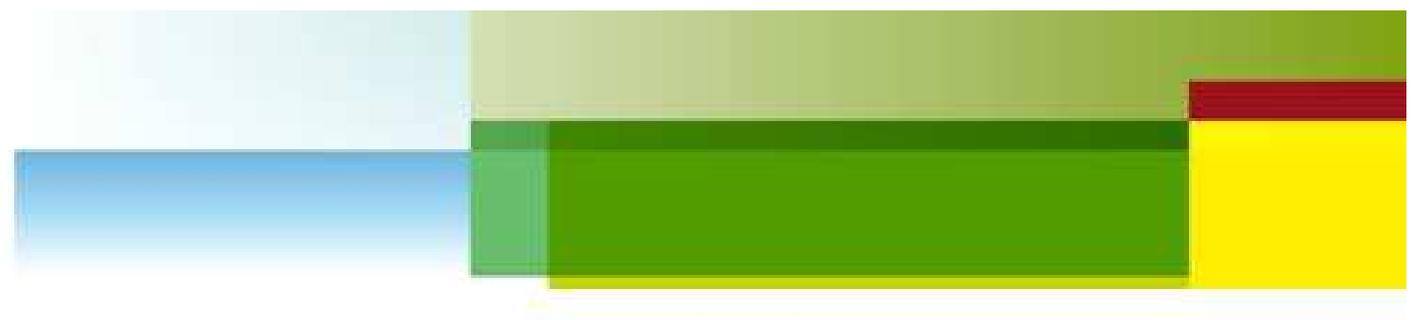


Blé tendre : certificats à l'importation délivrés dans l'UE

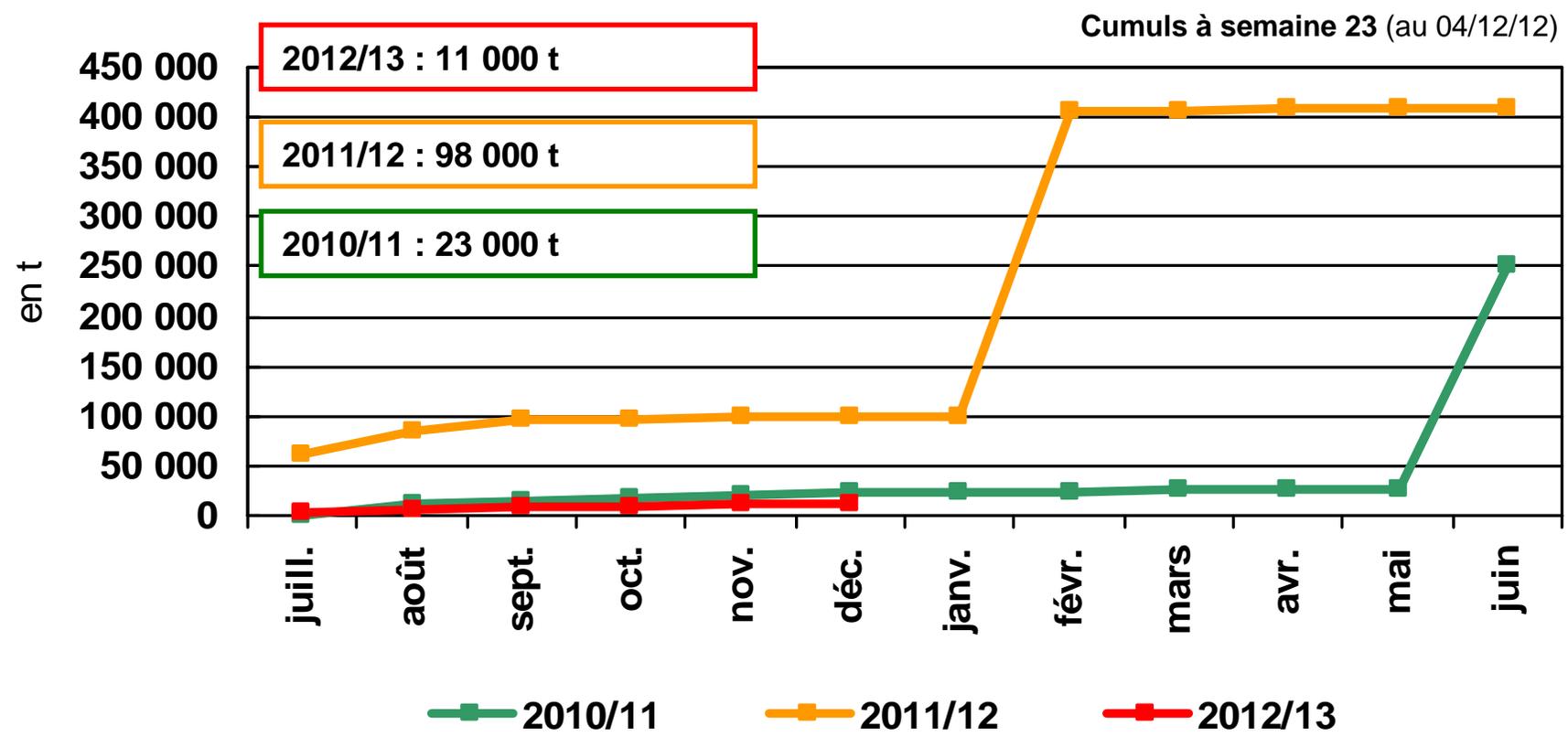


Blé dur : certificats à l'importation délivrés dans l'UE

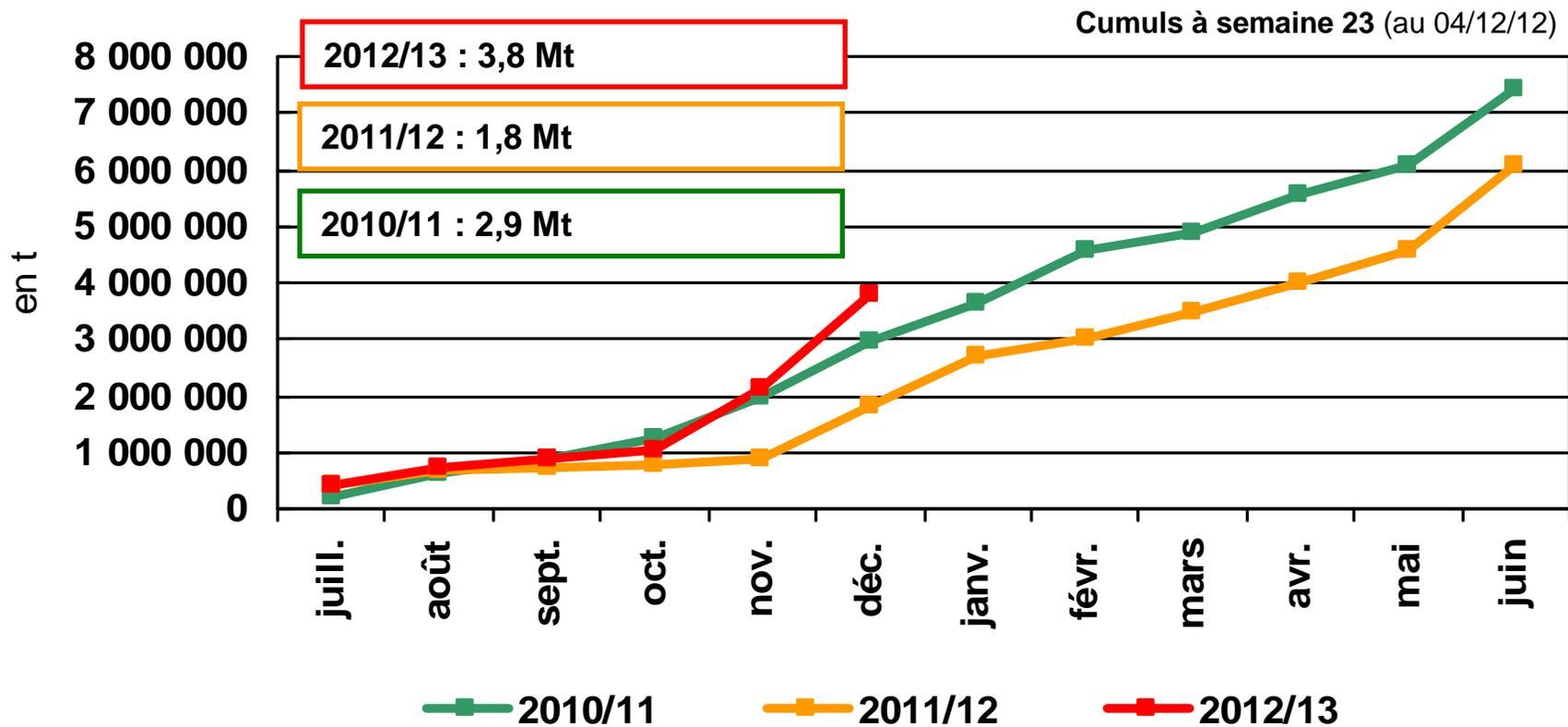




Orge : certificats à l'importation délivrés dans l'UE

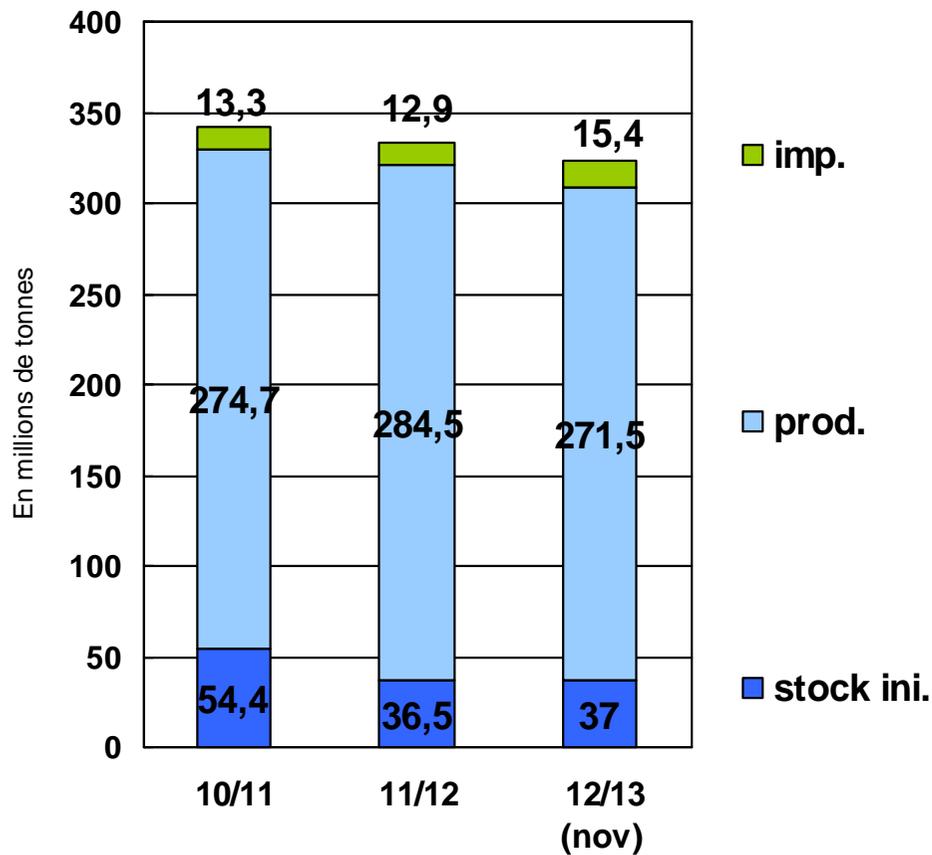


Maïs : certificats à l'importation délivrés dans l'UE

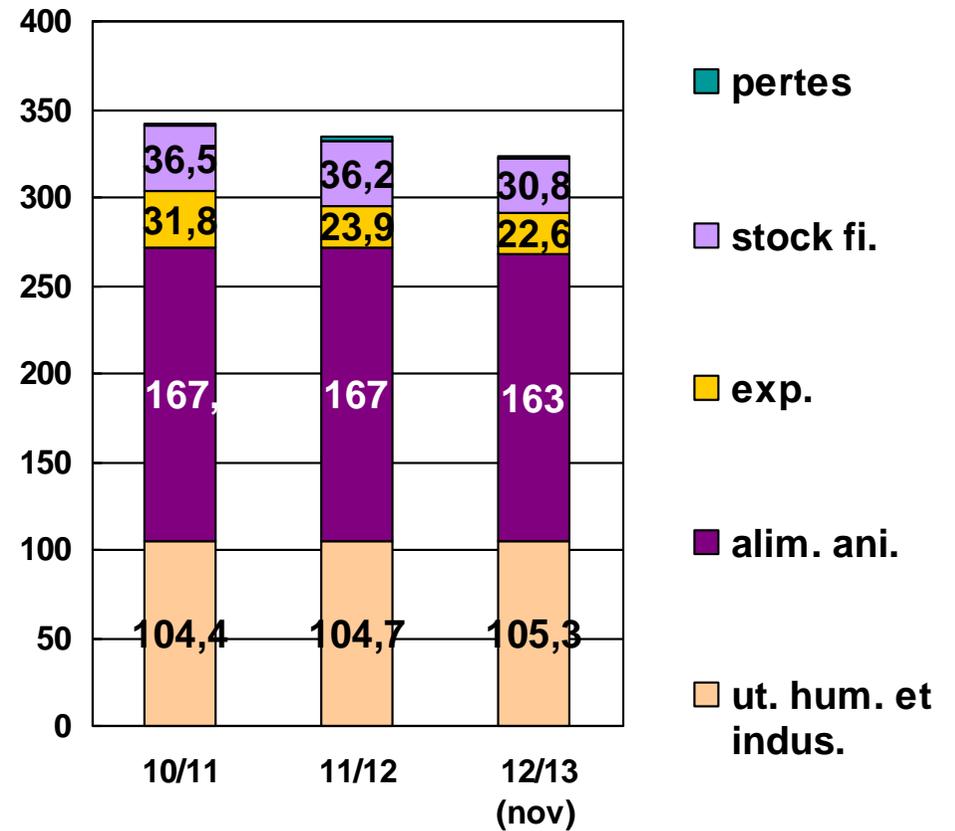


UE - bilan toutes céréales

Total dispo 2012/13 : 324 Mt

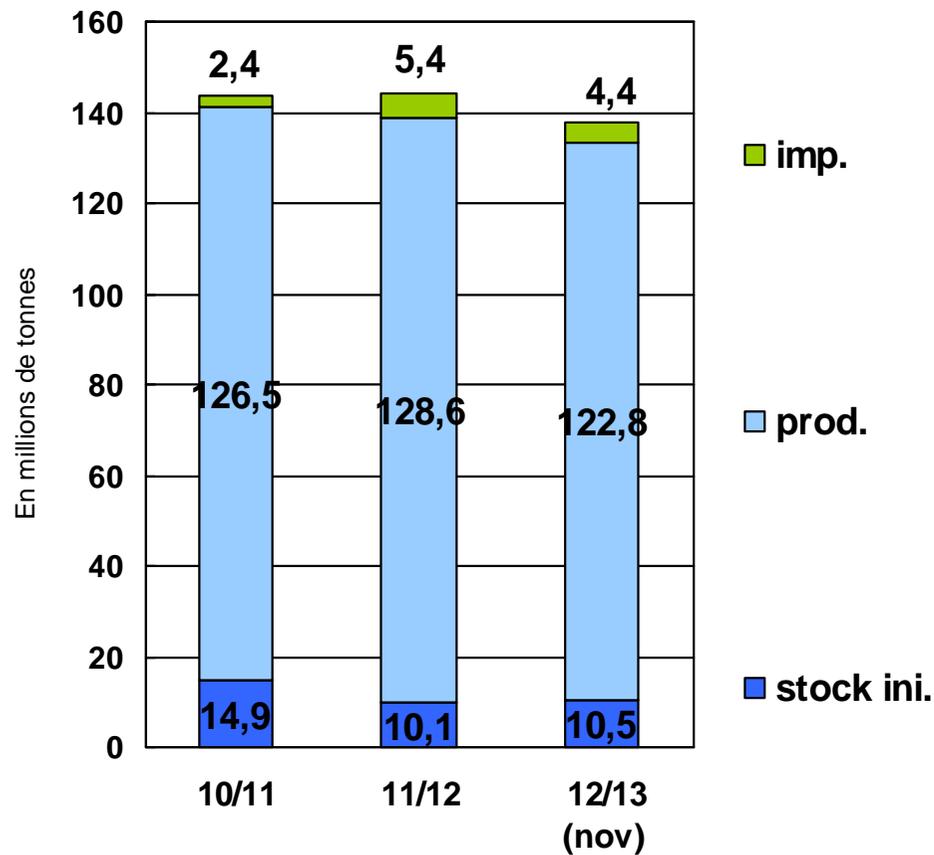


Total utilisation 2012/13 : 324 Mt

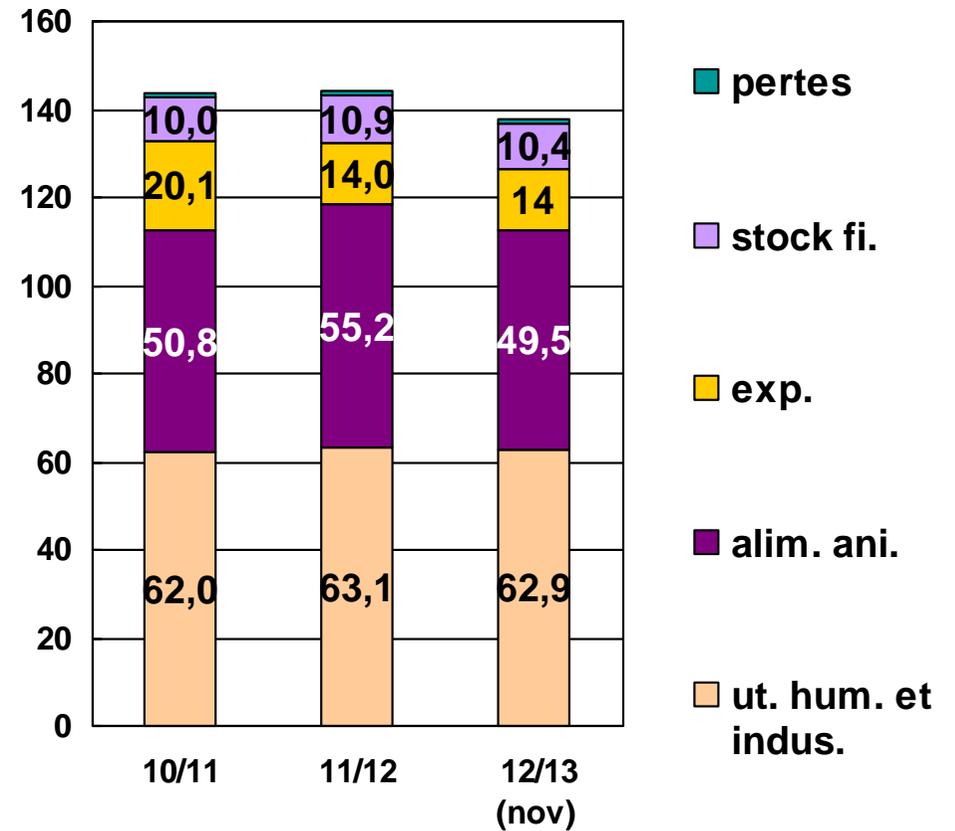


UE - bilan blé tendre

Total dispo 2012/13 : 137,8 Mt

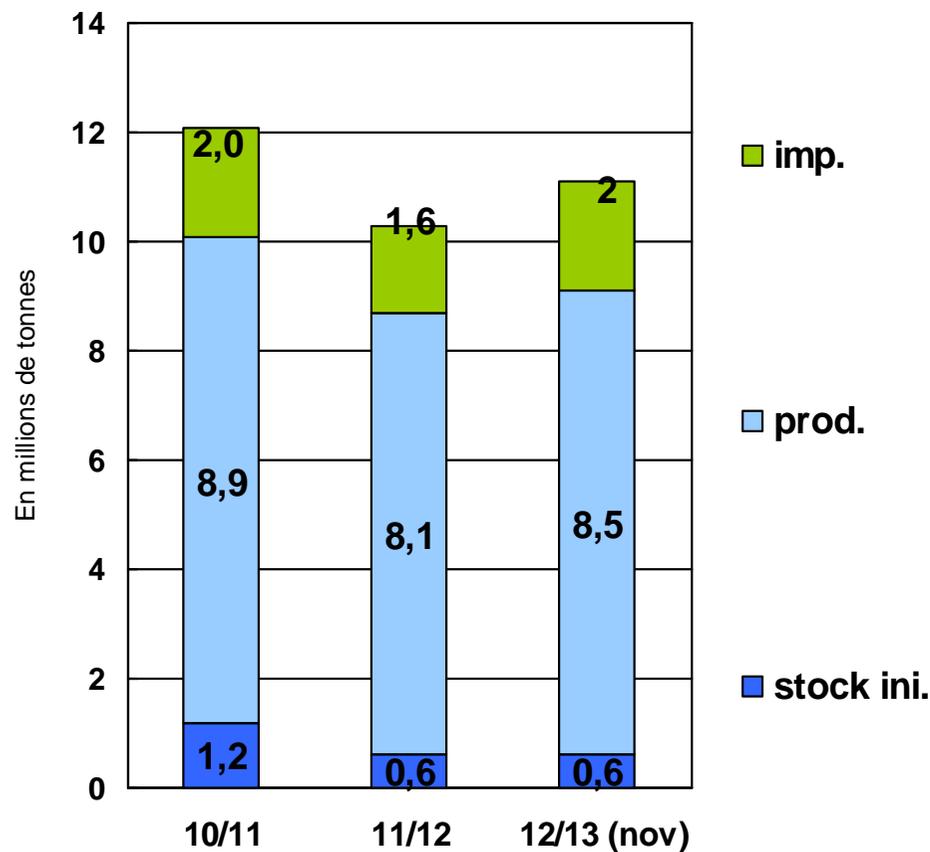


Total utilisation 2012/13 : 137,8 Mt

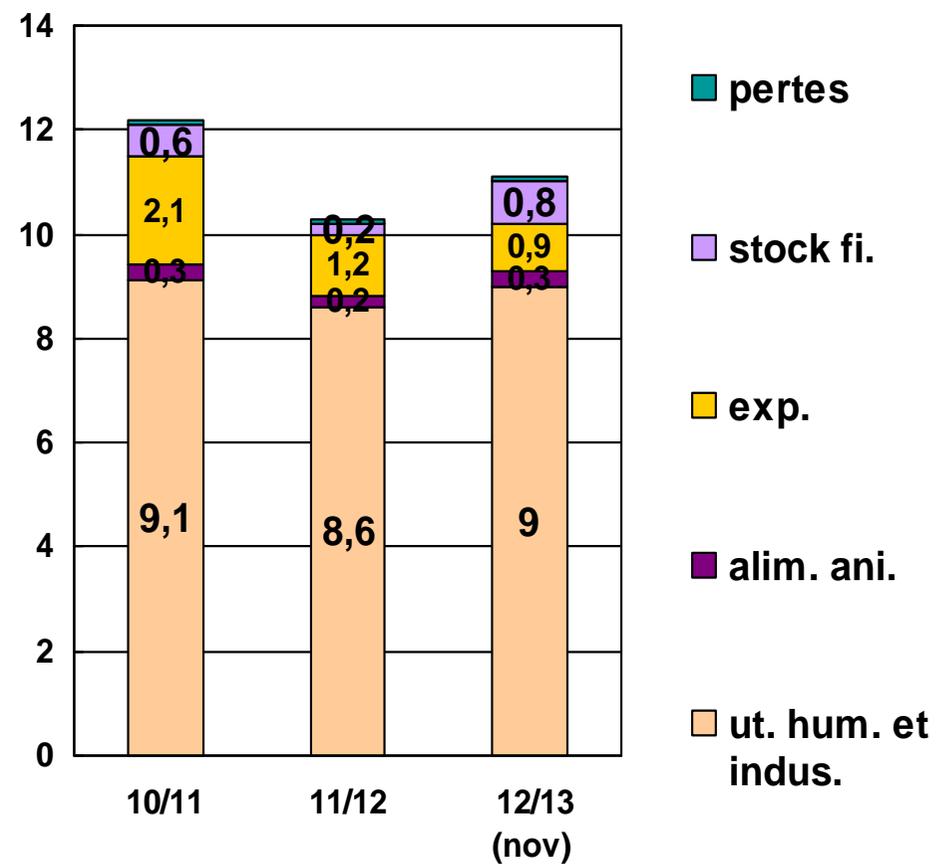


UE - bilan blé dur

Total dispo 2012/13 : 11,1 Mt

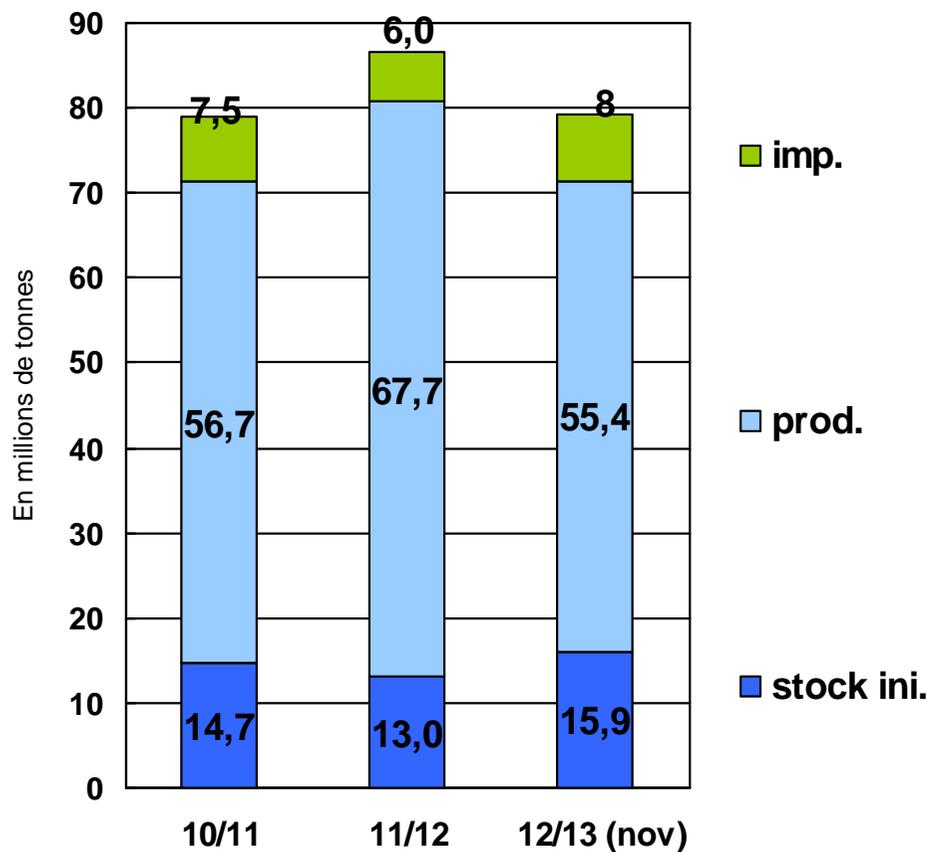


Total utilisation 2012/13 : 11,1 Mt

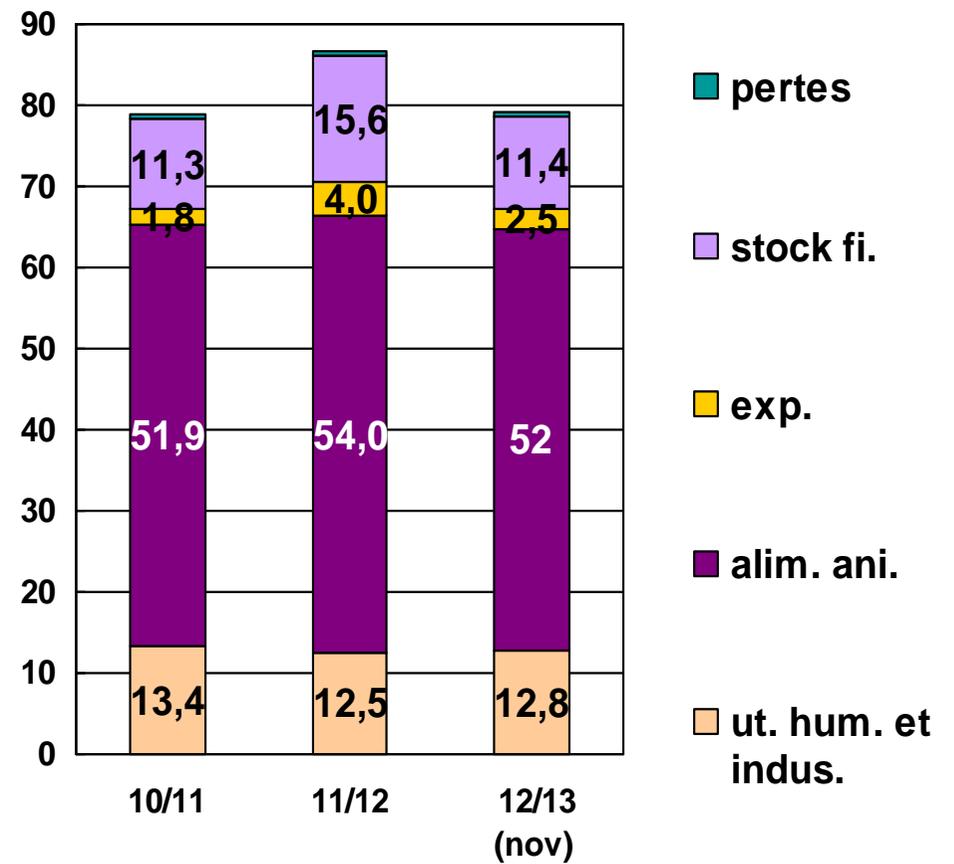


UE - bilan maïs

Total dispo 2012/13 : 79,3 Mt

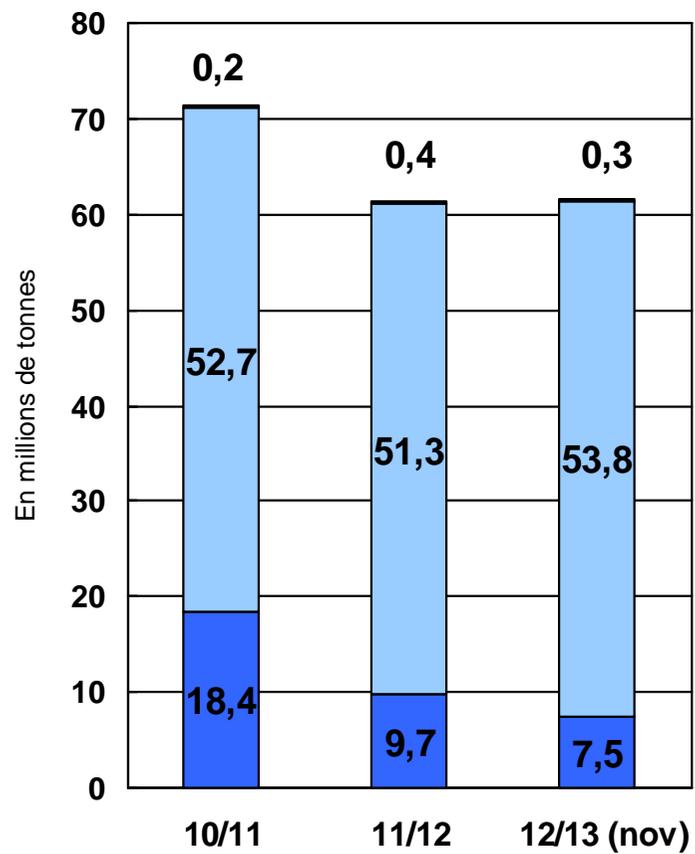


Total utilisation 2012/13 : 79,3 Mt

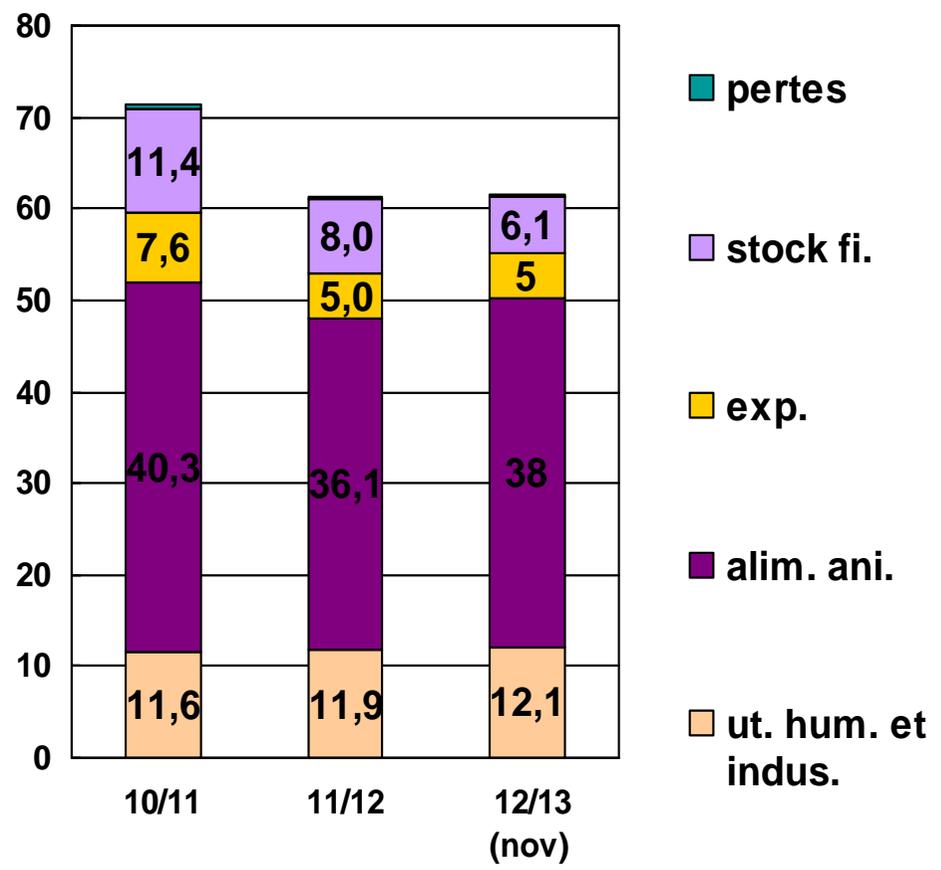


UE - bilan orge

Total dispo 2012/13 : 61,5 Mt



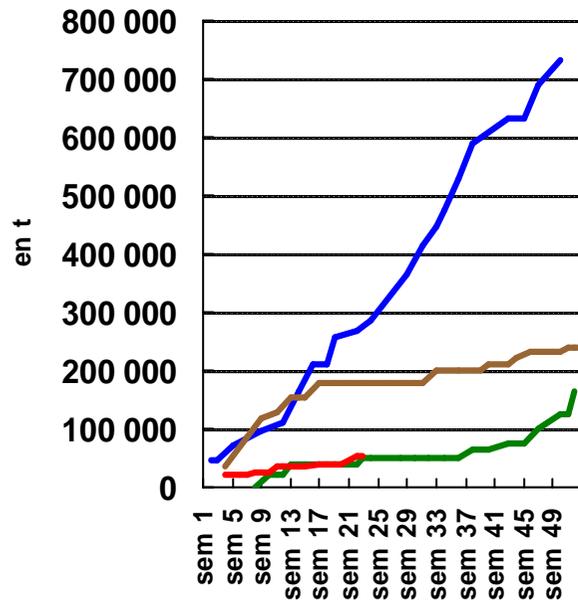
Total utilisation 2012/13 : 61,5 Mt



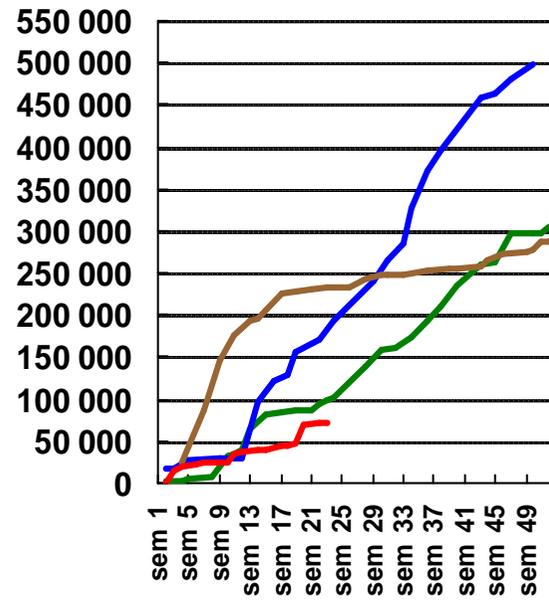
Importations de Produits de substitution des céréales (PSC)

Certificats délivrés, en cumul depuis le début de campagne

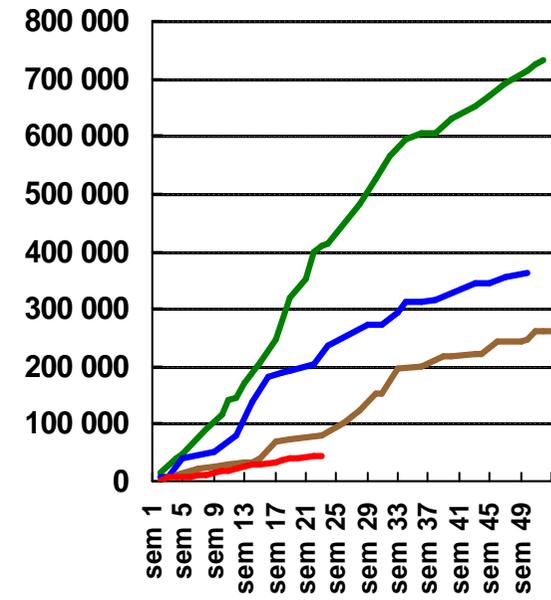
Corn gluten feed



Drèches de brasserie

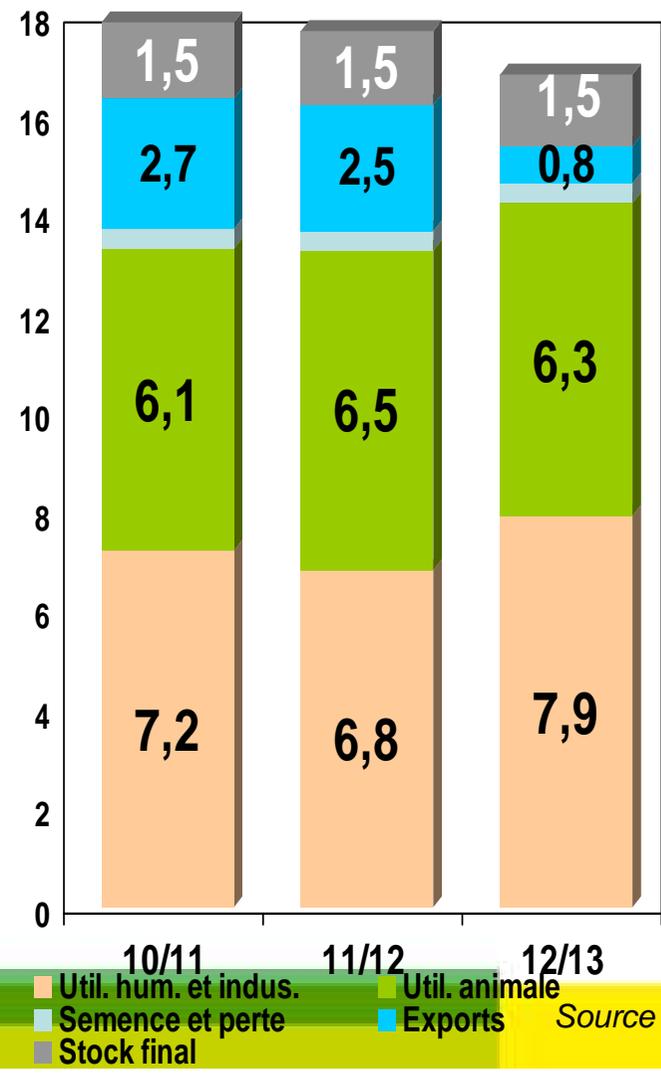
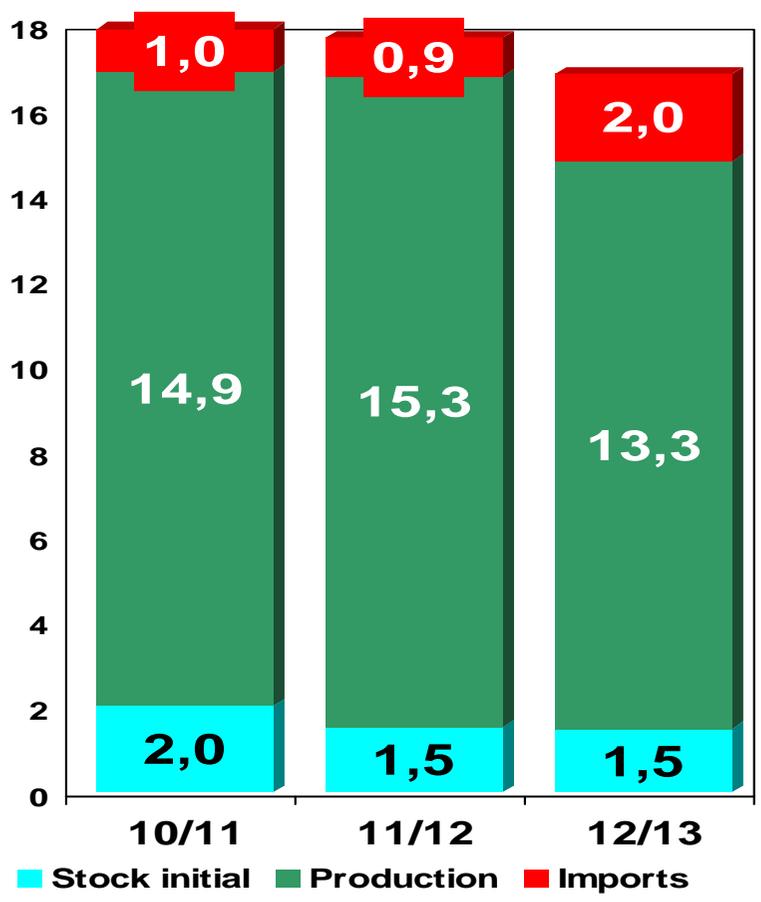


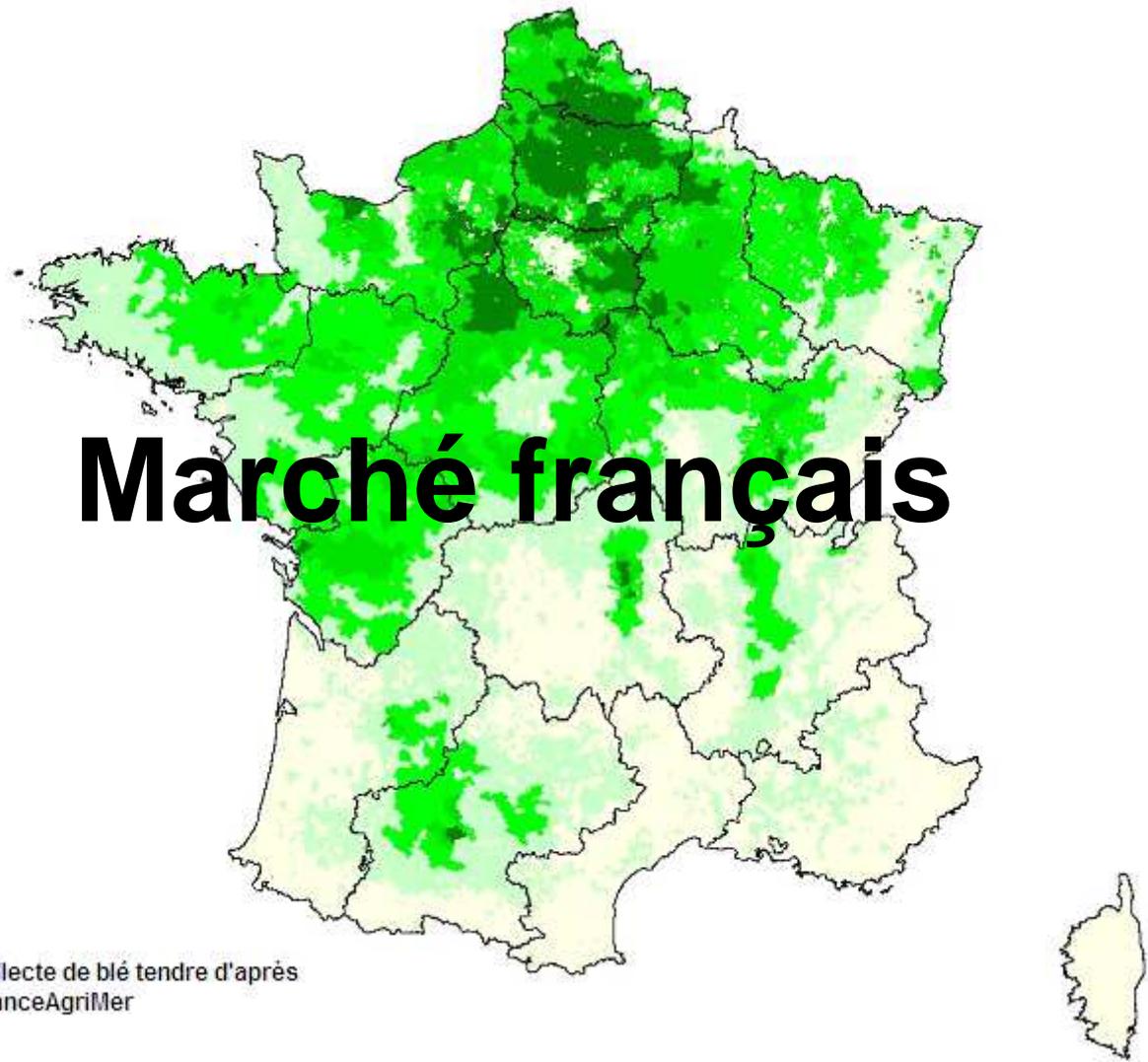
Pulpes d'agrumes



— 2009/10 — 2010/11
— 2011/12 — 2012/13

Royaume-Uni : bilan blé tendre

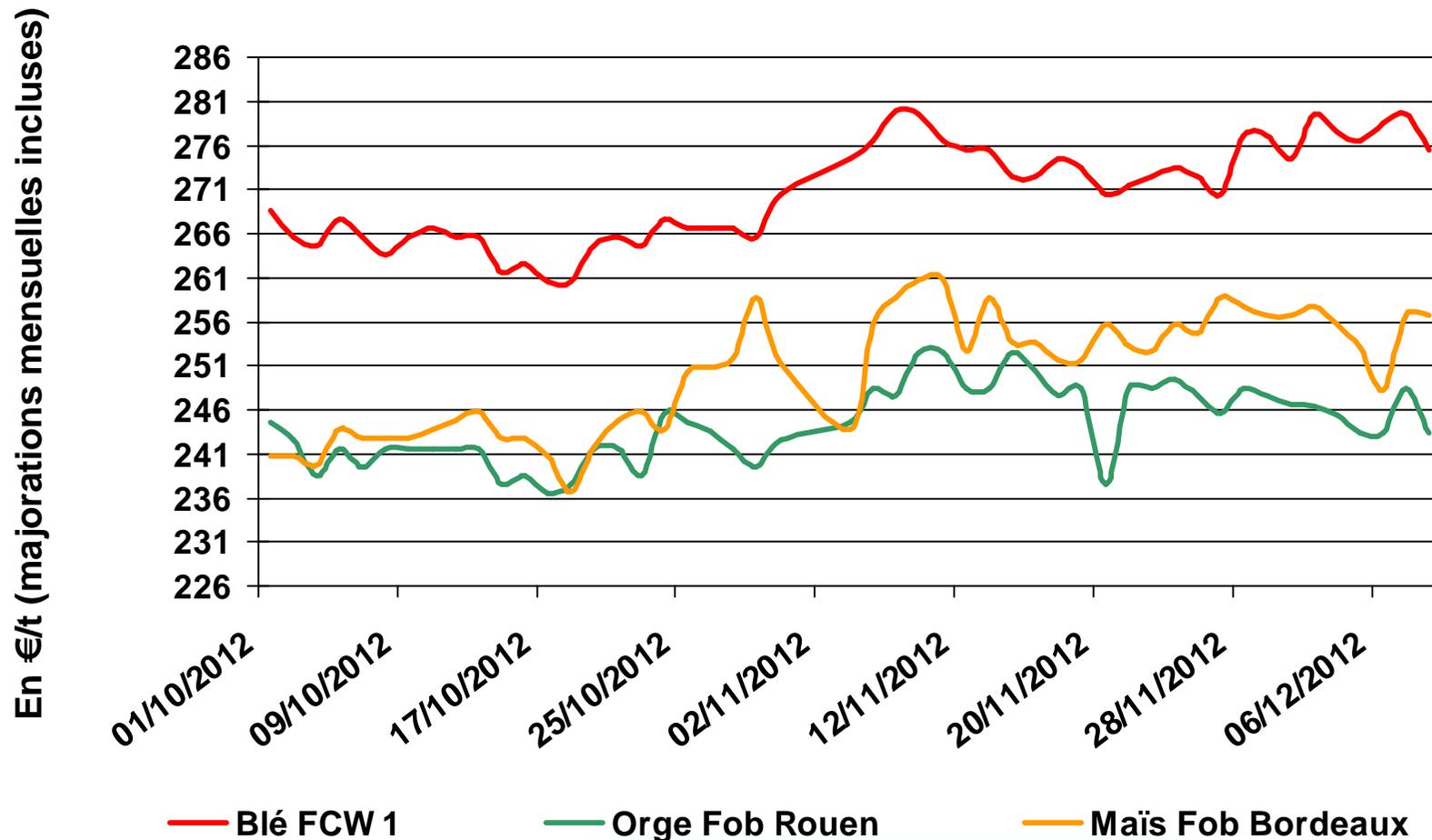




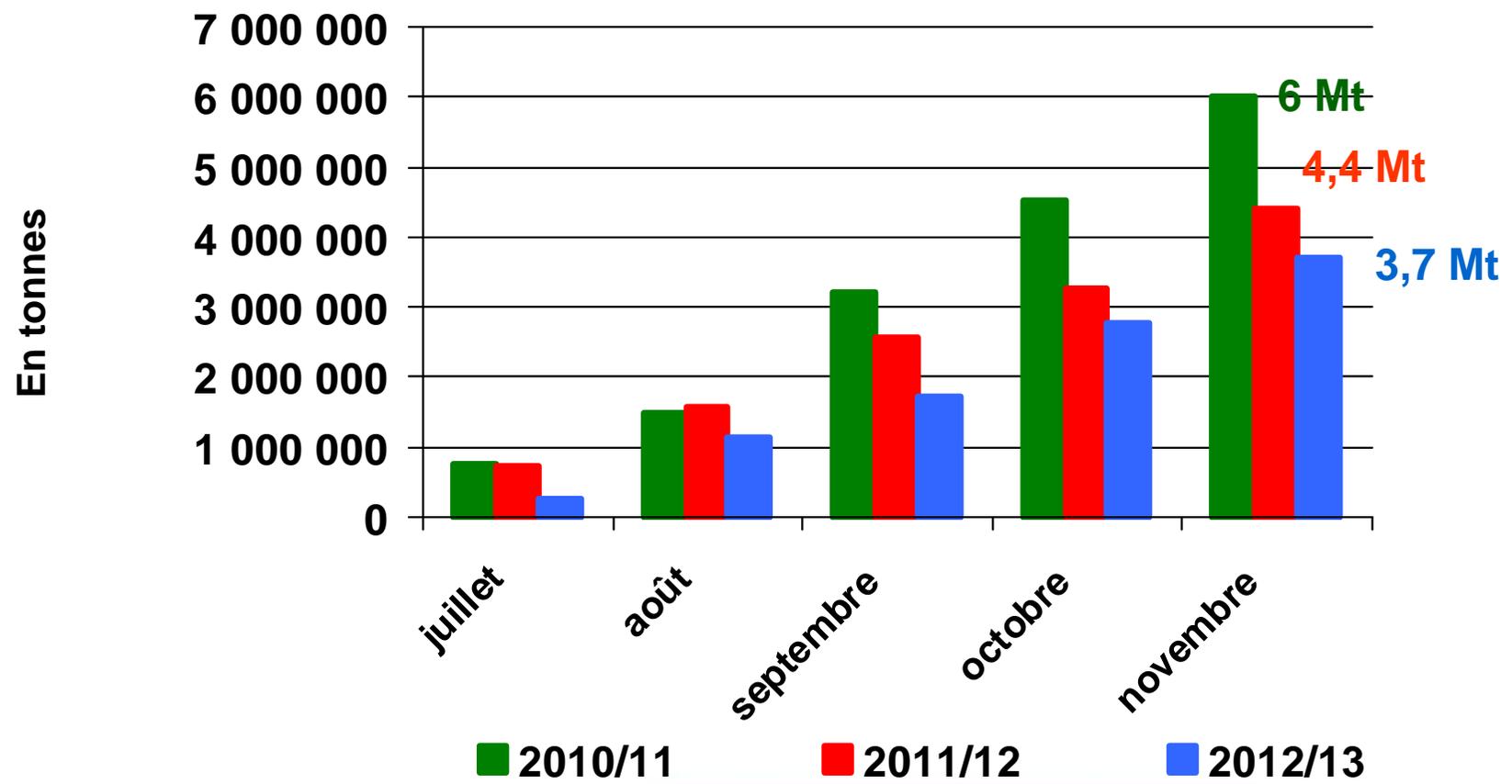
densité de collecte de blé tendre d'après les états 1 FranceAgriMer



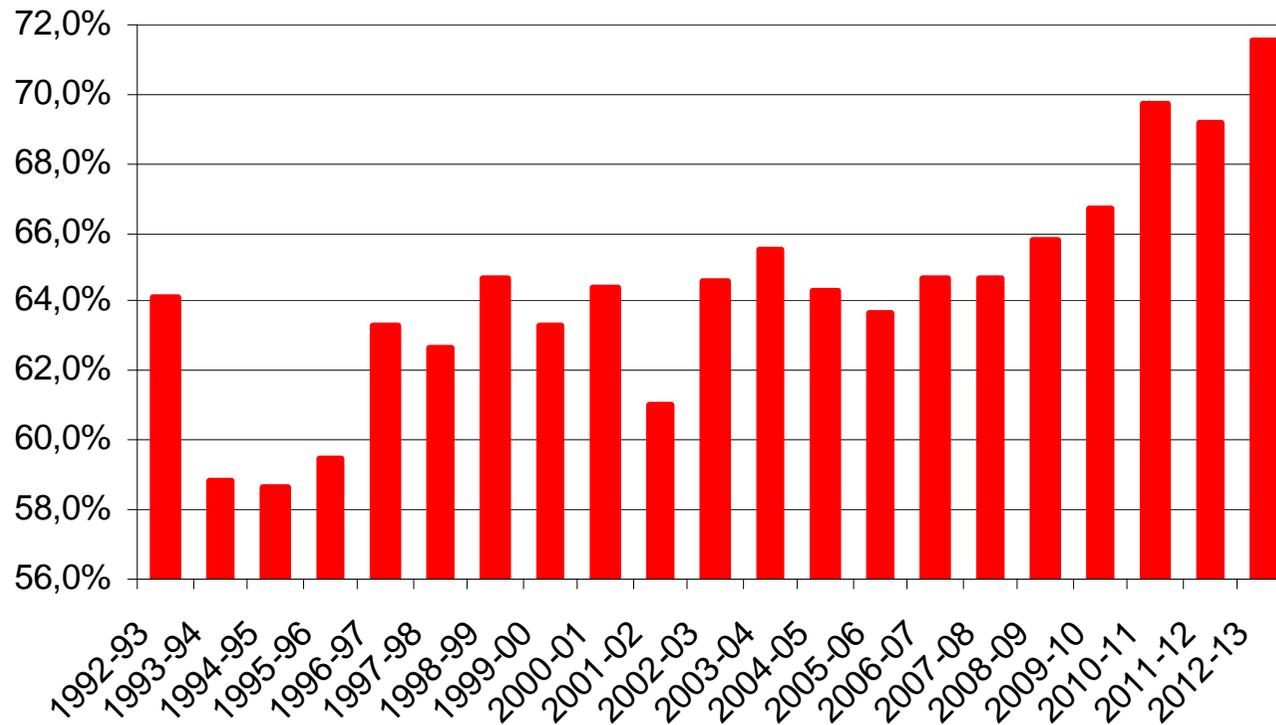
Céréales françaises : cotations à l'exportation



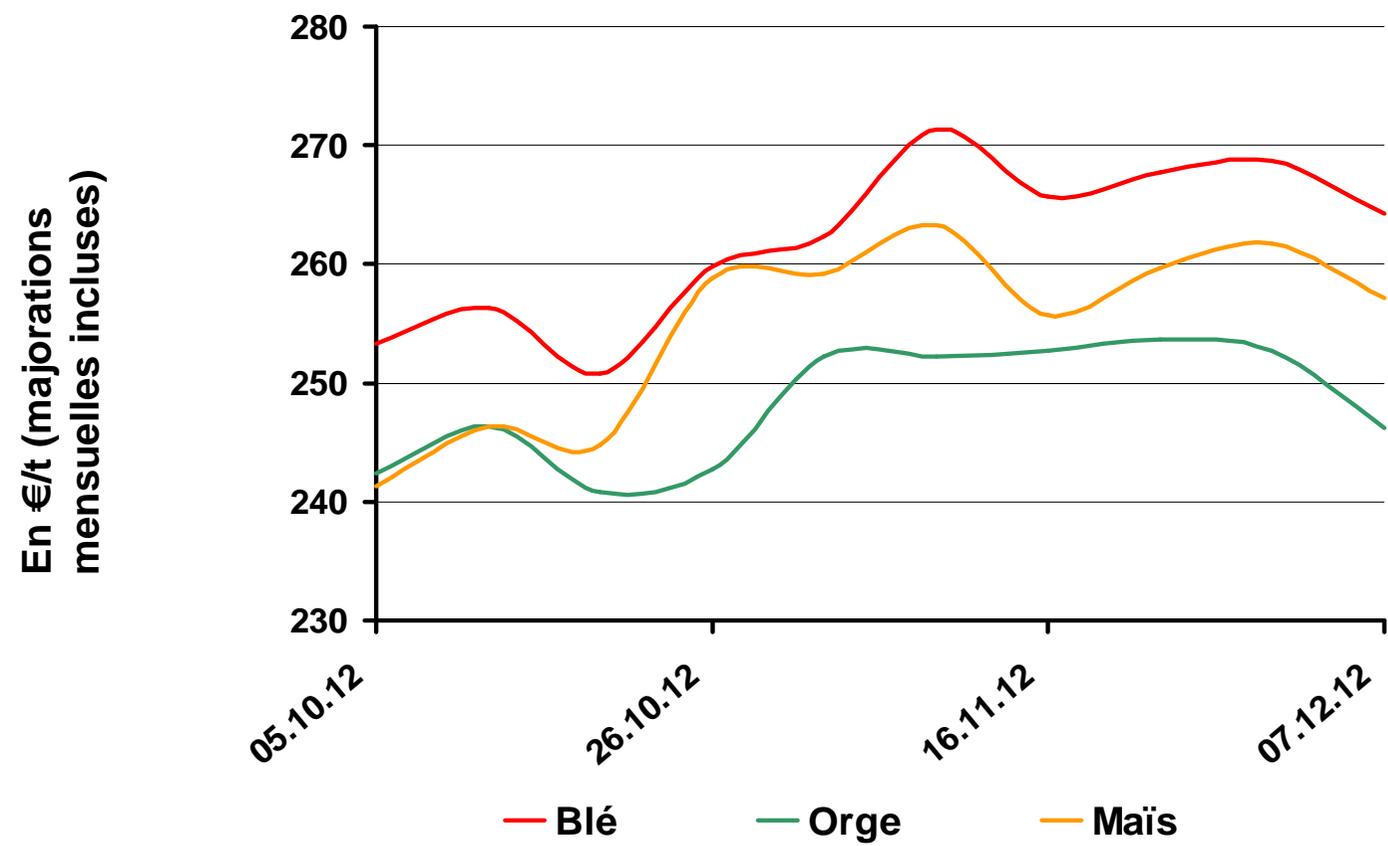
Blé tendre : cumul des embarquements vers les pays tiers depuis les ports français



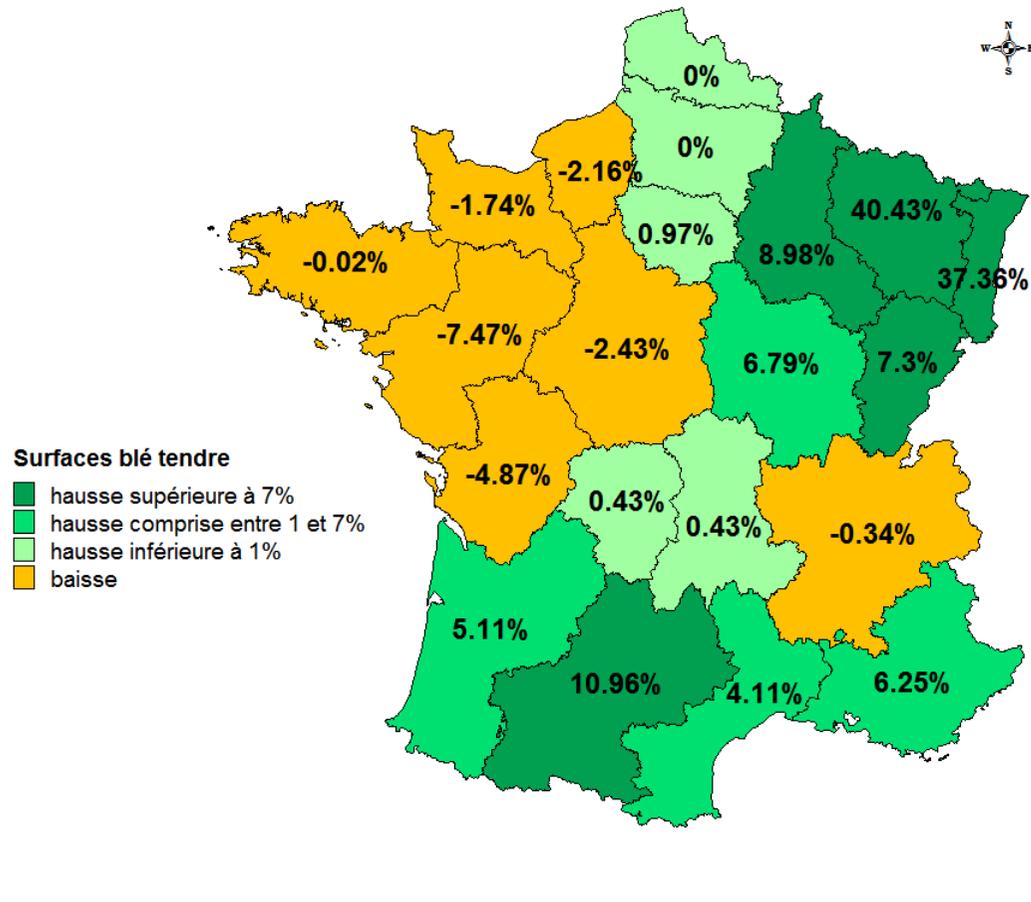
Importance des transferts physiques de blé tendre chez les collecteurs au 1er novembre



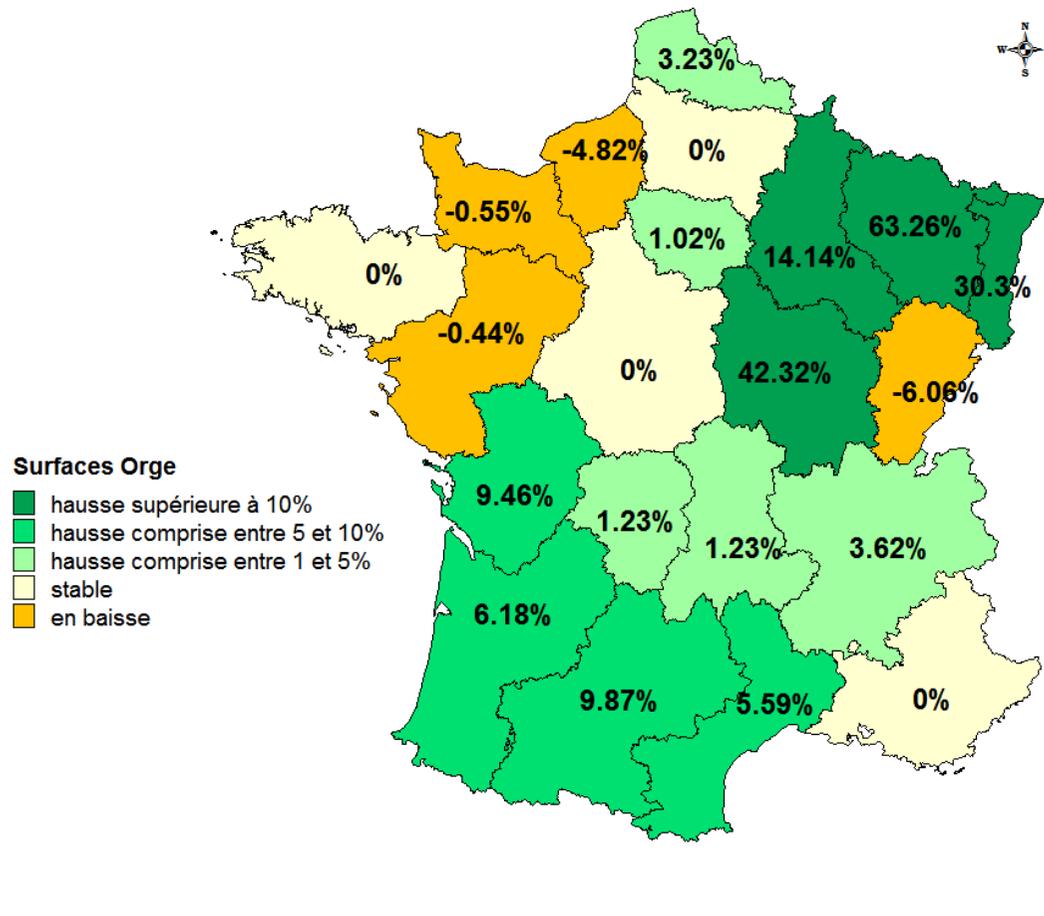
Prix du blé tendre, de l'orge et du maïs en rendu Pontivy



Blé tendre : estimations d'ensemencements récolte 2013 par rapport à la récolte 2012

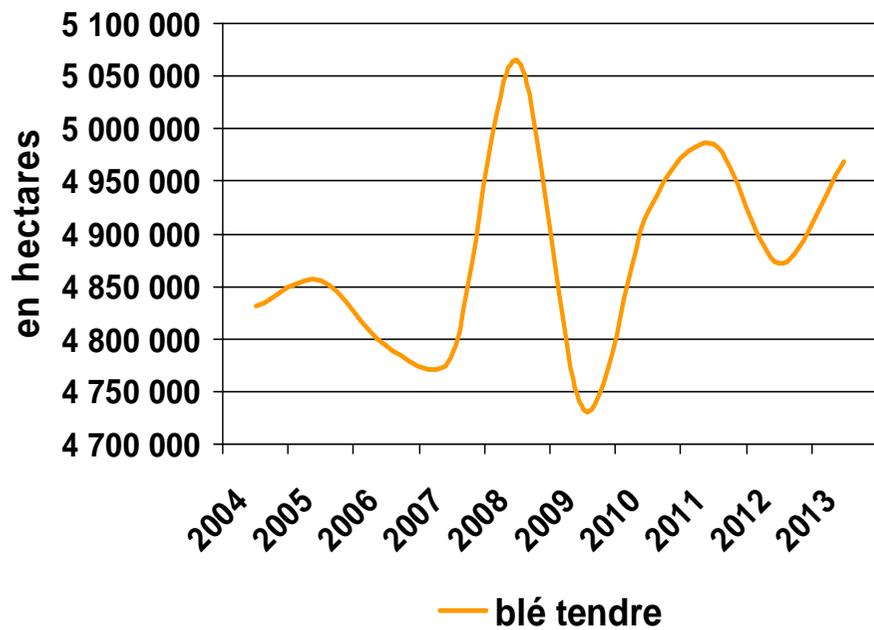


Orge d'hiver : estimations d'ensemencements récolte 2013 par rapport à la récolte 2012

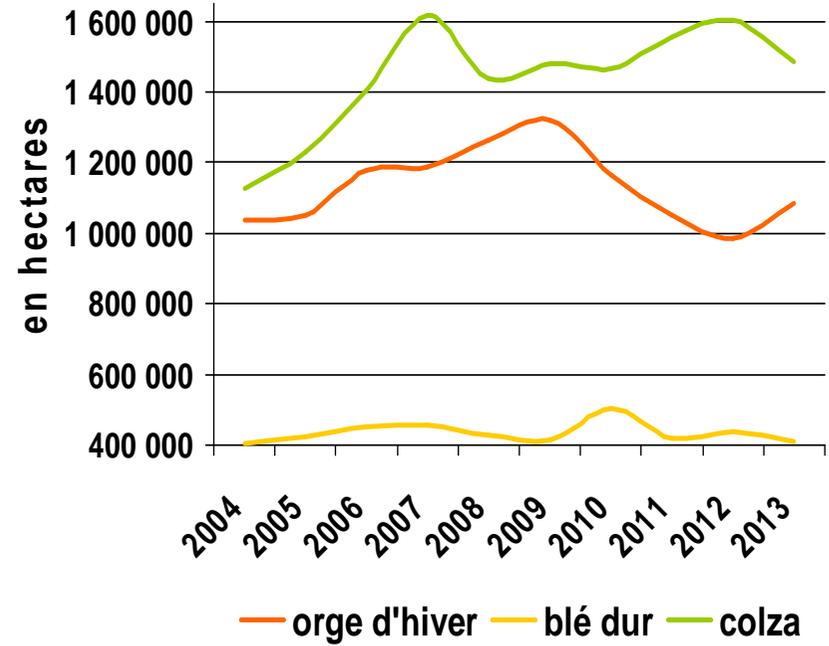


Cultures d'hiver : évolution des surfaces

Surfaces en blé tendre



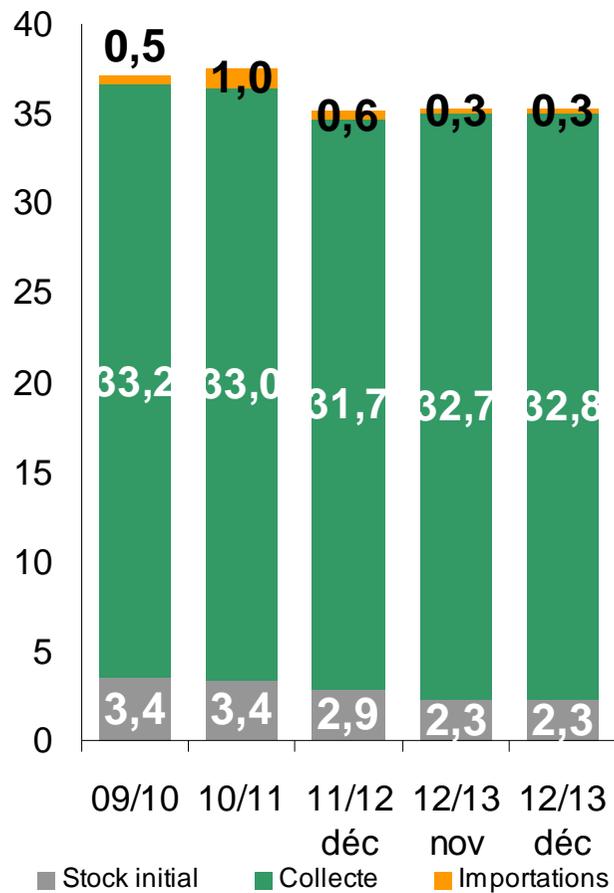
Surfaces en orge d'hiver, colza et blé dur



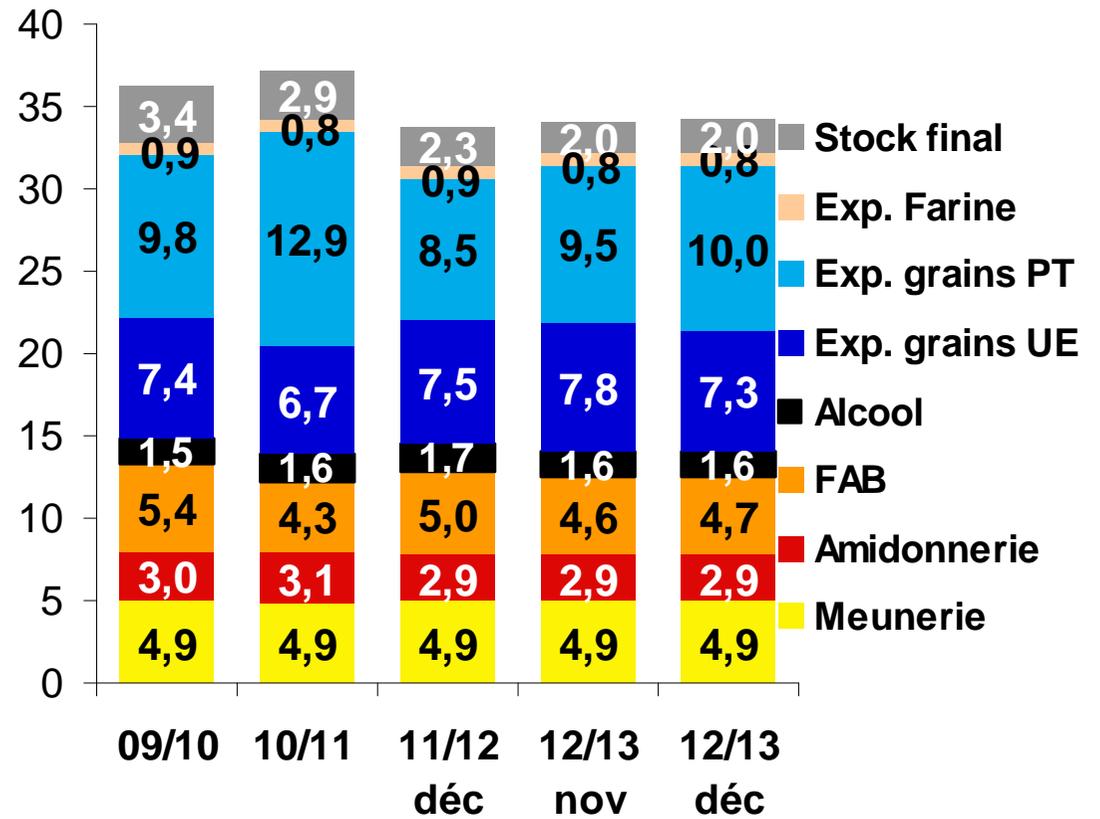


Bilan blé tendre

Mt



Mt

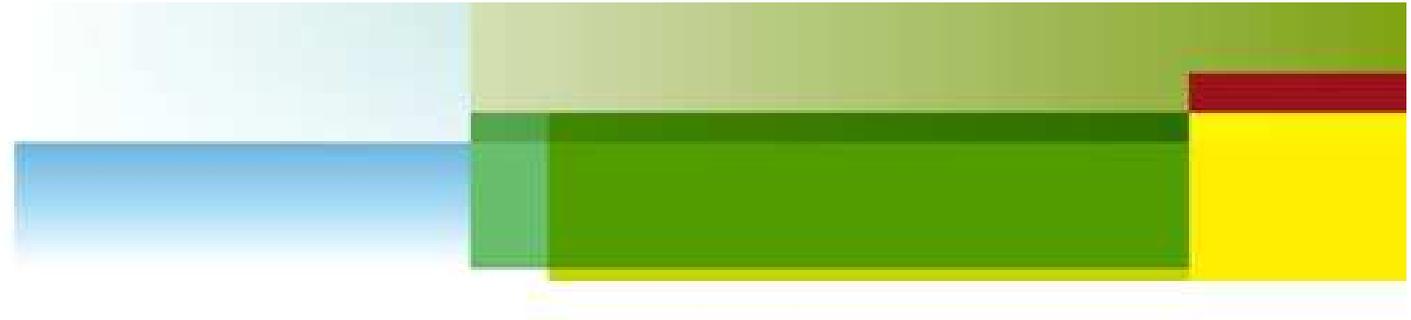




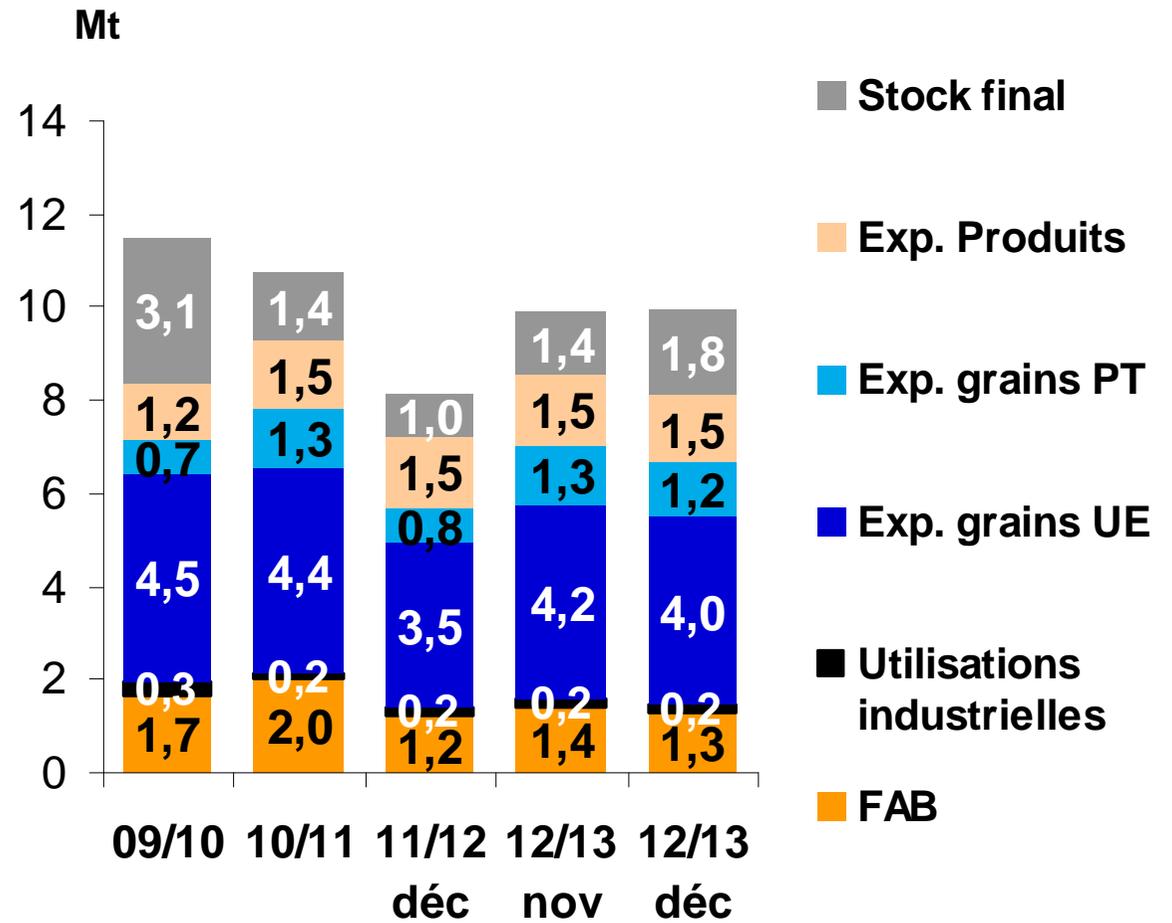
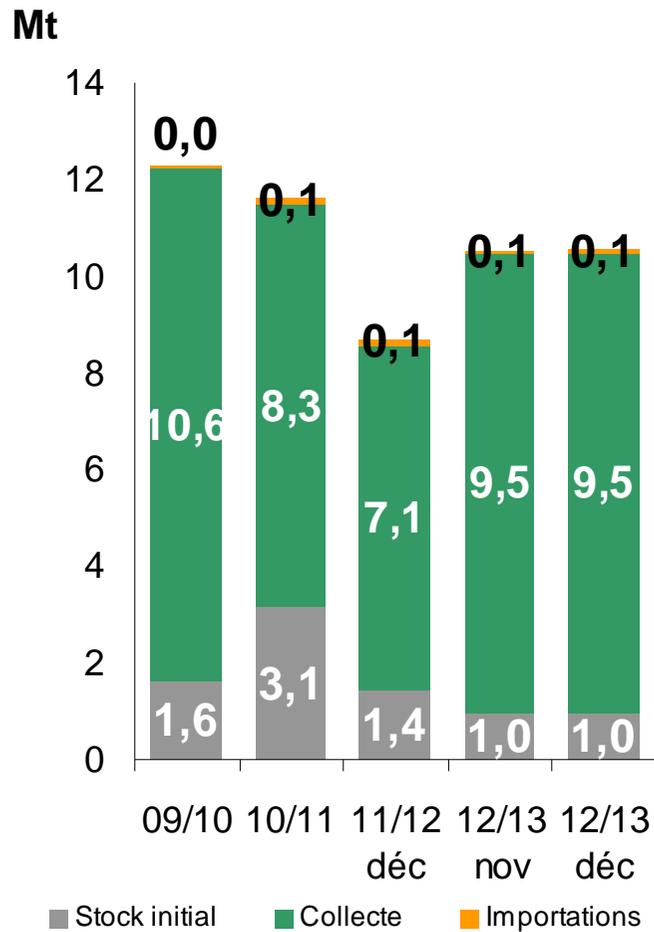
FranceAgriMer

Principales destinations potentielles sur Pays Tiers en blé français (en Mt)

Algérie	3,9
Maroc	1,8
Egypte	1,2
Yémen	0,4
Cuba	0,5
Afrique subsa	2,1
Autres	0,3
	10,0



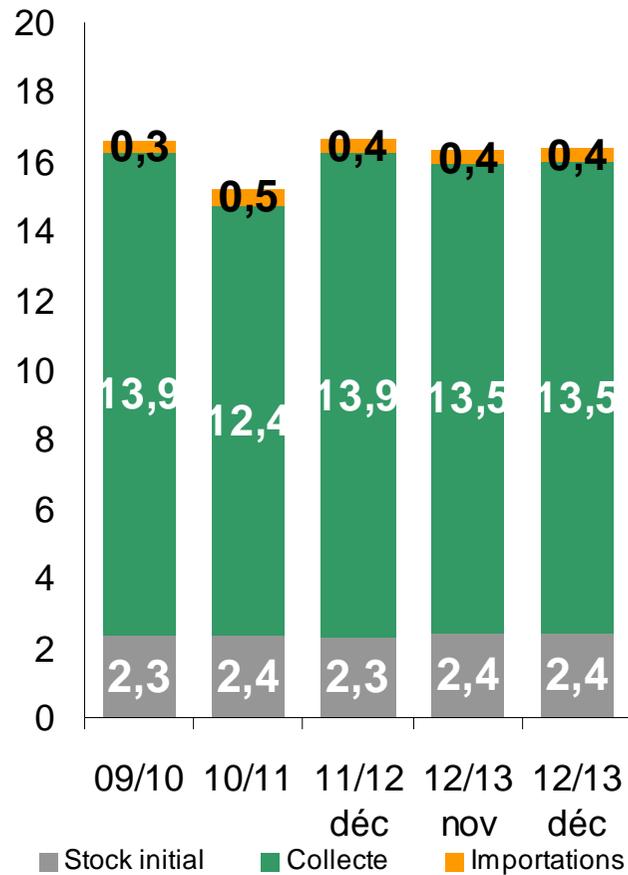
Bilan orges



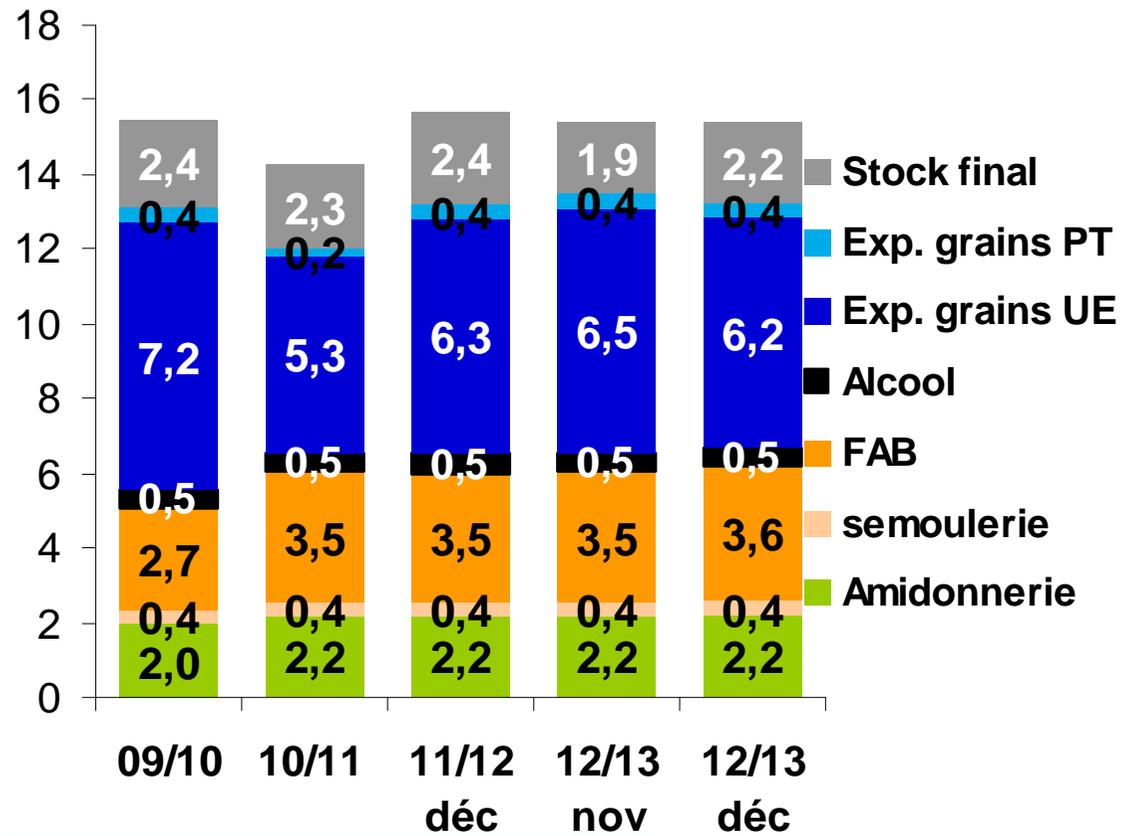


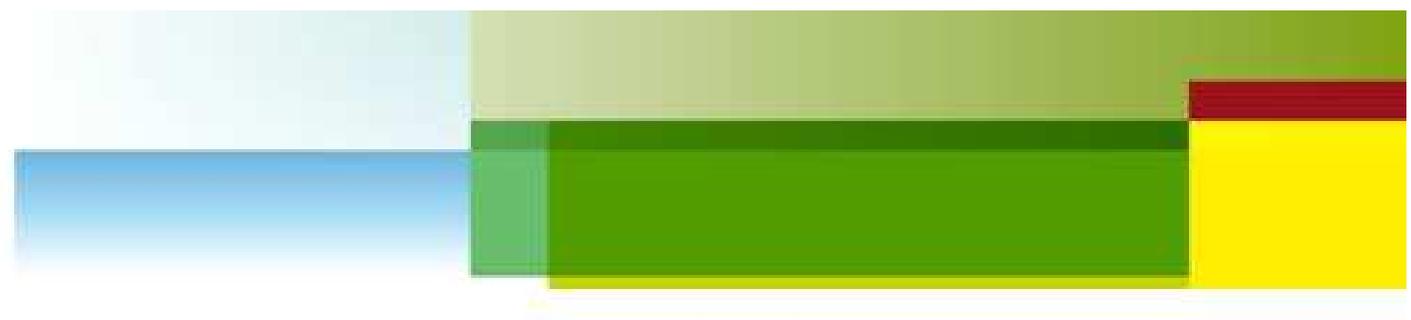
Bilan maïs

Mt

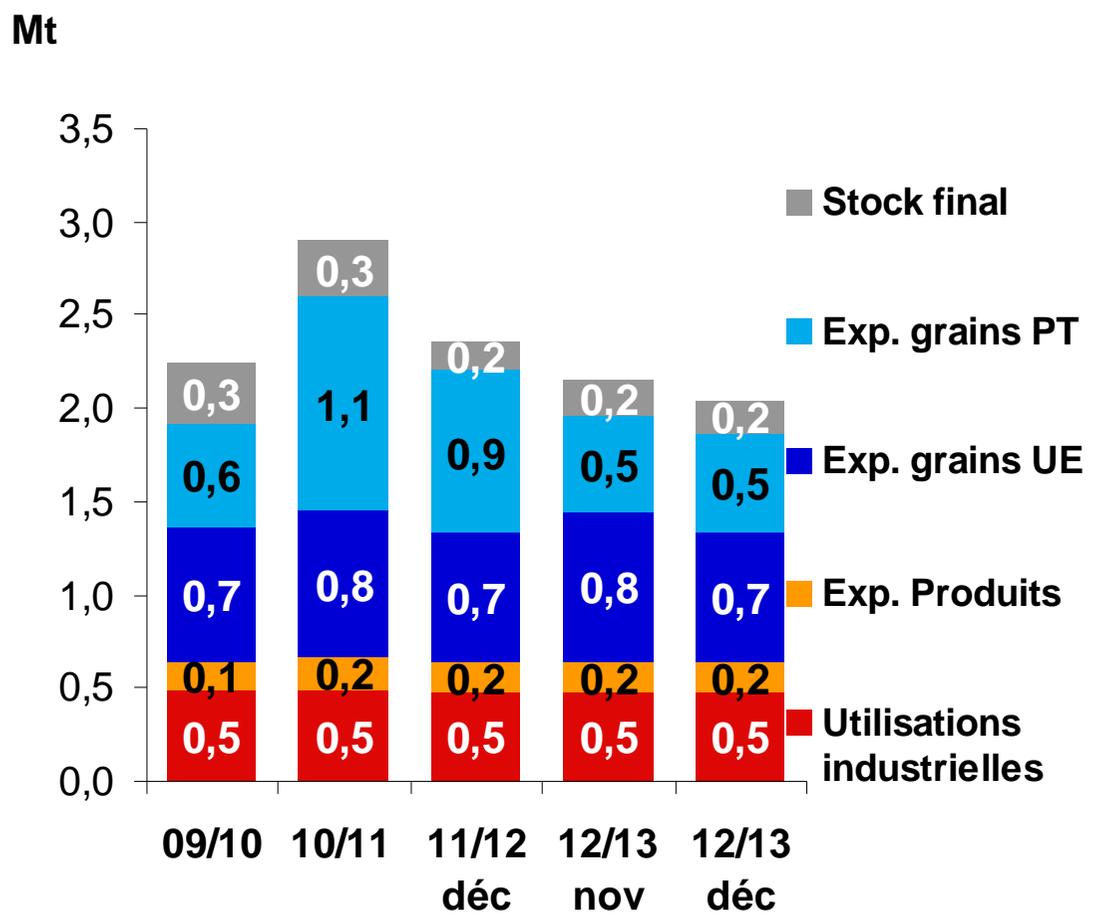
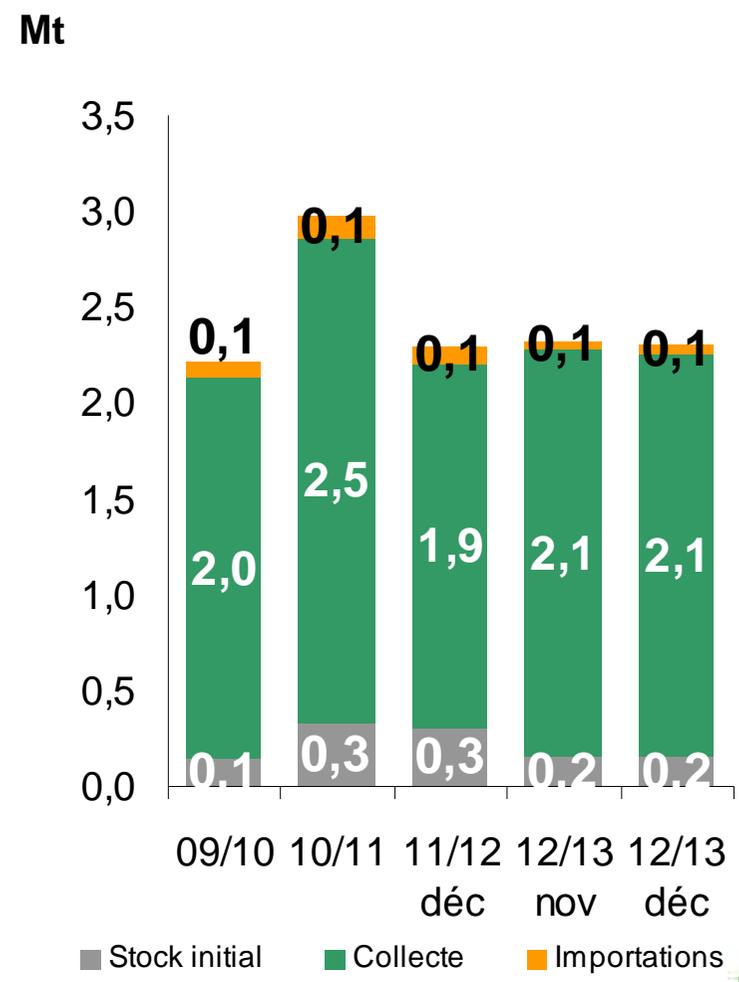


Mt





Bilan blé dur



Merci de votre attention.

Et n'oubliez pas le site Internet de FranceAgriMer



The screenshot shows the FranceAgriMer website interface. At the top, there is a navigation bar with links for 'Etablissement', 'Actualité', 'Agenda', and 'Contact'. Below this is a main menu with categories: 'Grandes cultures' (with sub-links for Céréales, Oléoprotéagineux, and Cultures textiles), 'Sucre', 'Lait', 'Viandes', 'Fruits et légumes', 'Vin et cidriculture', 'Horticulture', 'Pêche et aquaculture', 'Plantes à parfum, aromatique et médicinales', and 'Autres filières'. A secondary row of buttons includes 'La filière en bref', 'Appui à la filière', 'Aides', 'Informations économiques', and 'International'. The main content area is titled 'Céréales' and features a large image of a combine harvester in a field. Below the image is a section for 'Conseil spécialisé céréales du 14 novembre 2012'. To the right, there is an 'Agenda' section with two entries: 'Comité Biomasse et biocarburant' on 07 DECE 2012 and 'Conseil spécialisé Céréales - 12 décembre 2012'. Further right is a search bar and a section titled 'En un clic' with links to 'Observatoires', 'Dossiers des Conseils et comités', 'Cotations', 'Publications', and 'Réglementation agricole'. At the bottom right, there is a 'Marque-pages' section with a button to 'Ajouter à mes marque-pages' and an 'Envoyer par mail' option.

<http://www.franceagrimer.fr/filiere-grandes-cultures/Cereales>

