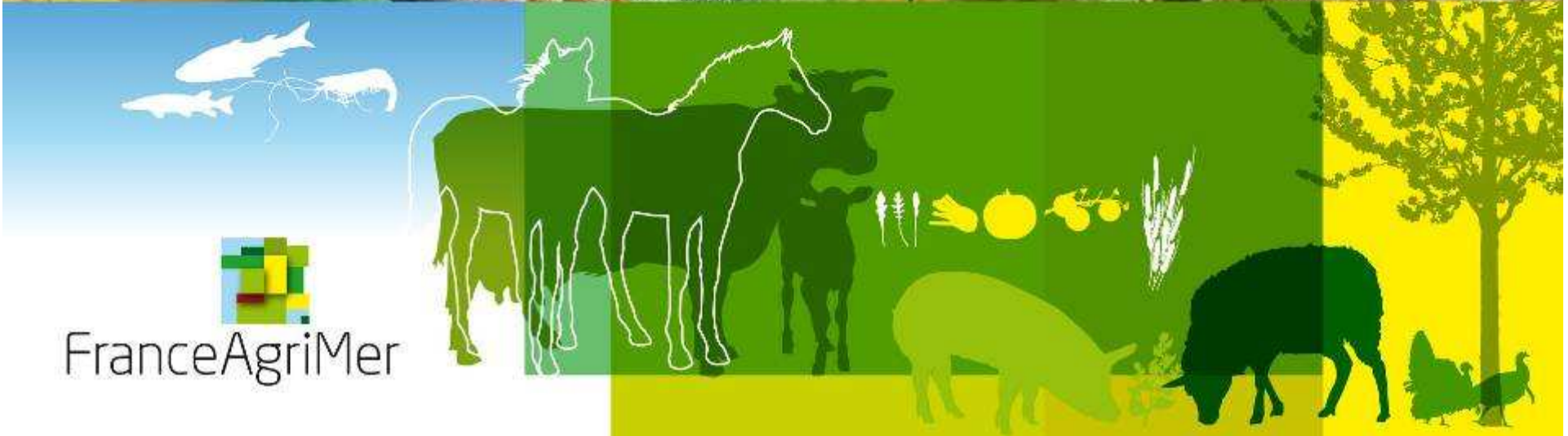


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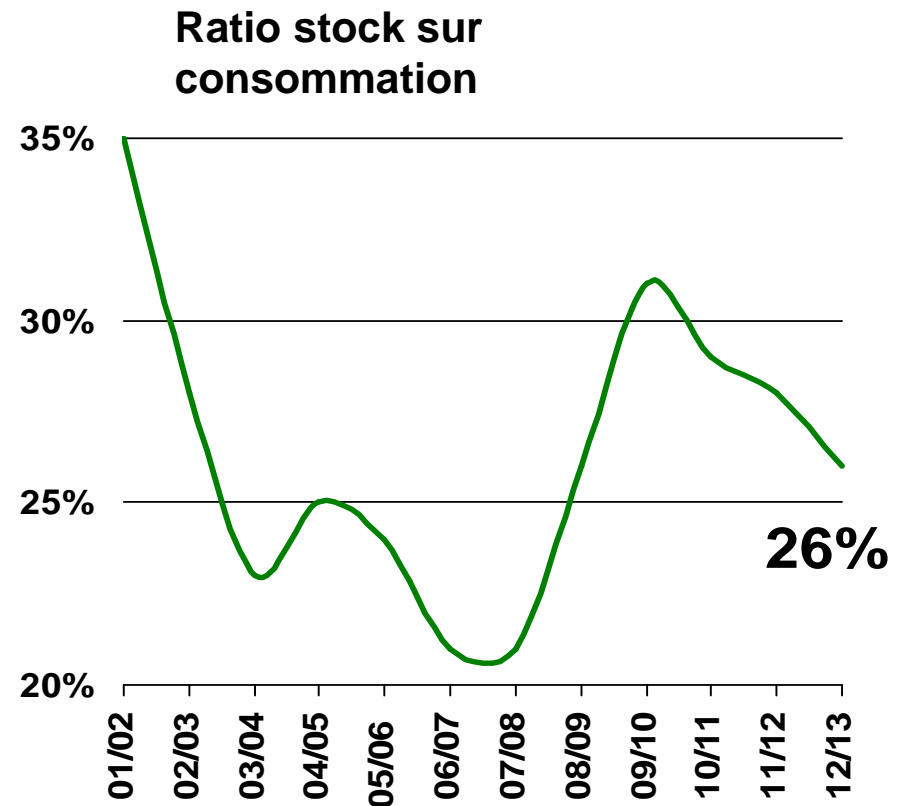
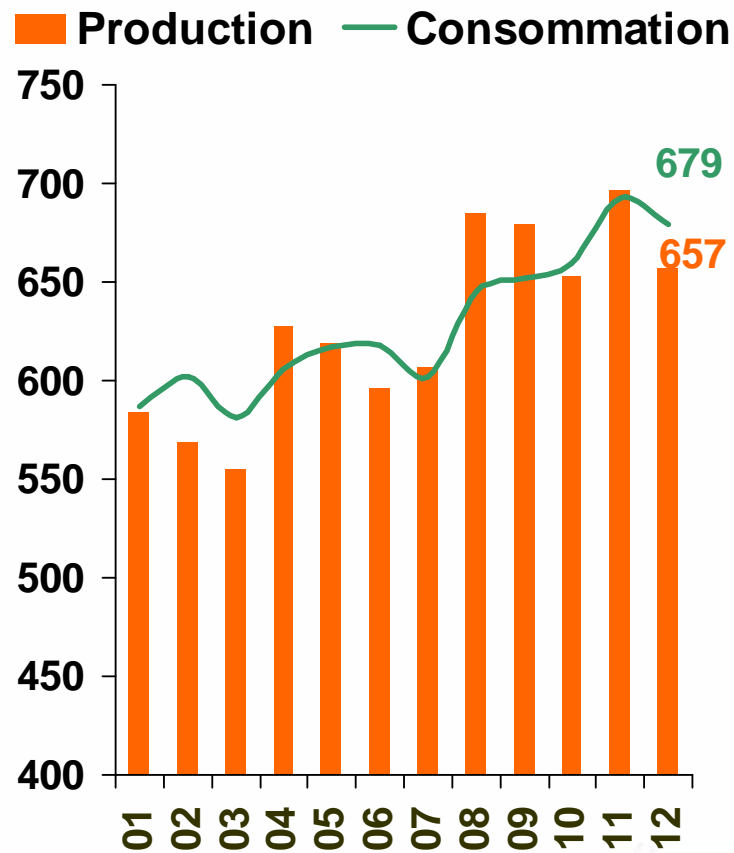


FranceAgriMer

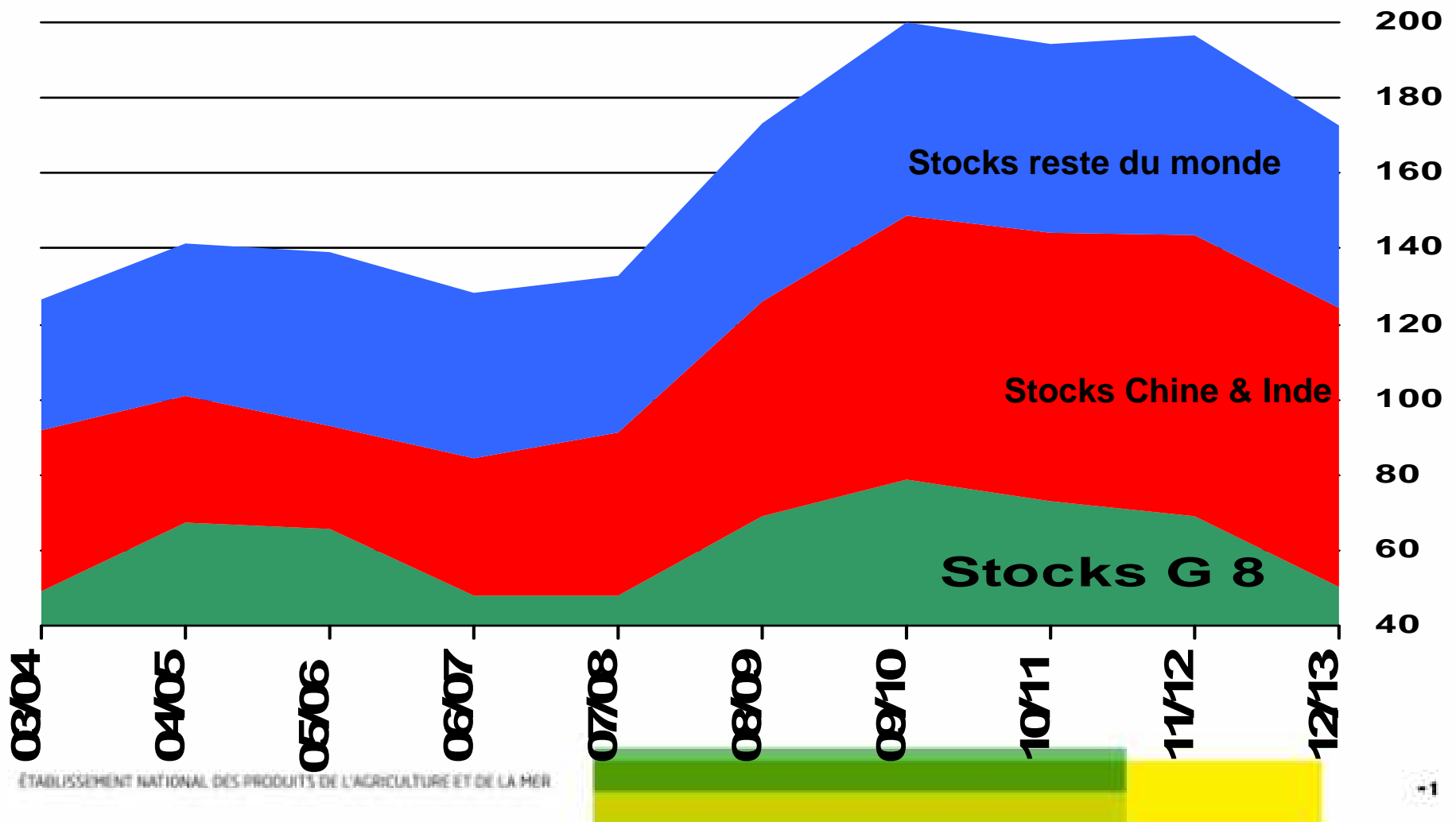
Points clefs

- Semis de maïs perturbés par la pluie en Argentine
- Conditions d'implantation non optimales aux Etats-Unis
- Récolte de maïs UE fortement pénalisées par la canicule en Europe centrale
- Récolte de maïs en retard en France
- Semis d'hiver pénalisés par les pluies

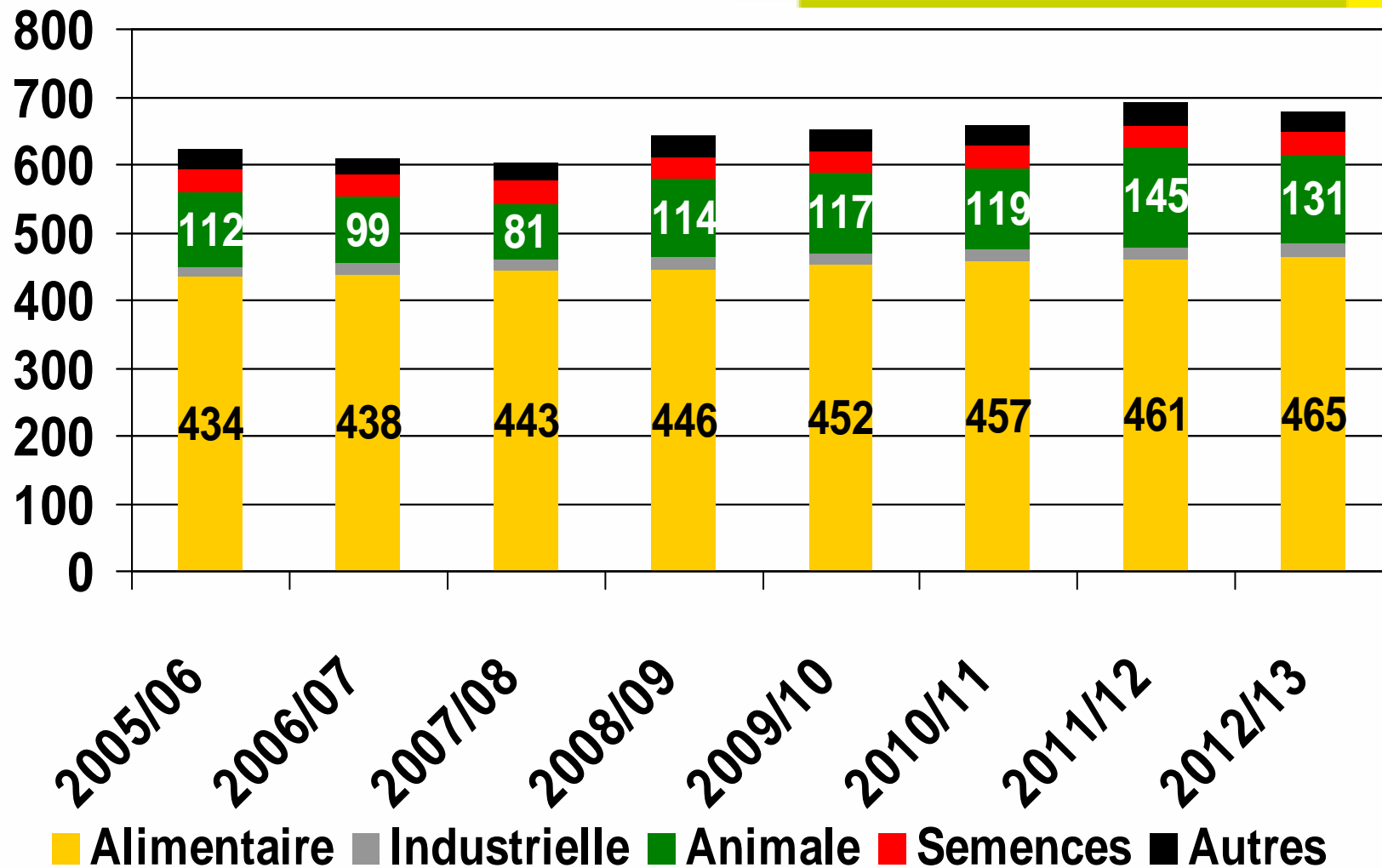
Bilan mondial blé 2012/13 : production, consommation et stocks



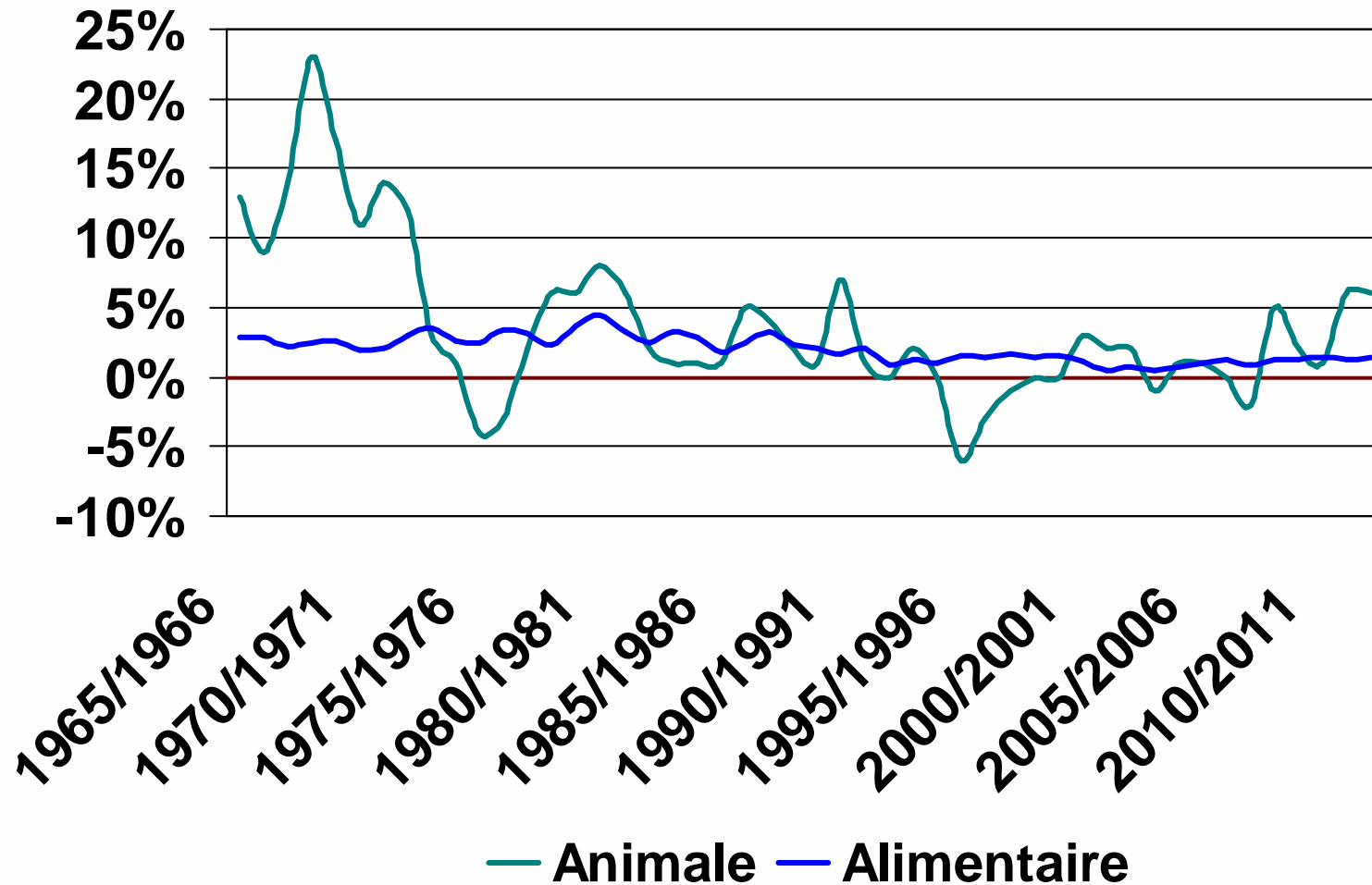
Répartition des stocks mondiaux de blé en 2012/13



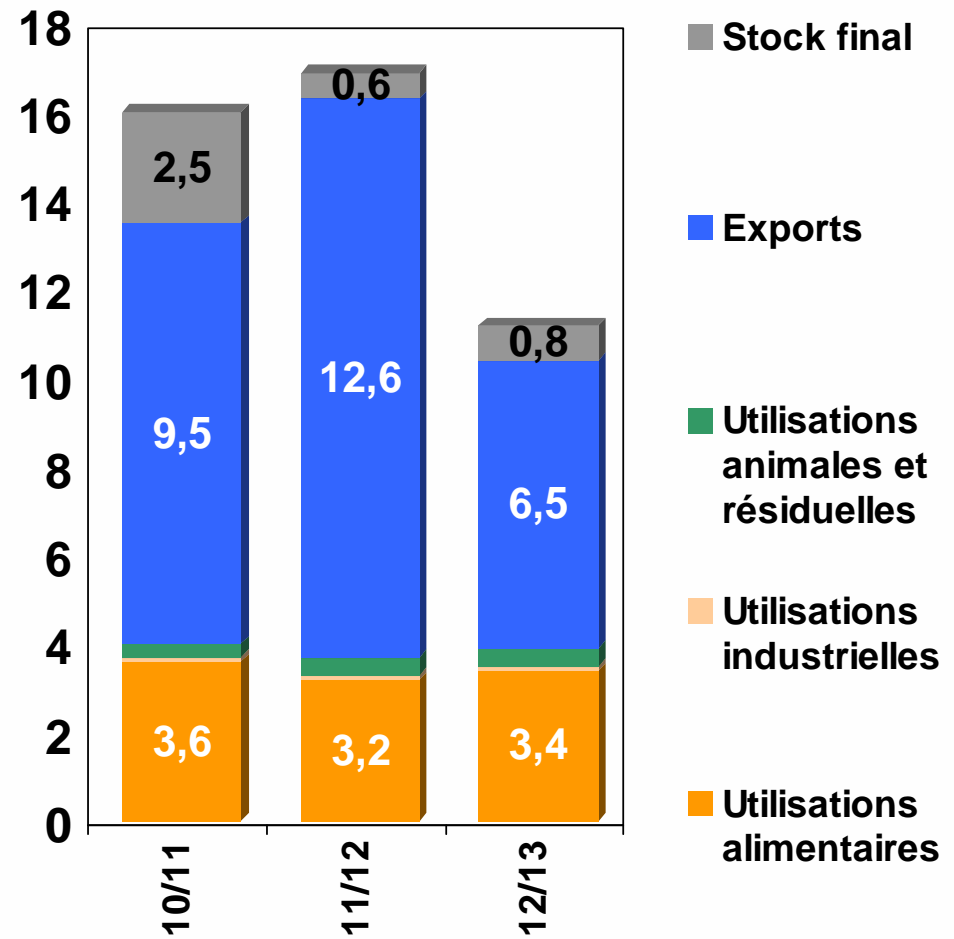
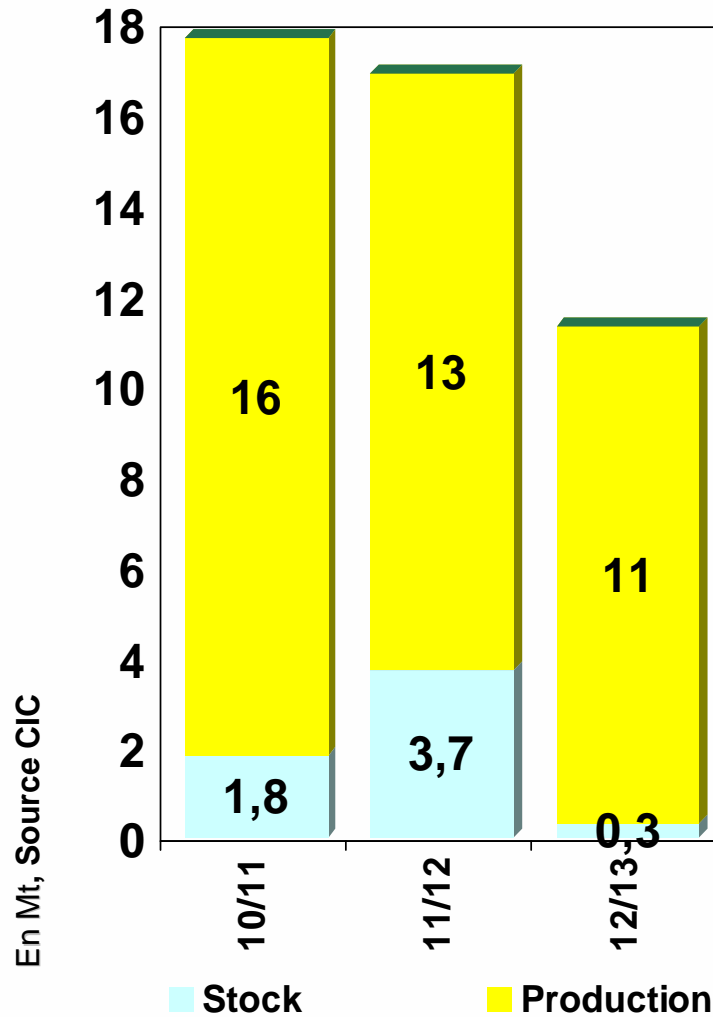
Consommation mondiale de blé



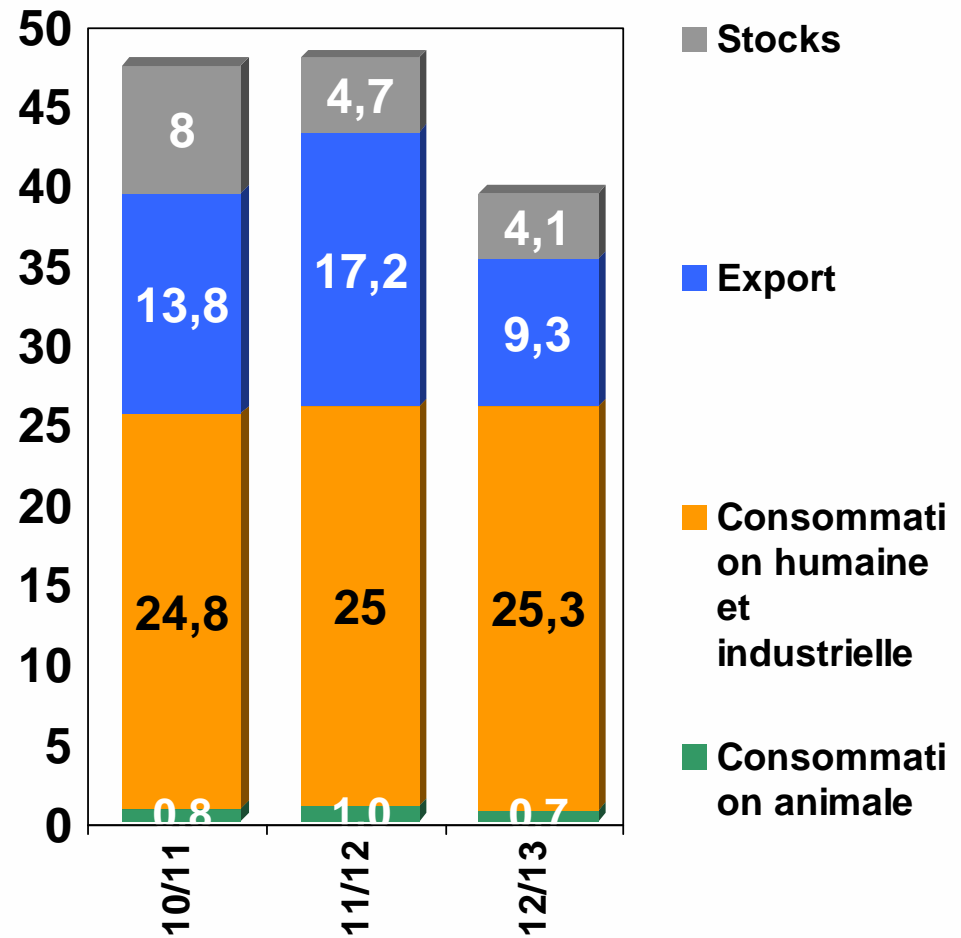
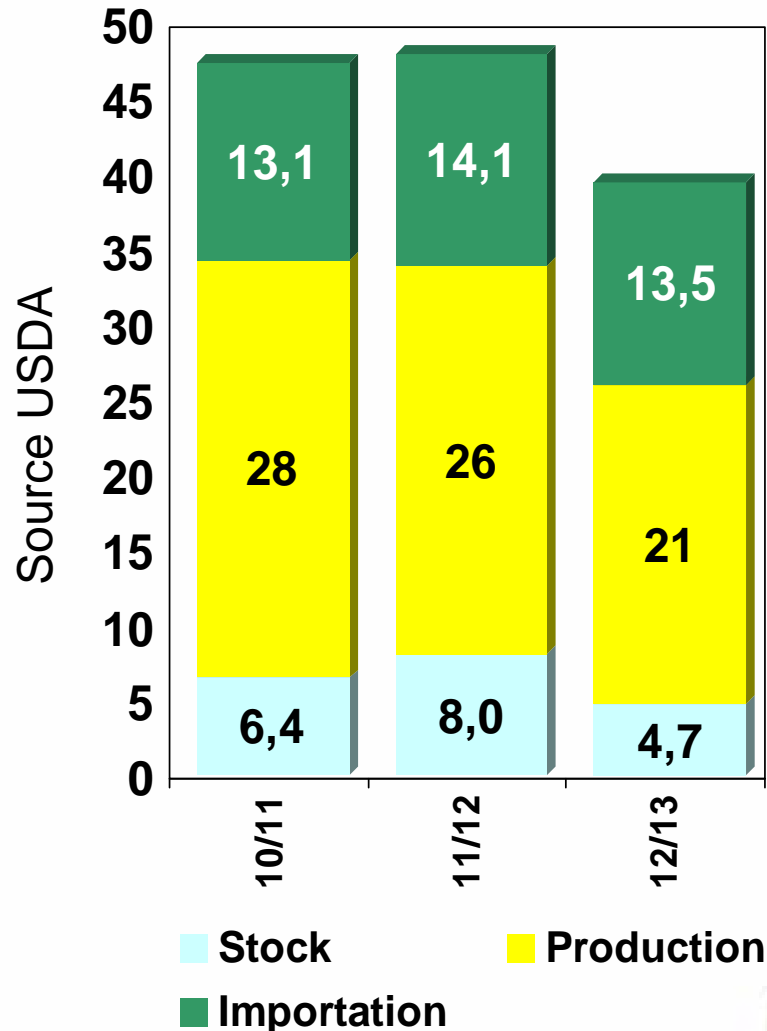
Taux de croissance de la consommation mondiale de blé



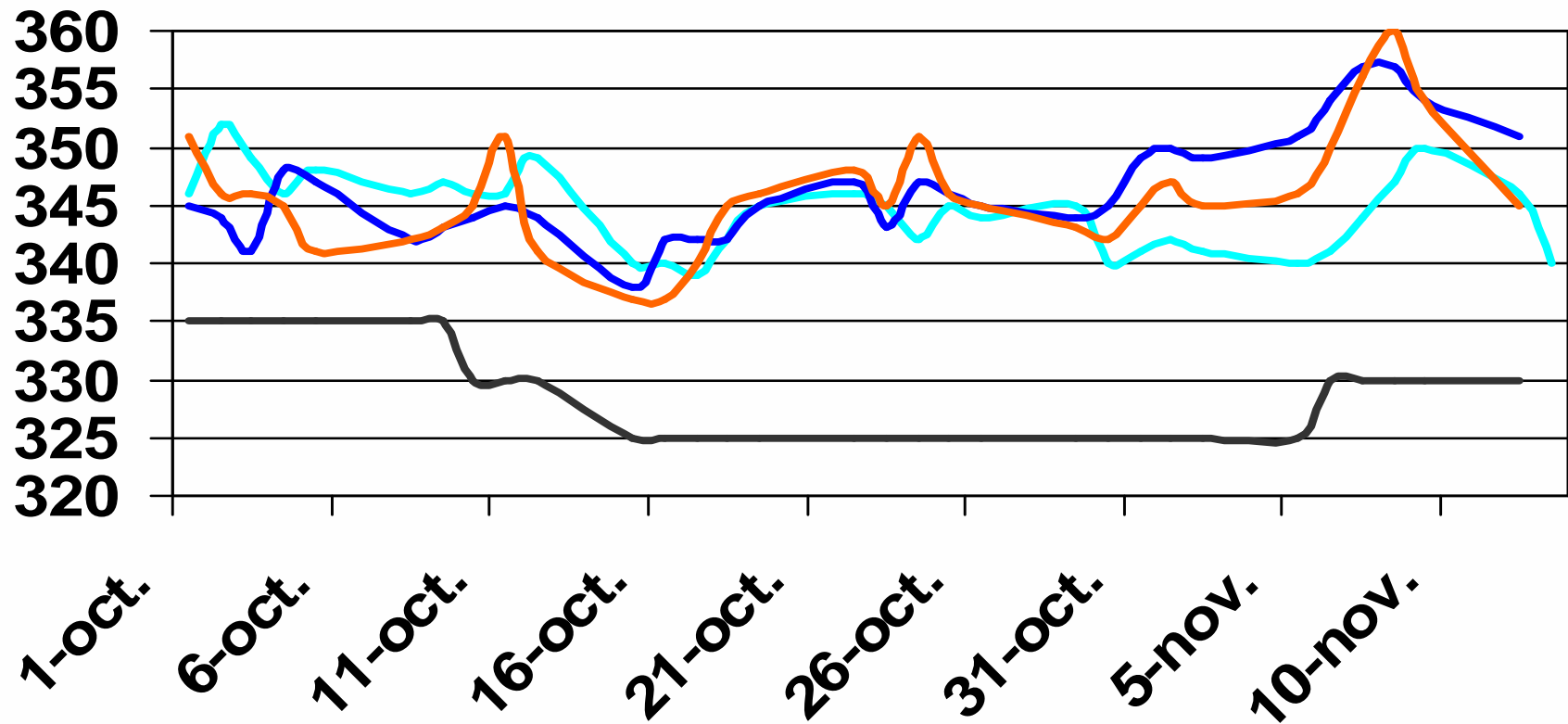
Argentine : bilan blé



Bilan blé Amérique du Sud



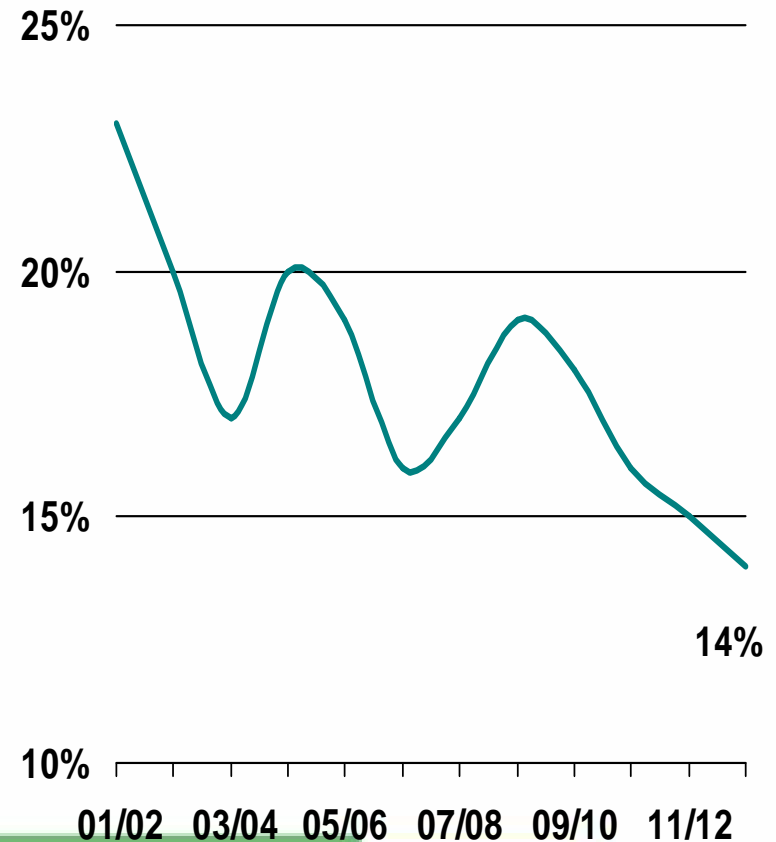
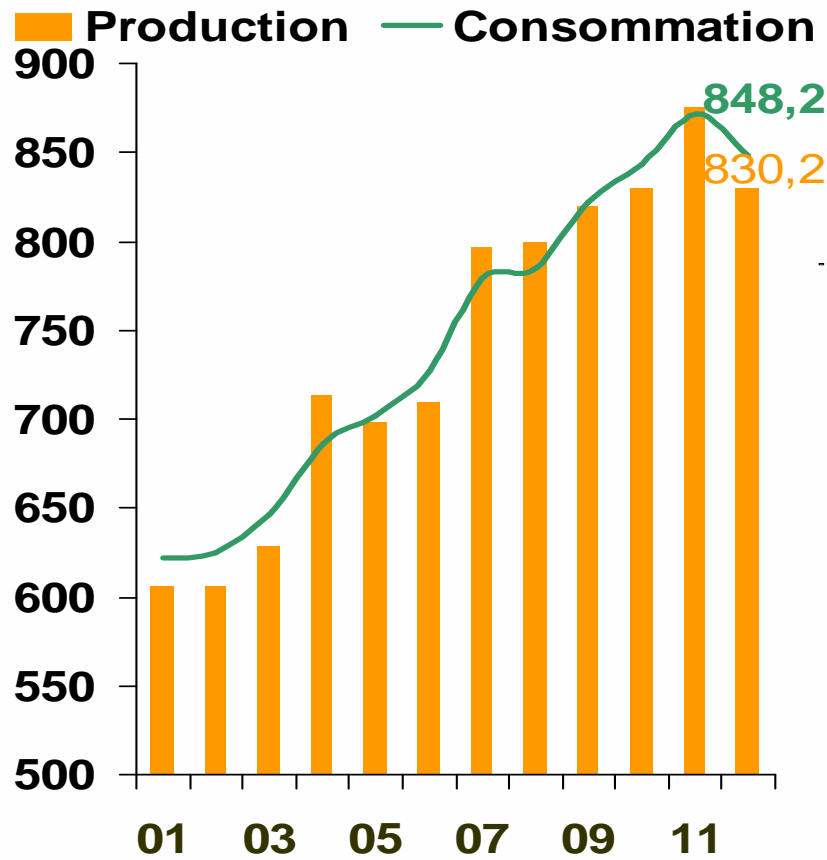
Cours du blé



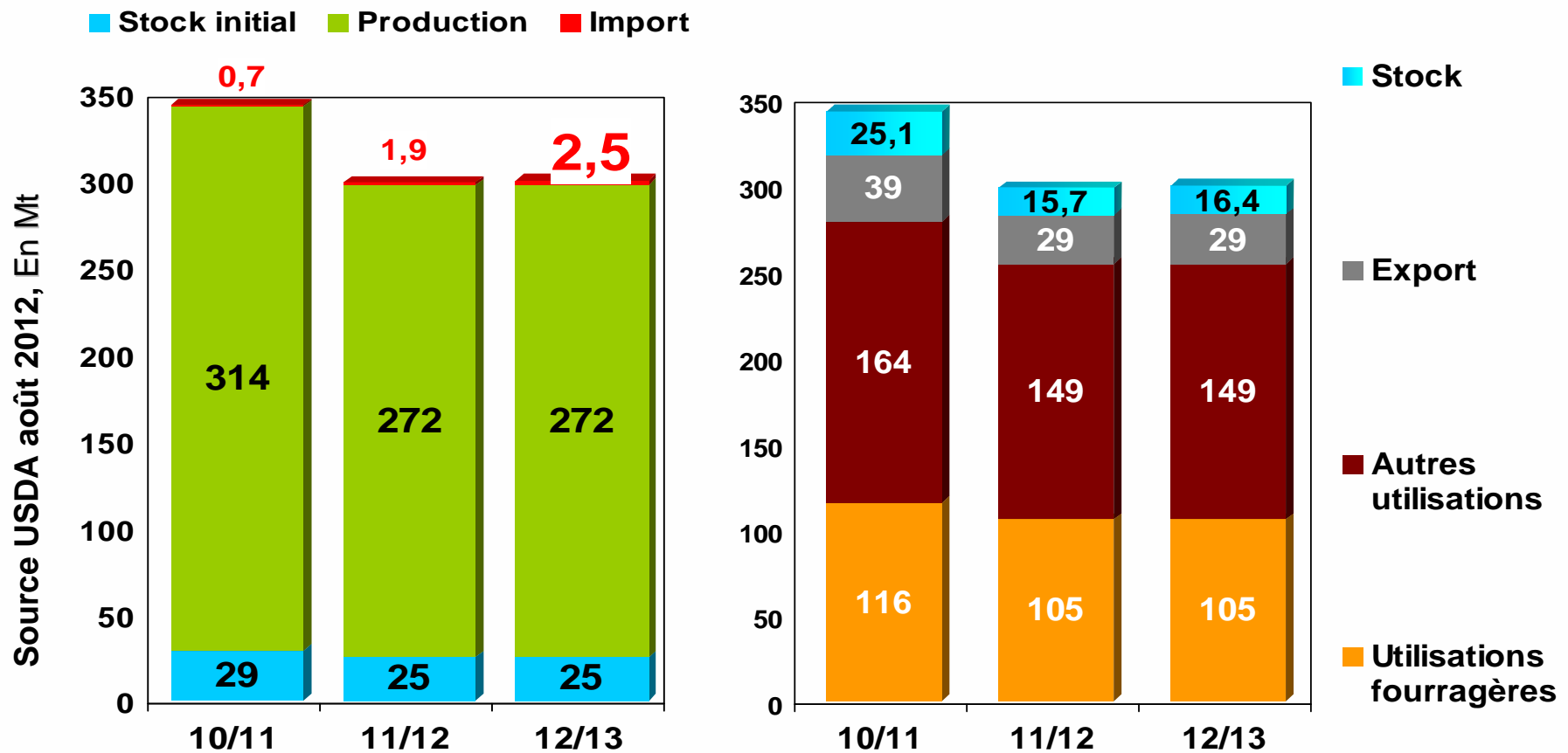
— Blé blanc Australie orientale — Fourrager mer Noire
— Fob Rouen — SRW fob

Bilan mondial maïs 2012/13

Ratio stock sur consommation



Etats-Unis, bilan maïs 2012/13 : un stock attendu de l'ordre de 16 Mt



Production d'éthanol et consommation de maïs

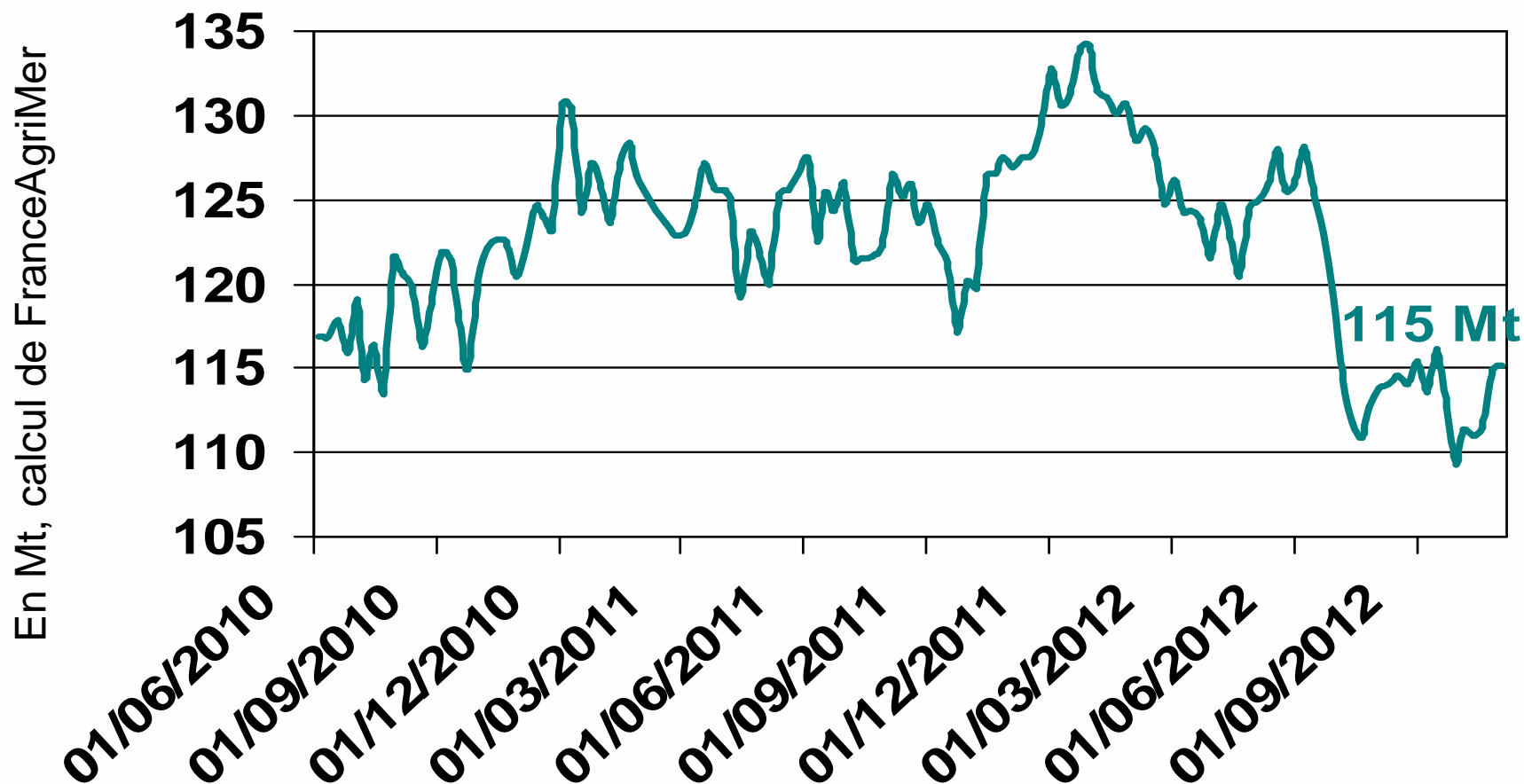
- Volume d'éthanol produit et tonnage de maïs utilisé
- **1 boisseau de maïs => 2,8 gallons d'éthanol**
- Sachant que : 1 boisseau US de maïs vaut 0,02540 tonne (25,4 kg)
- 1 gallon = 3,78541178 litres
donc 2,8 gallons = 10,599 litres
- On a ainsi l'équivalence : 25,4 kg de maïs => 10,599 litres d'éthanol

Soit :

- **2,40 kg de maïs => 1 litre d'éthanol**
- 240 000 tonnes de maïs => 1 Mhl d'éthanol ou encore **0,24 Mt maïs = 1Mhl éthanol**

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

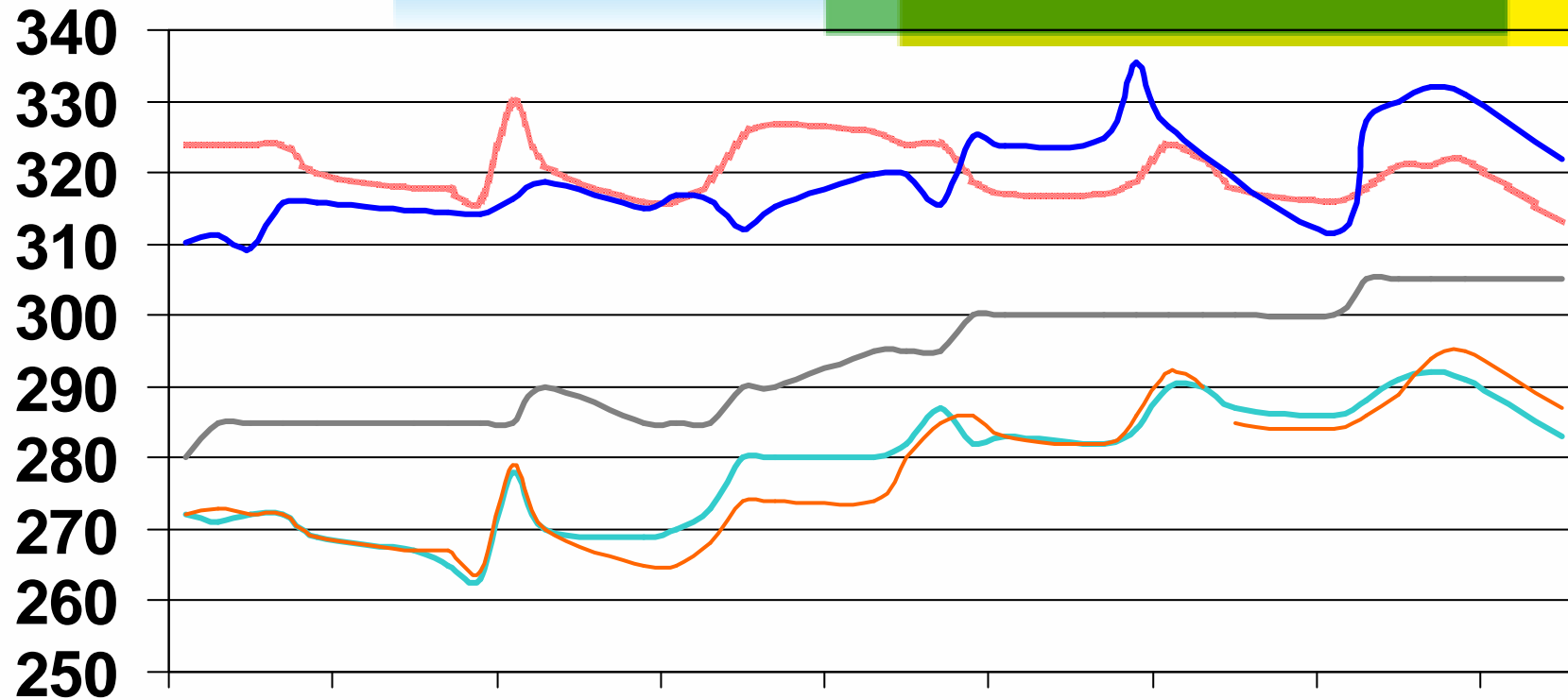
Moyenne depuis le début de la campagne 121 Mt (127 Mt en 2011)



Cône Sud : situation des semis

- Précipitations abondantes fin octobre avec environ 7 MHa sous les eaux et des conséquences sur les semis :
- Maïs : Début nov. 40% des surfaces semées contre 57% l'an dernier. Si les retards persistent la surface de maïs pourrait baisser à 3 Mha soit une production de 21-22MT (selon la Bolsa de Buenos Aires)
- Soja : Début nov. 4% des surfaces semées contre 13% l'an dernier

Cours du maïs



— Argentina Feed Up River

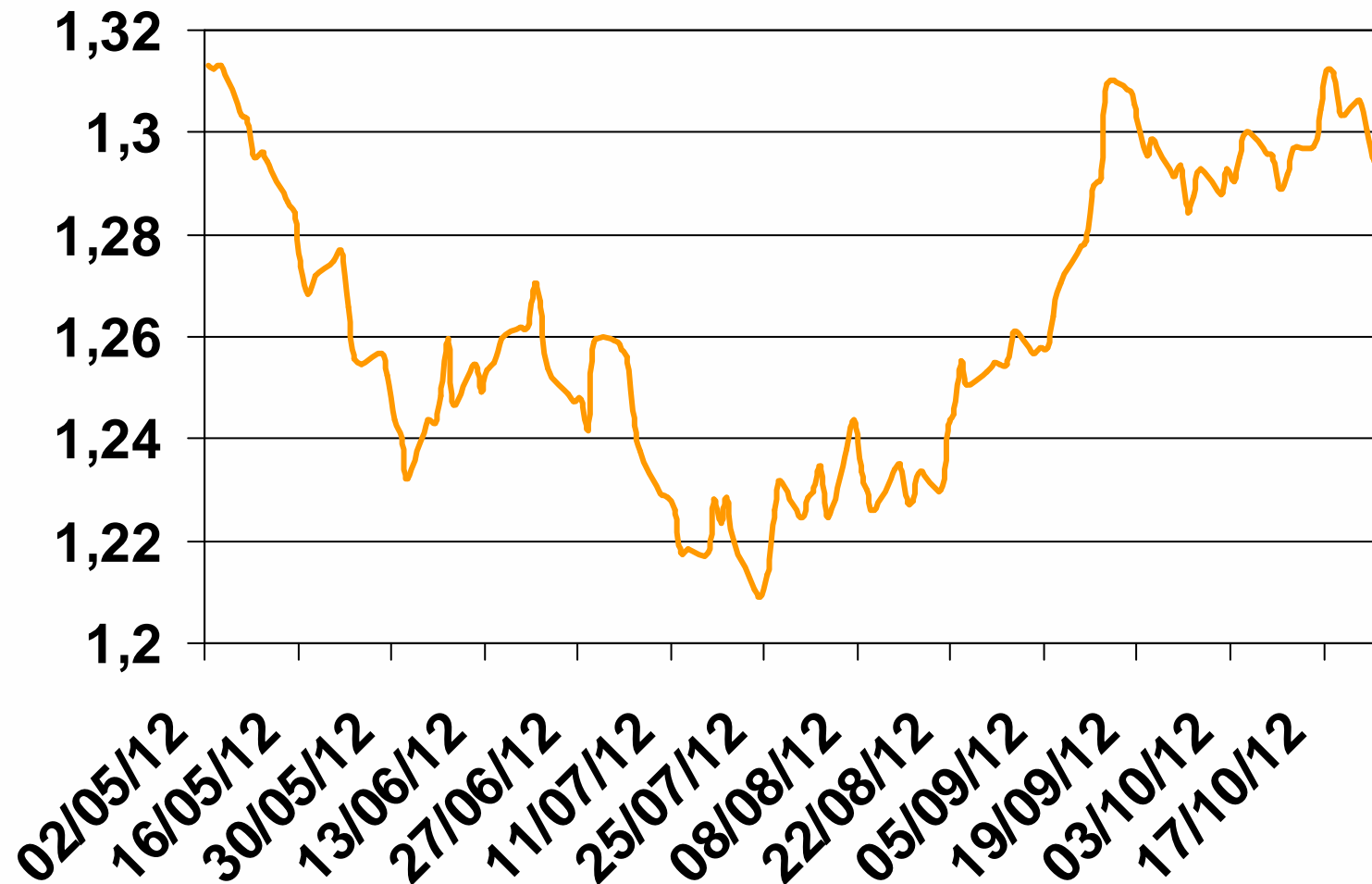
— Black Sea Feed

— Brazil feed Paranaguá

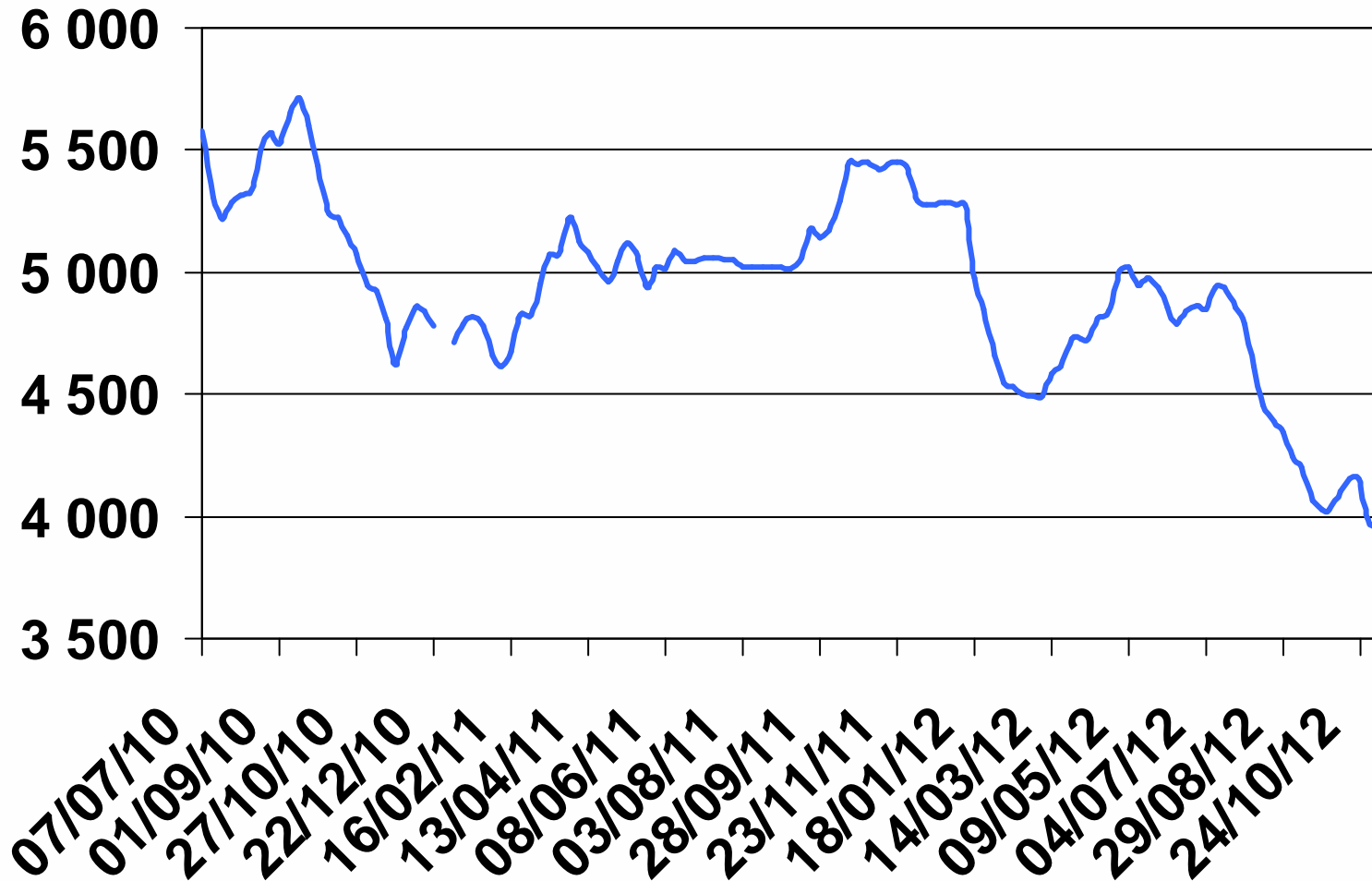
— US 3YC Gulf

— Fob Bordeaux

Taux de change €/ \$



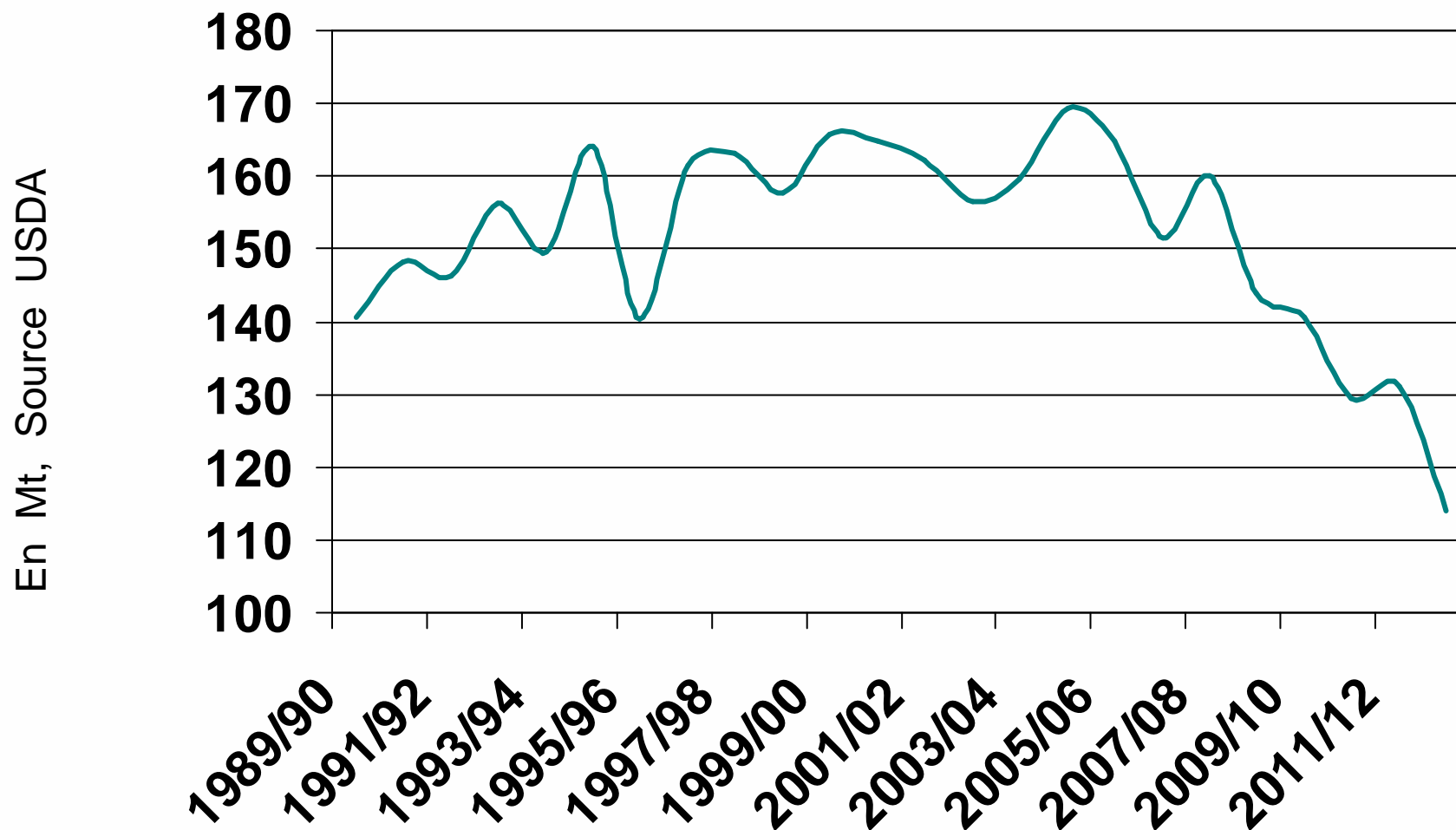
Frets céréaliers



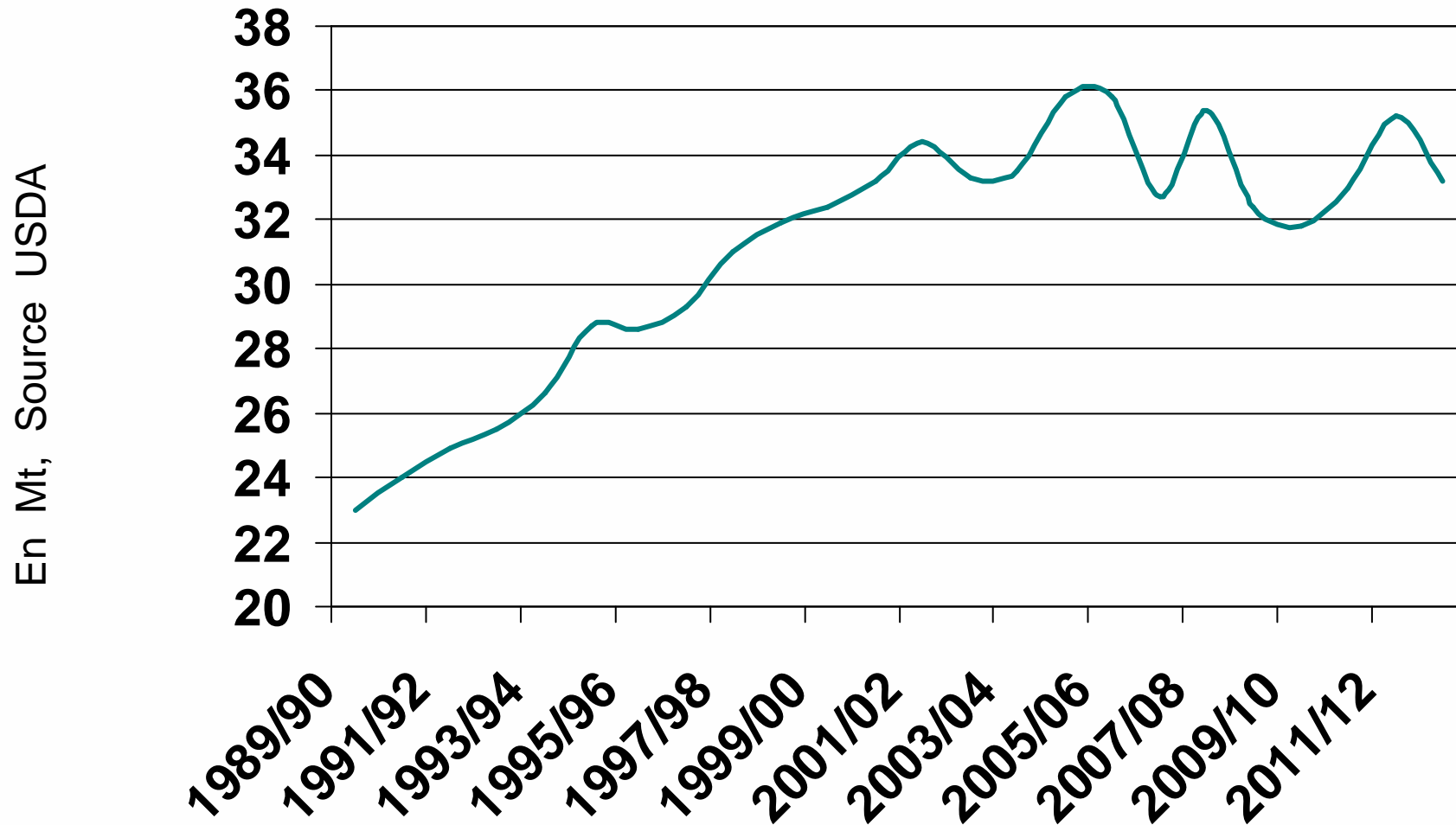


**Focus Alimentation animale
aux Etats Unis**

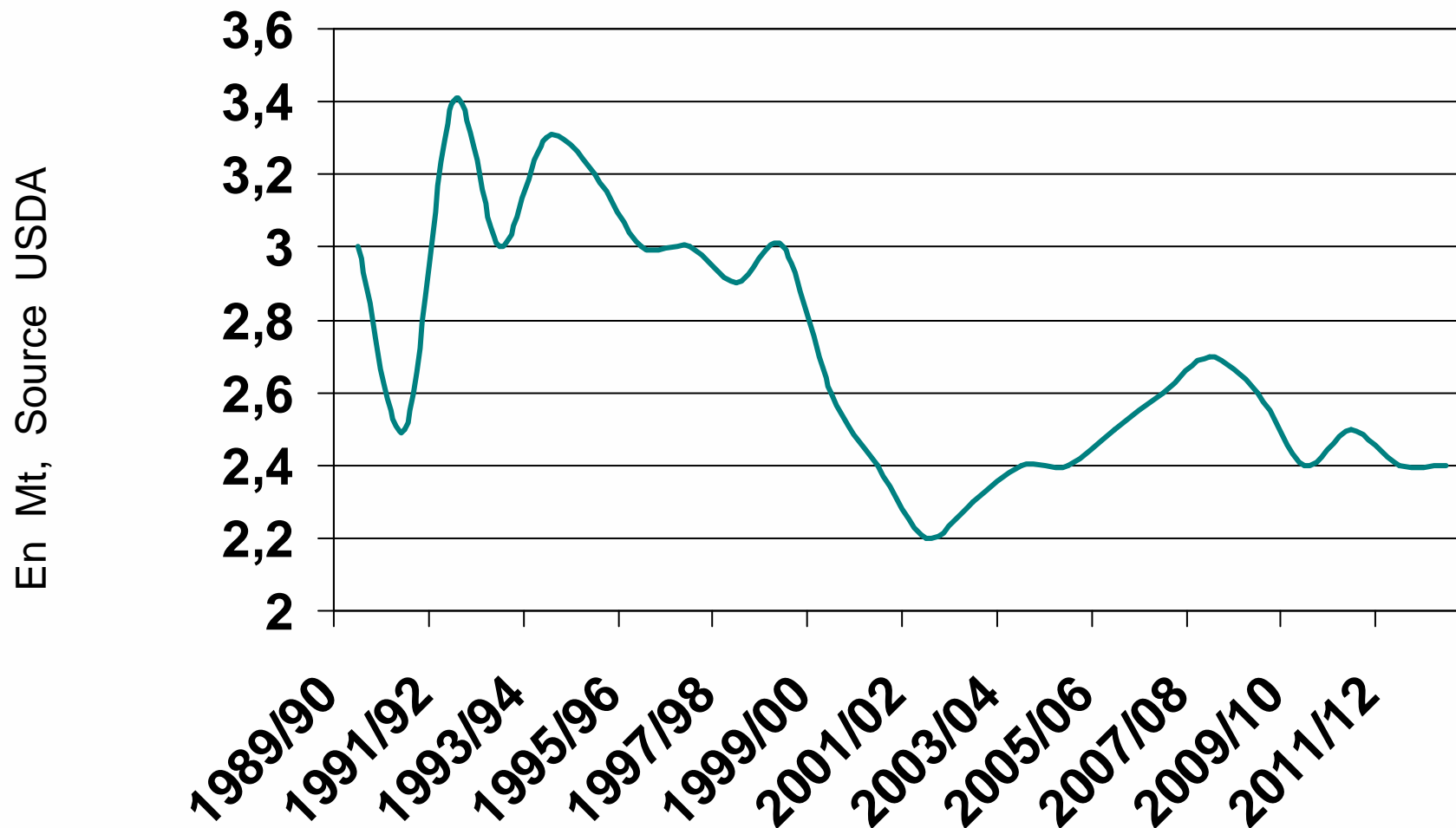
Utilisations des matières premières énergétiques



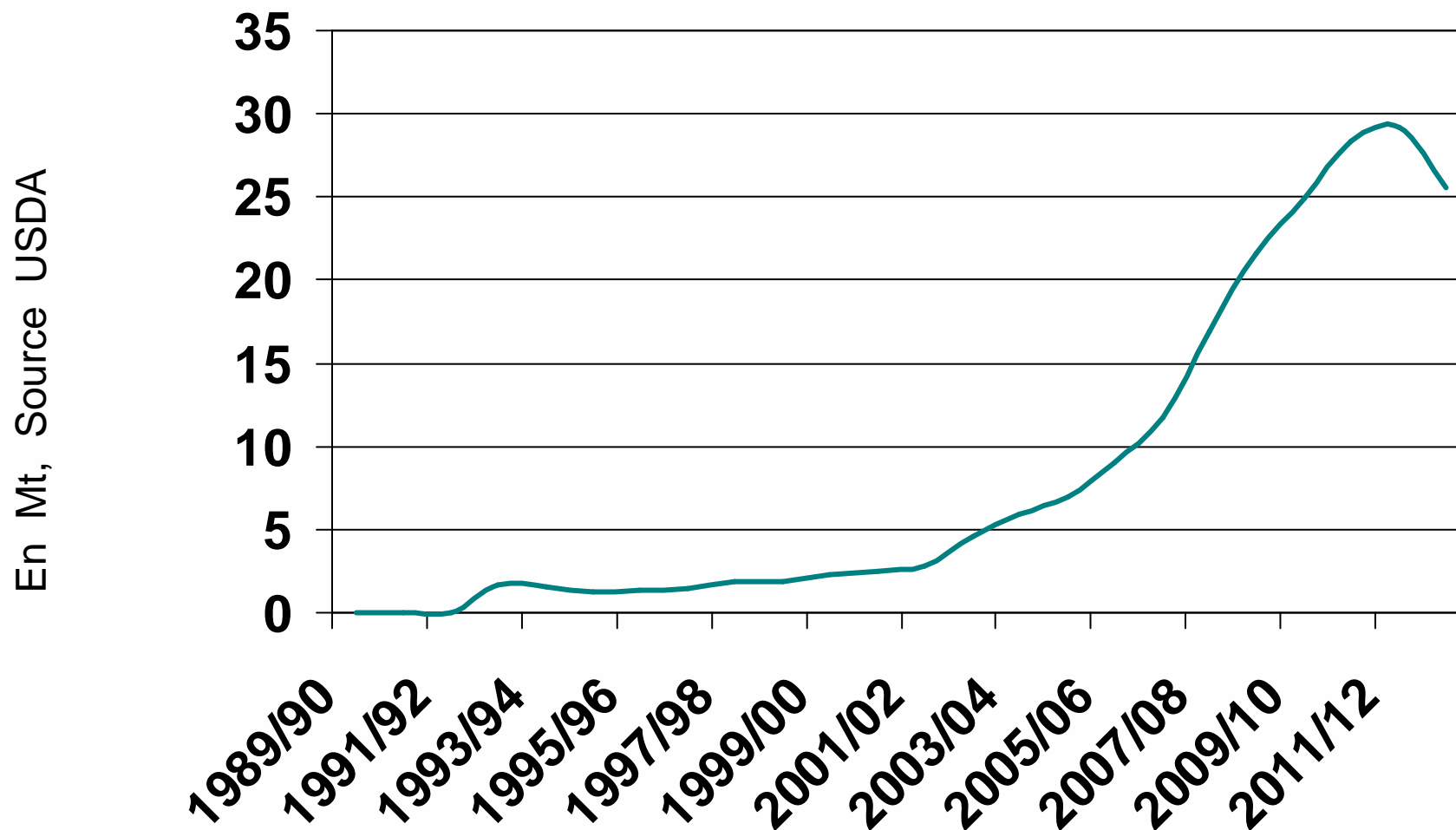
Utilisations de tourteaux



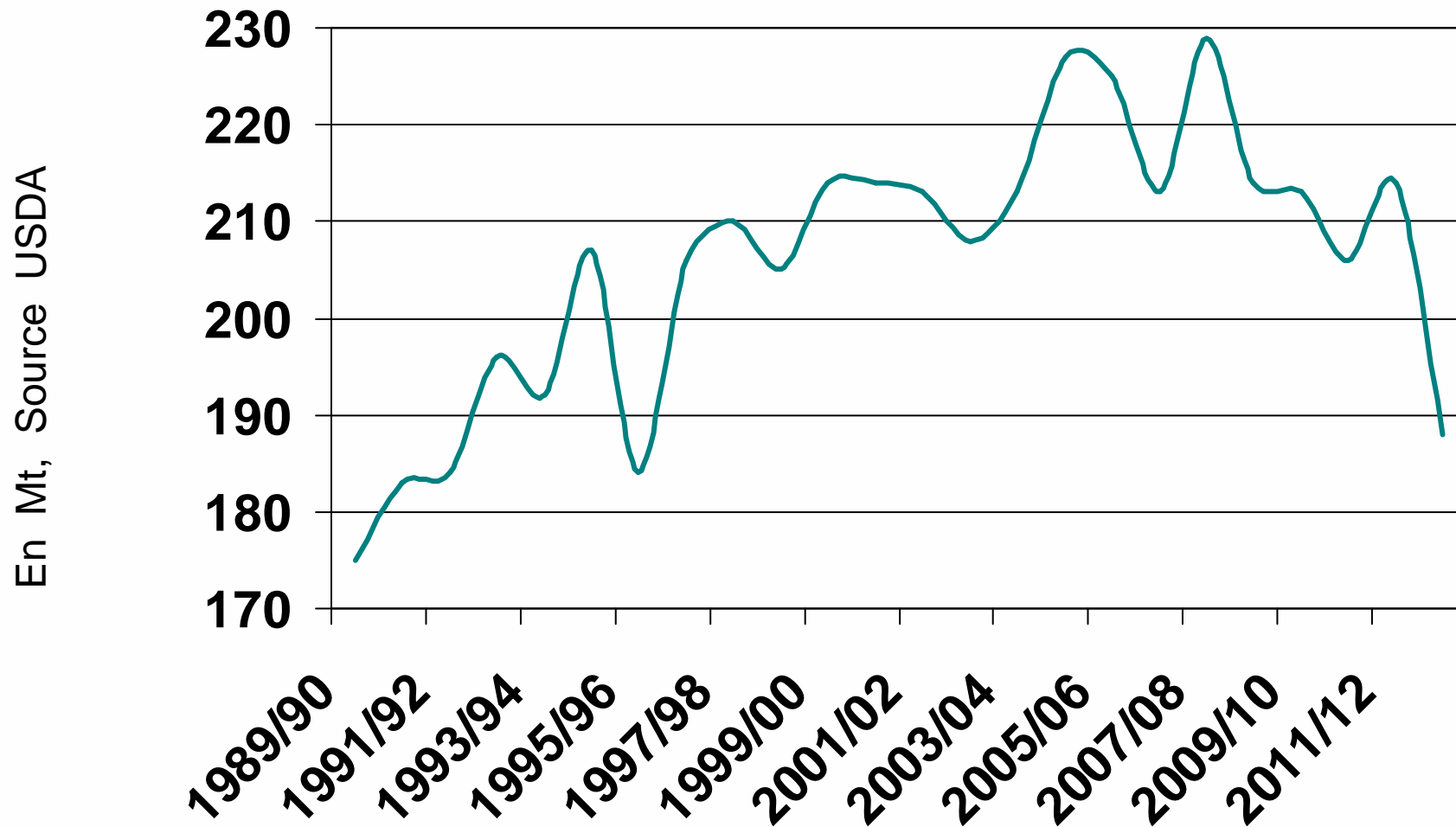
Utilisations de protéines animales



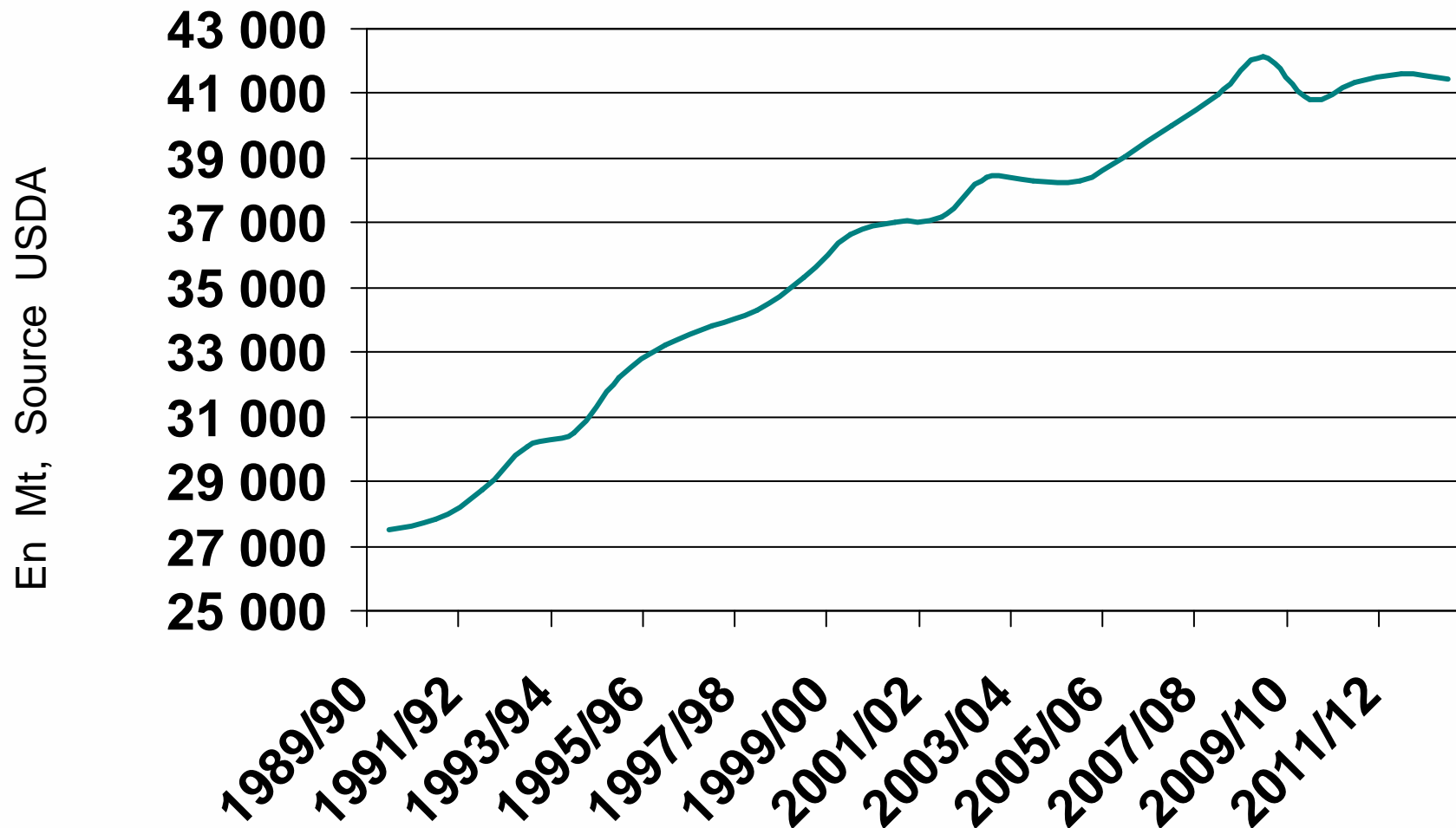
Utilisations des drèches d'éthanol



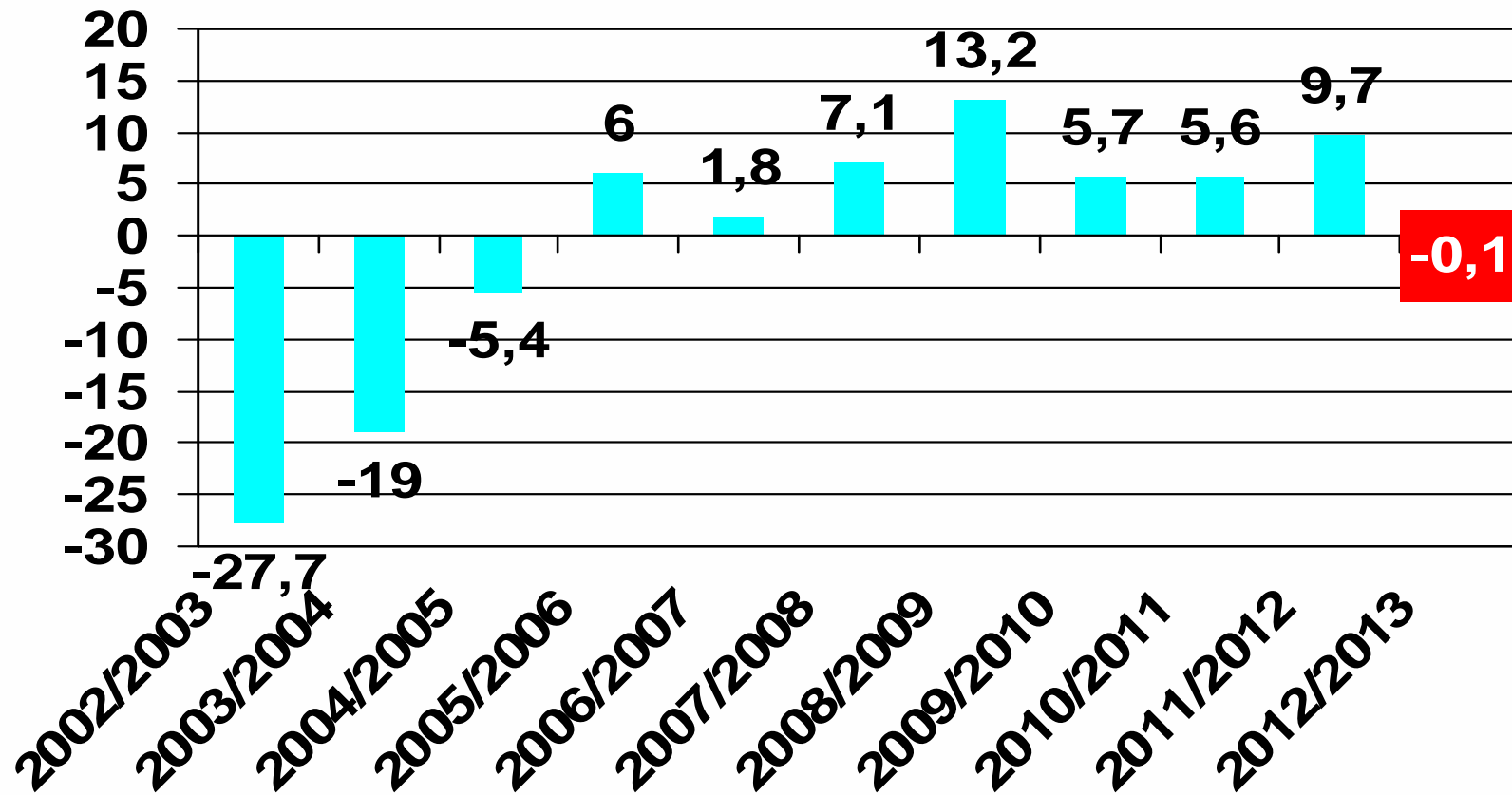
Toutes matières premières confondues



Evolution de la production de viandes

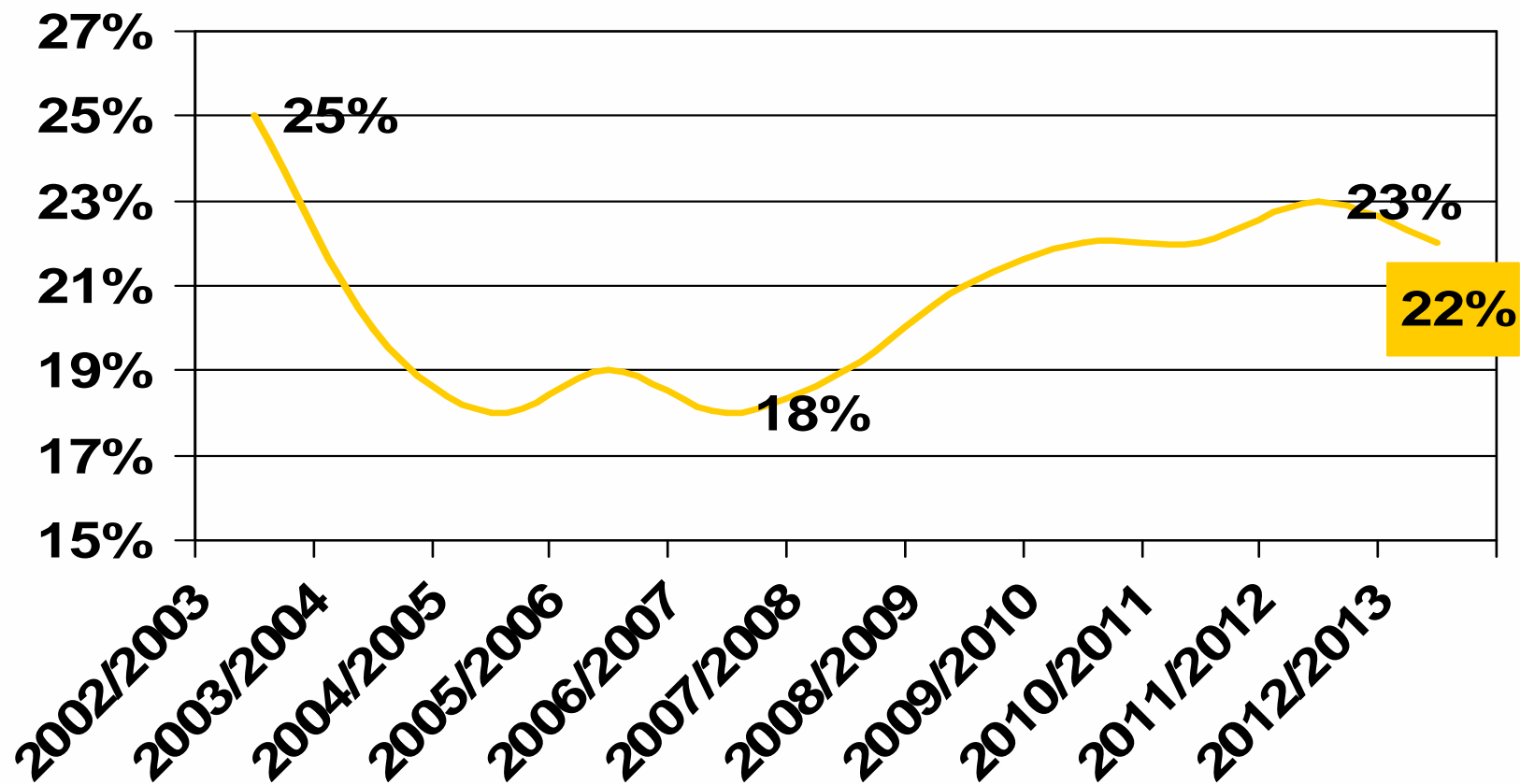


Stock de riz



Source USDA

Riz ratio stock sur consommation

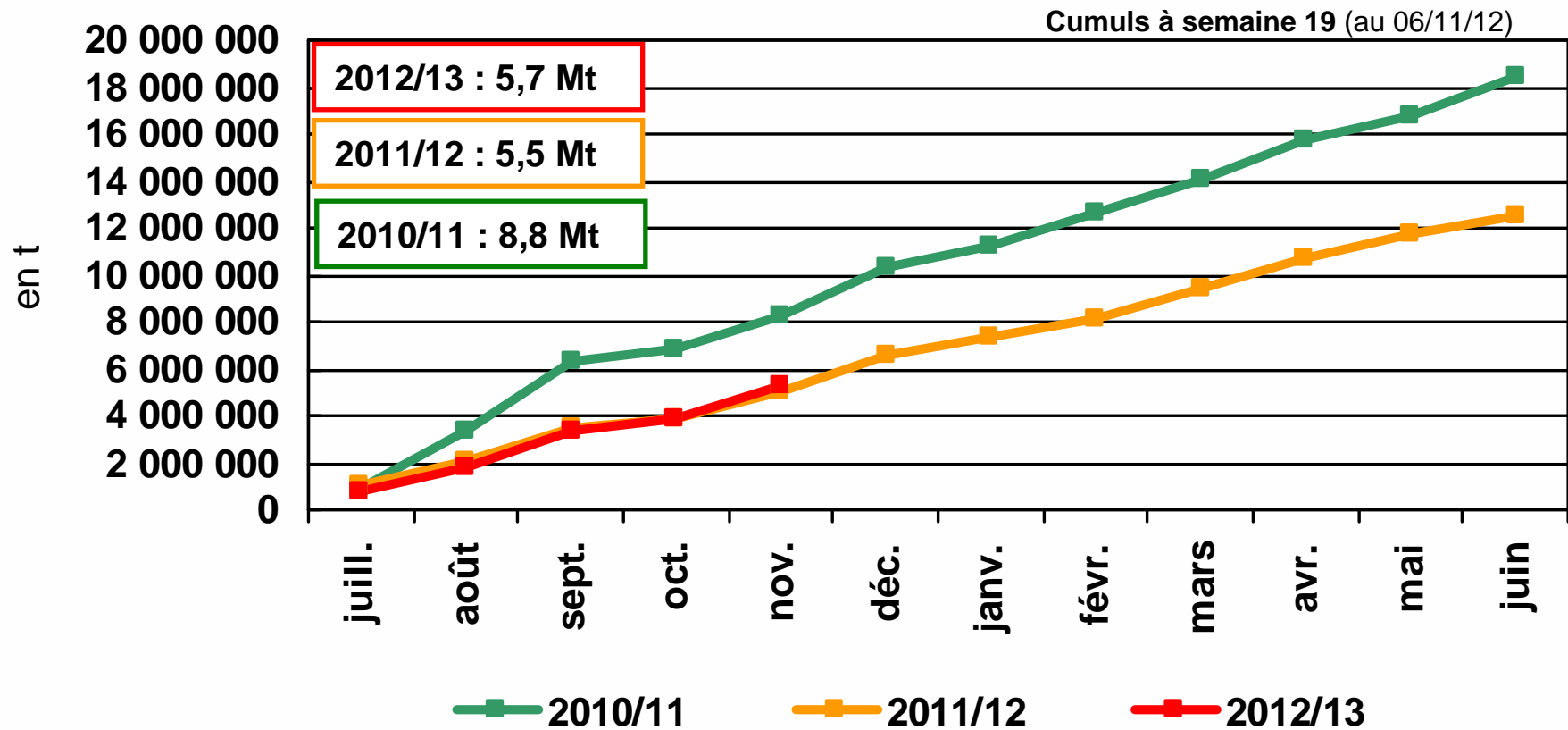


Source USDA



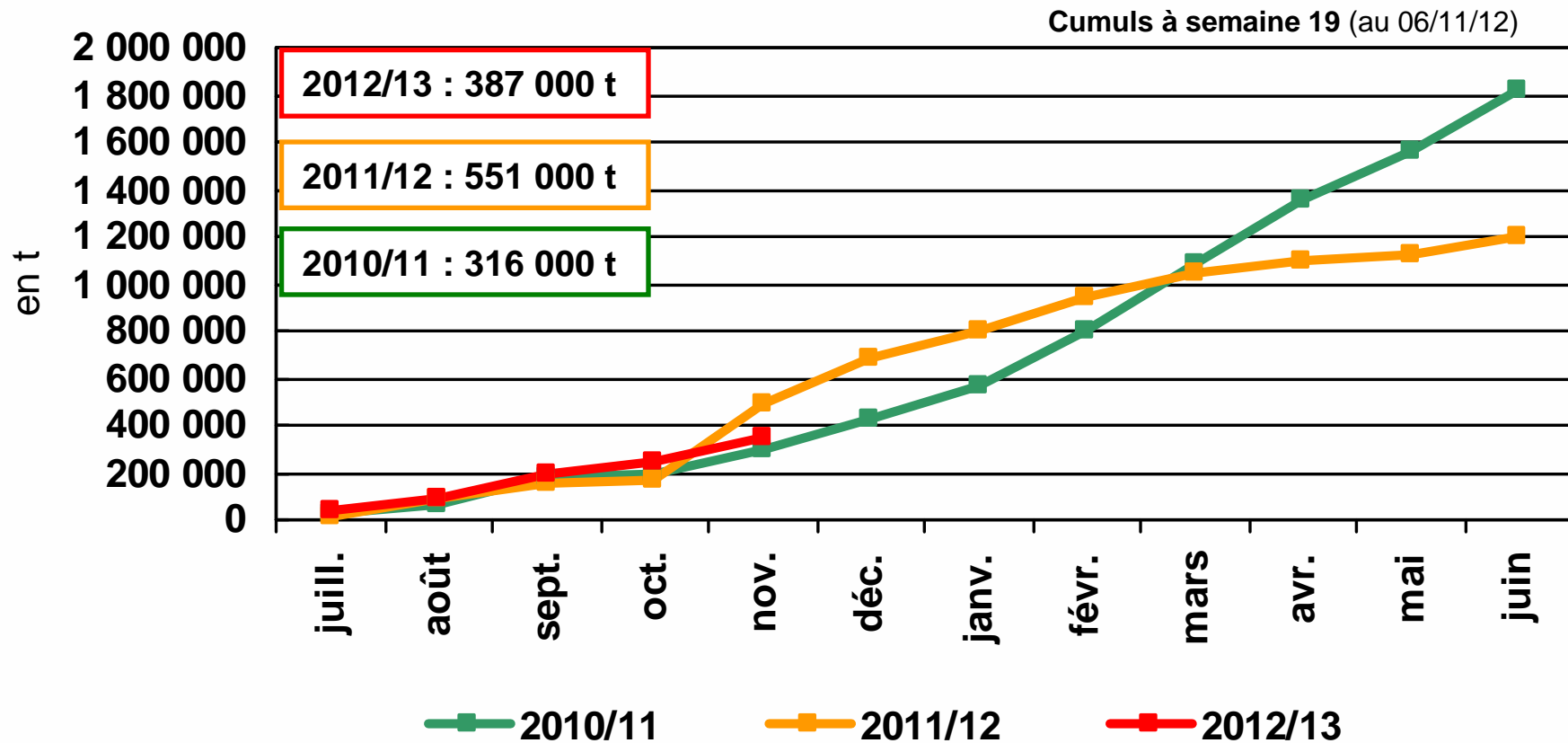
Marché européen

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



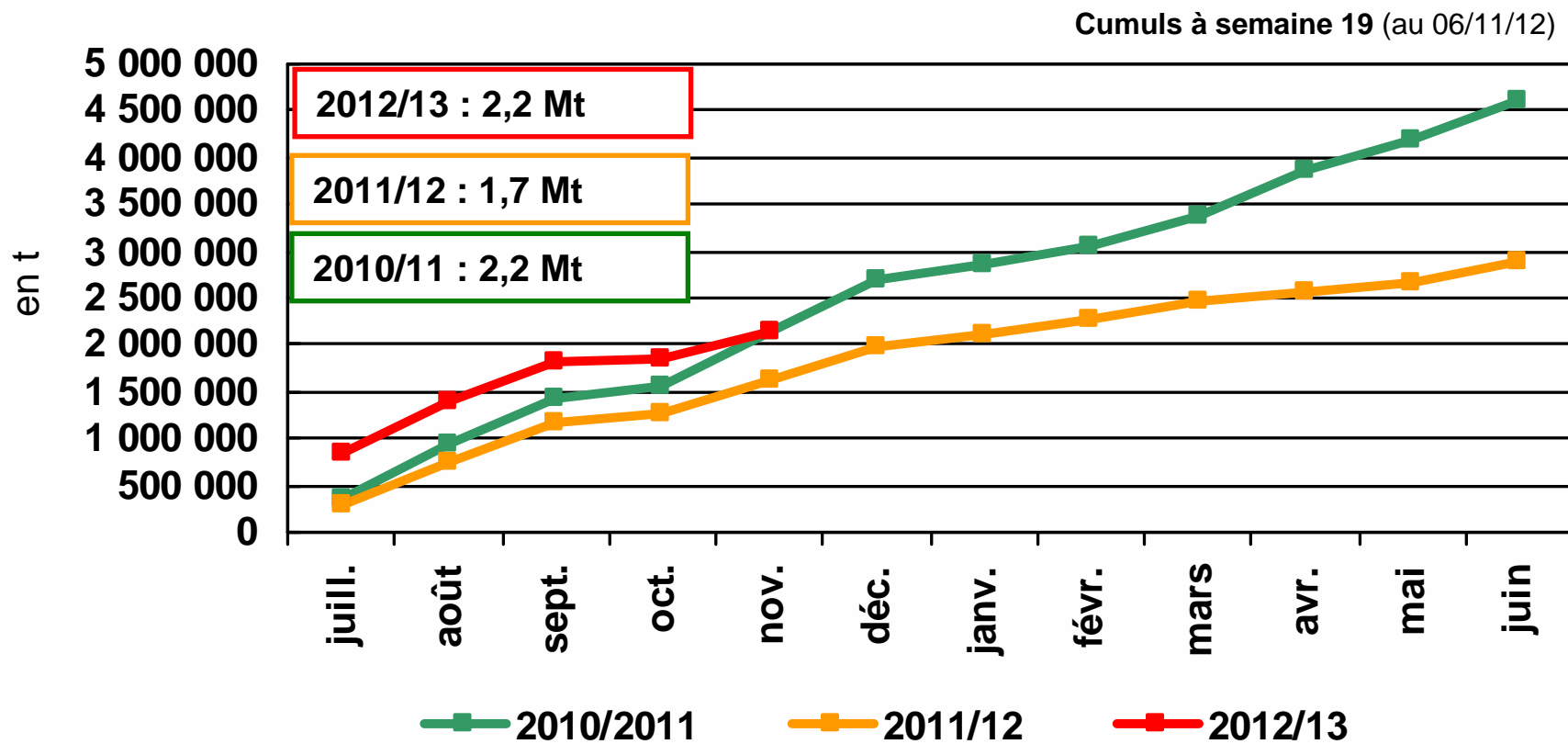
Source : Commission européenne

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



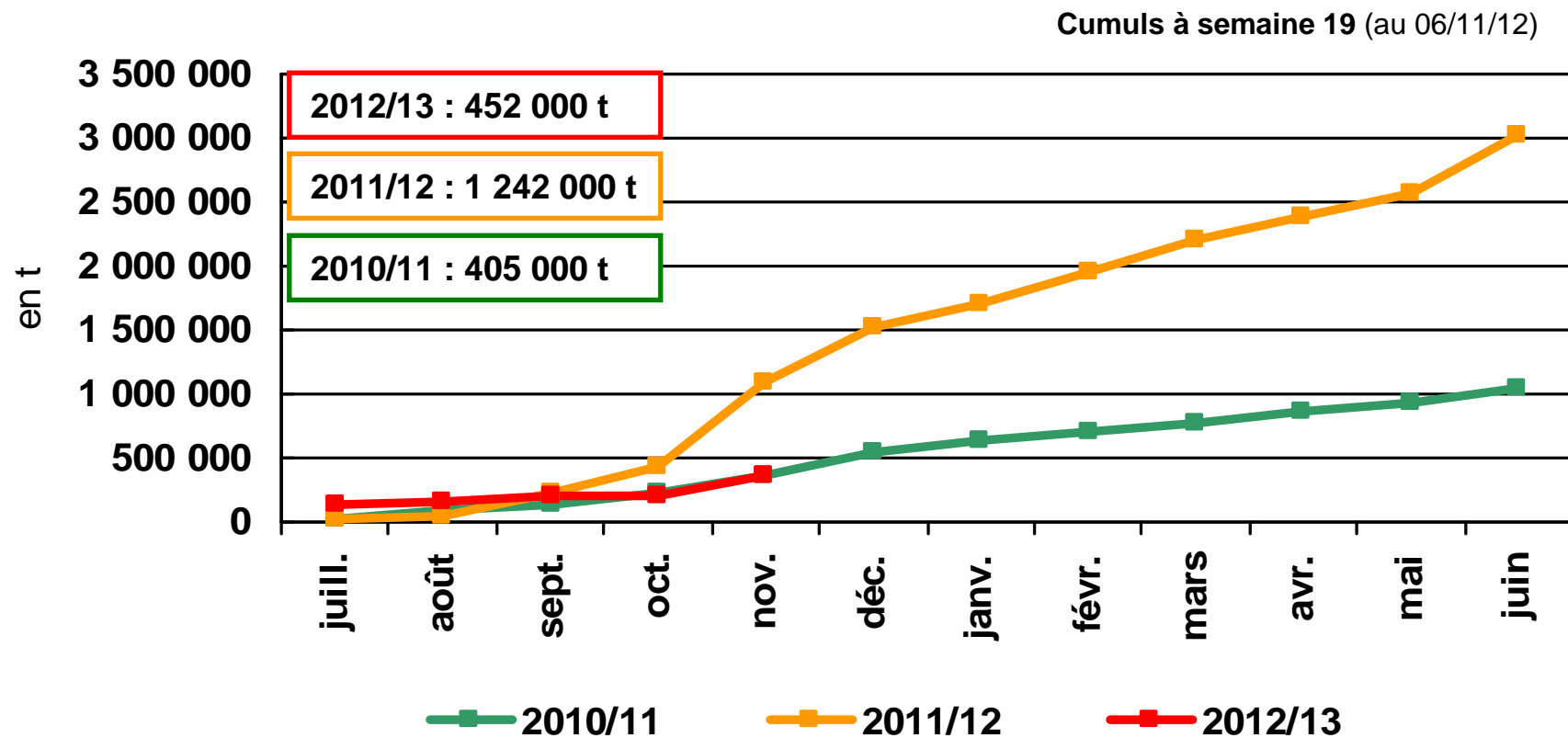
Source : Commission européenne

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



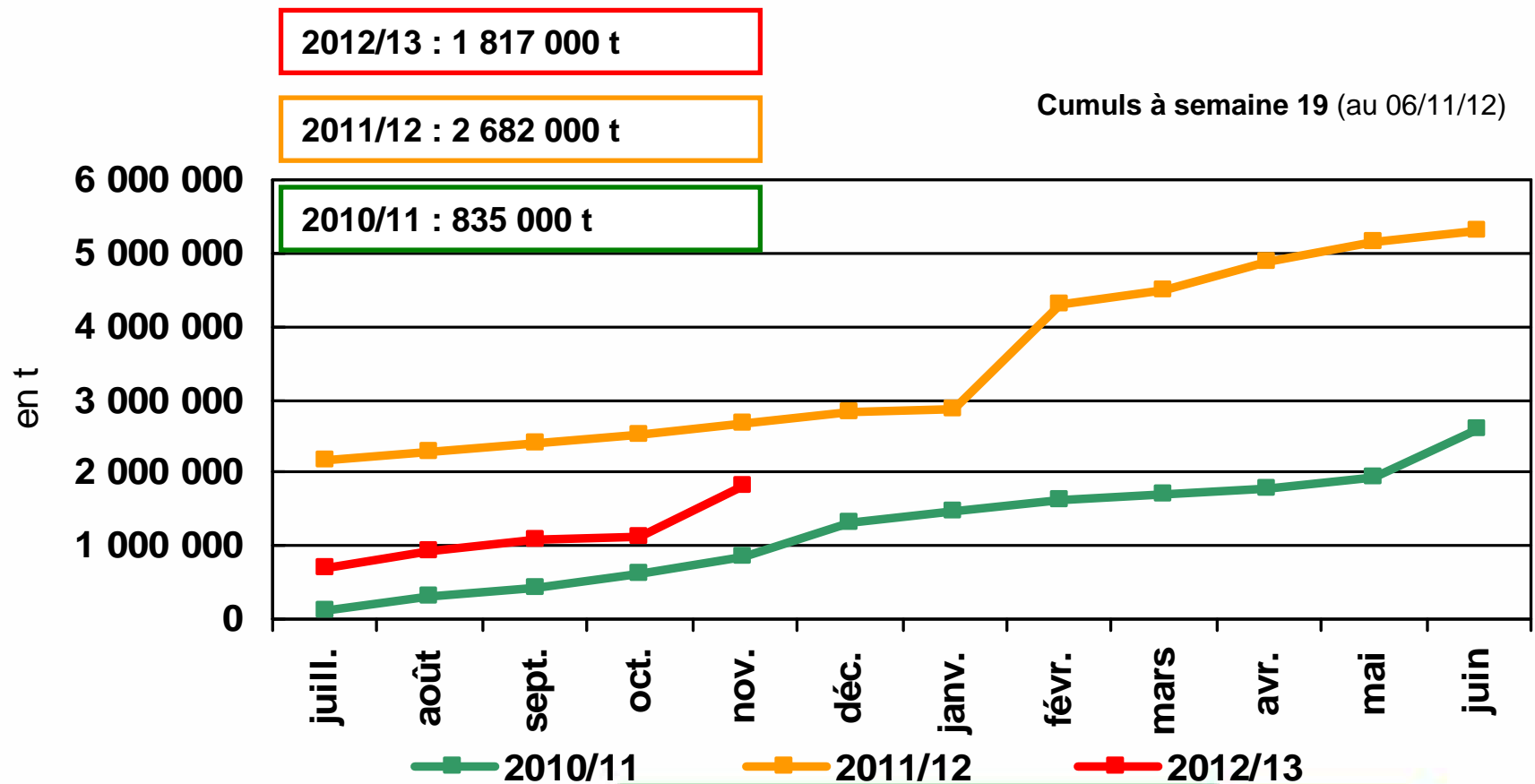
Source : Commission européenne

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

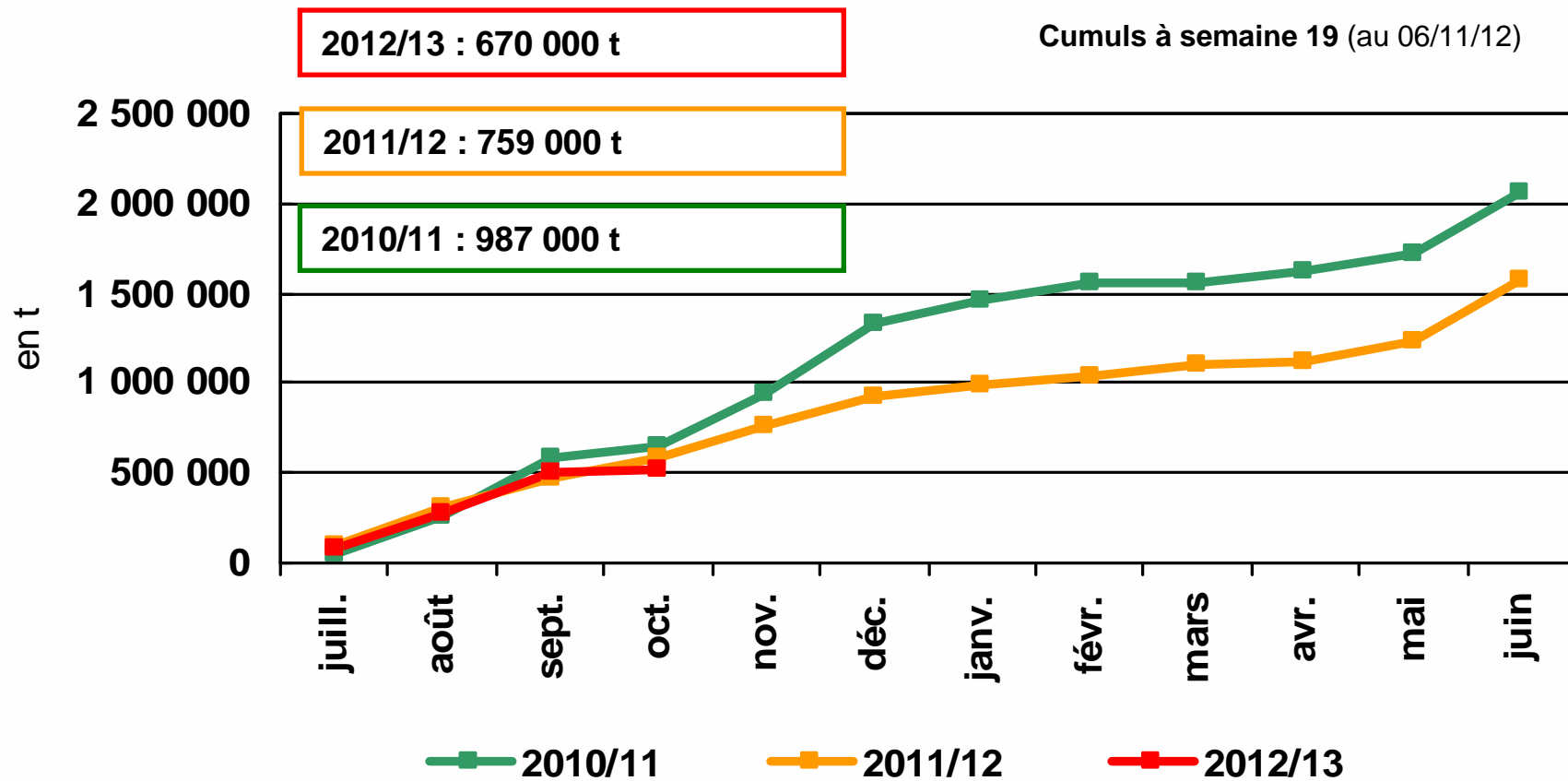


Source : Commission européenne

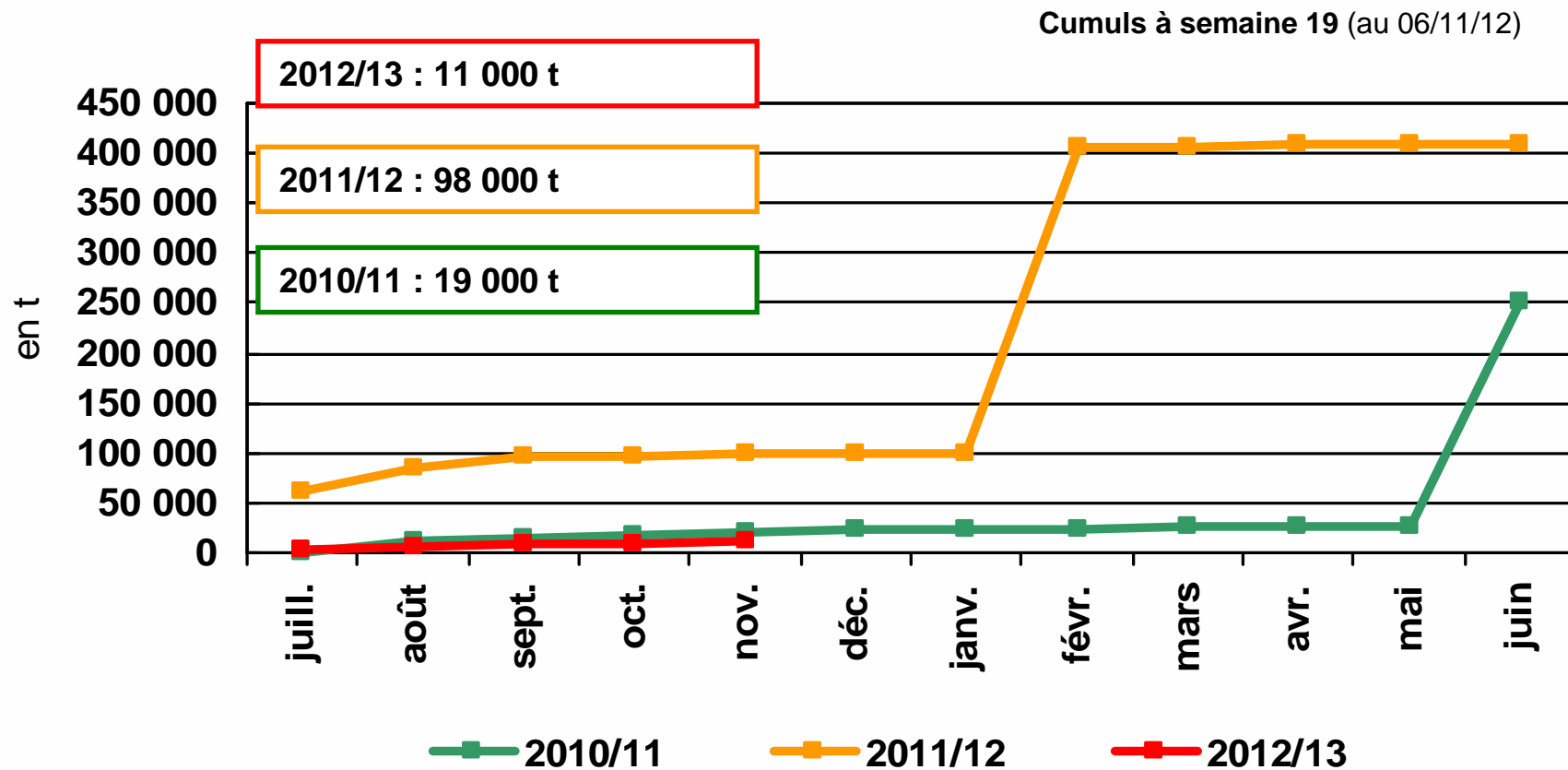
Blé tendre : certificats à l'importation délivrés dans l'UE



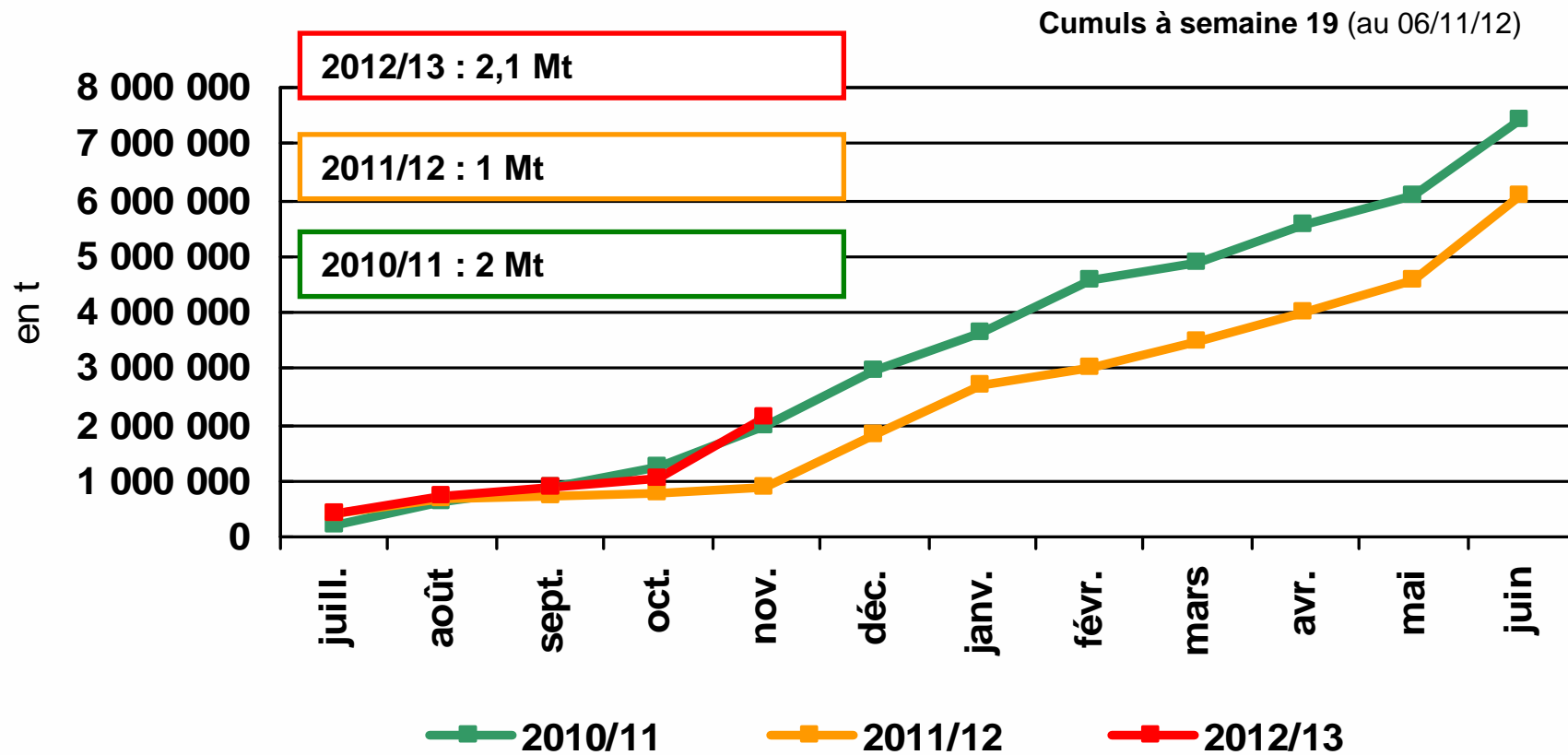
Blé dur : certificats à l'importation délivrés dans l'UE



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

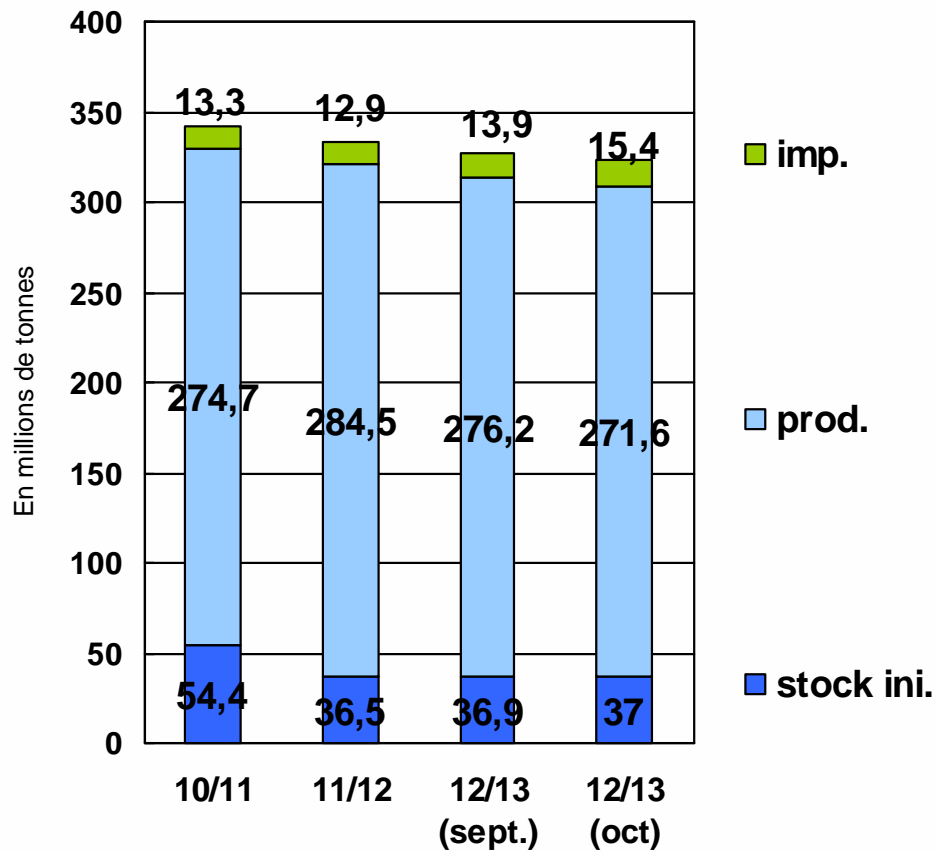


Maïs : certificats à l'importation délivrés dans l'UE

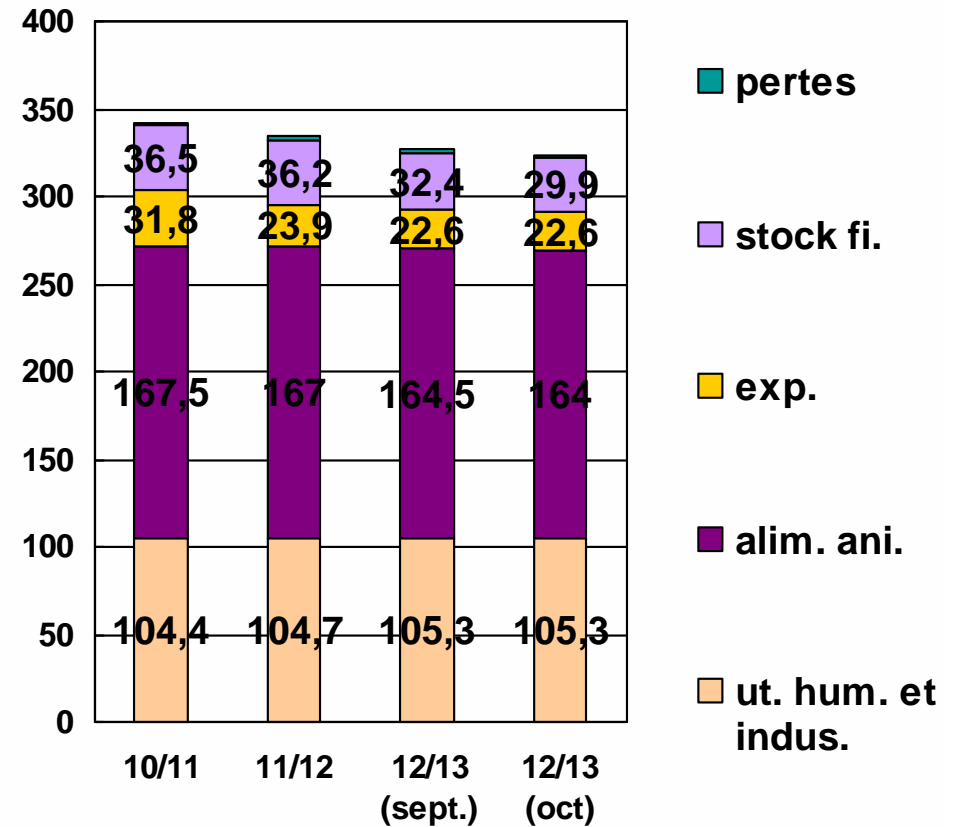


UE - bilan toutes céréales

Total dispo 2012/13 : 324 Mt

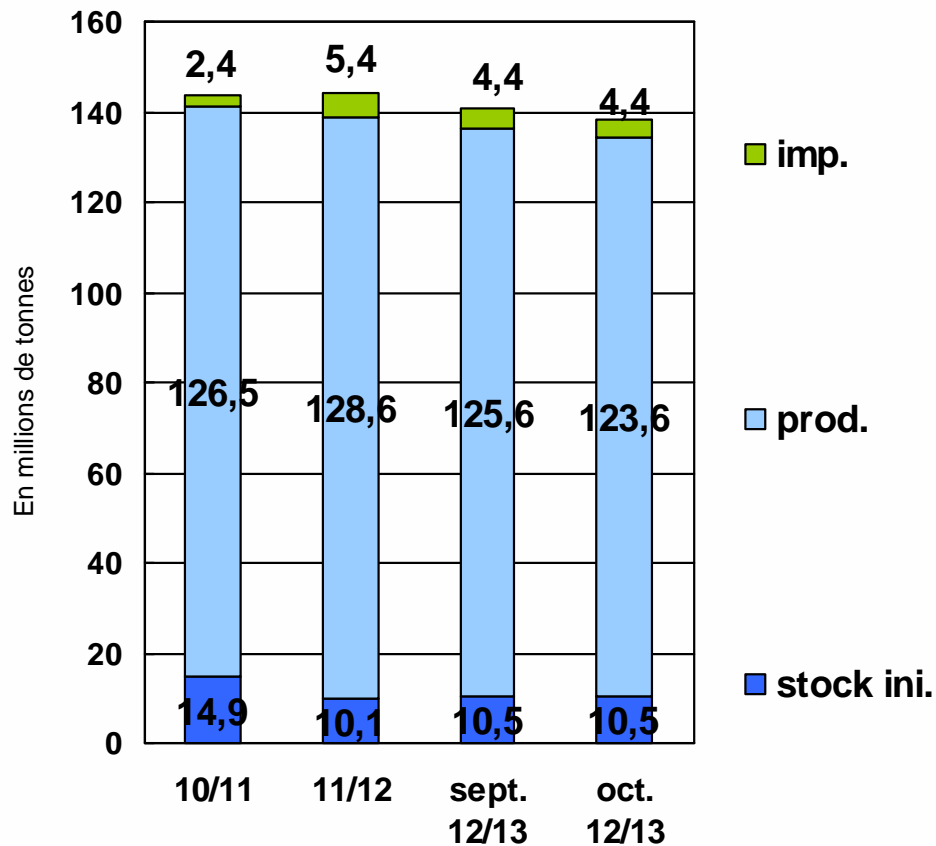


Total utilisation 2012/13 : 324 Mt

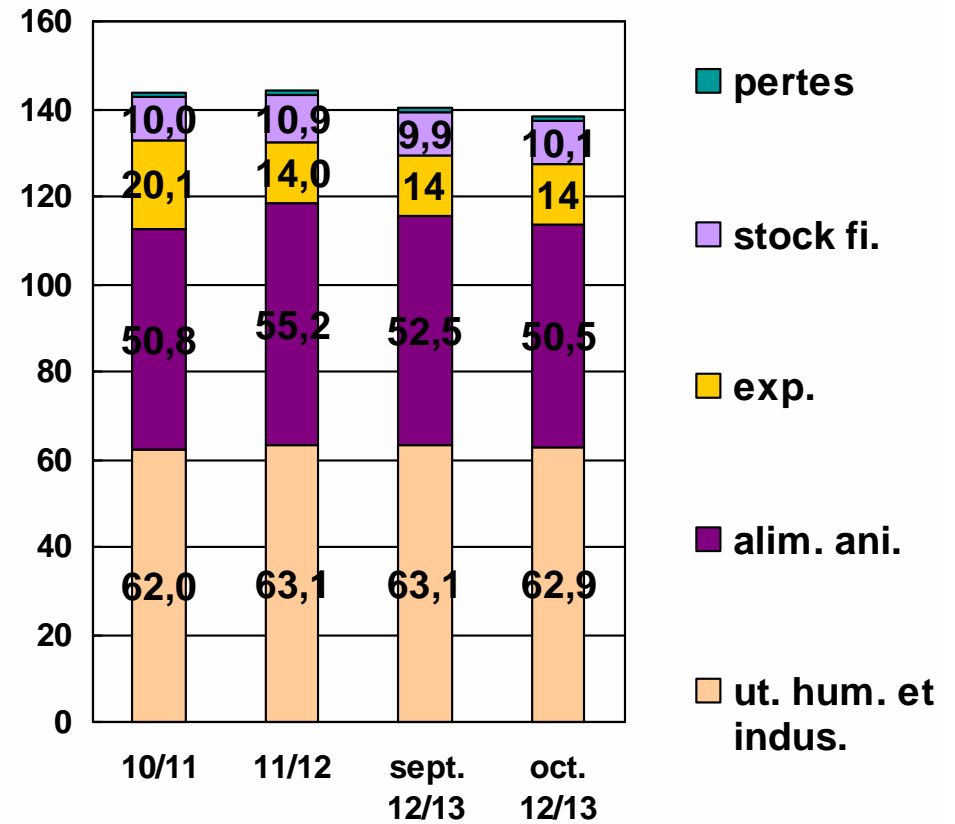


UE - bilan blé tendre

Total dispo 2012/13 : 138,5 Mt

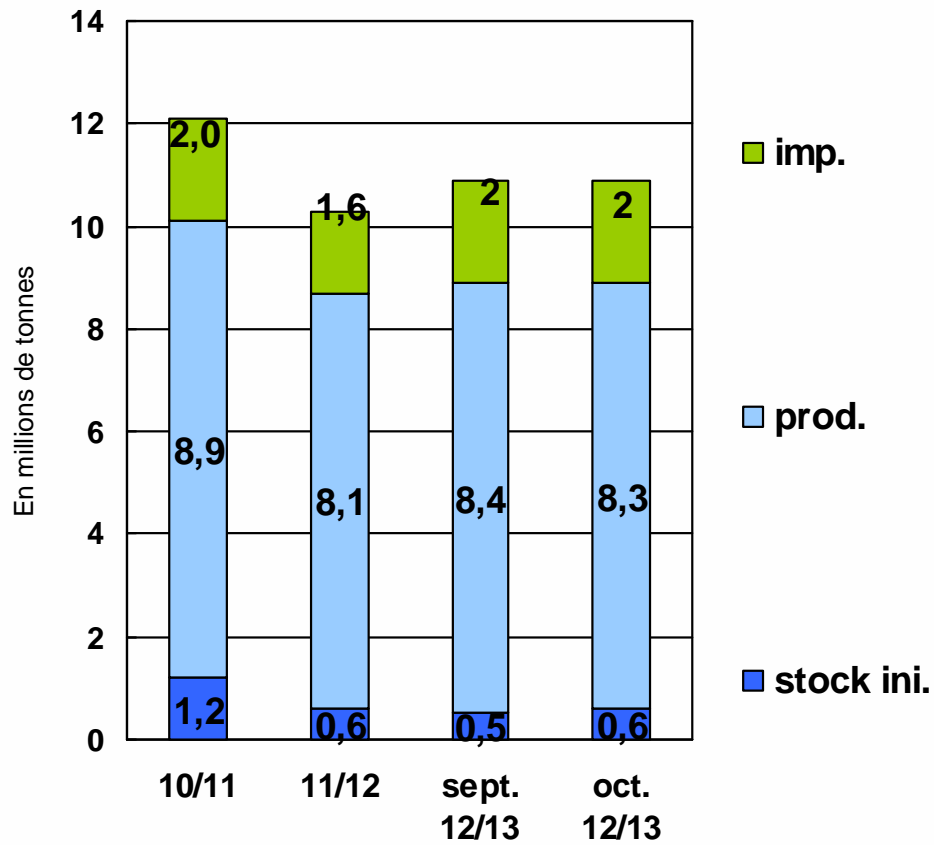


Total utilisation 2012/13 : 138,5 Mt

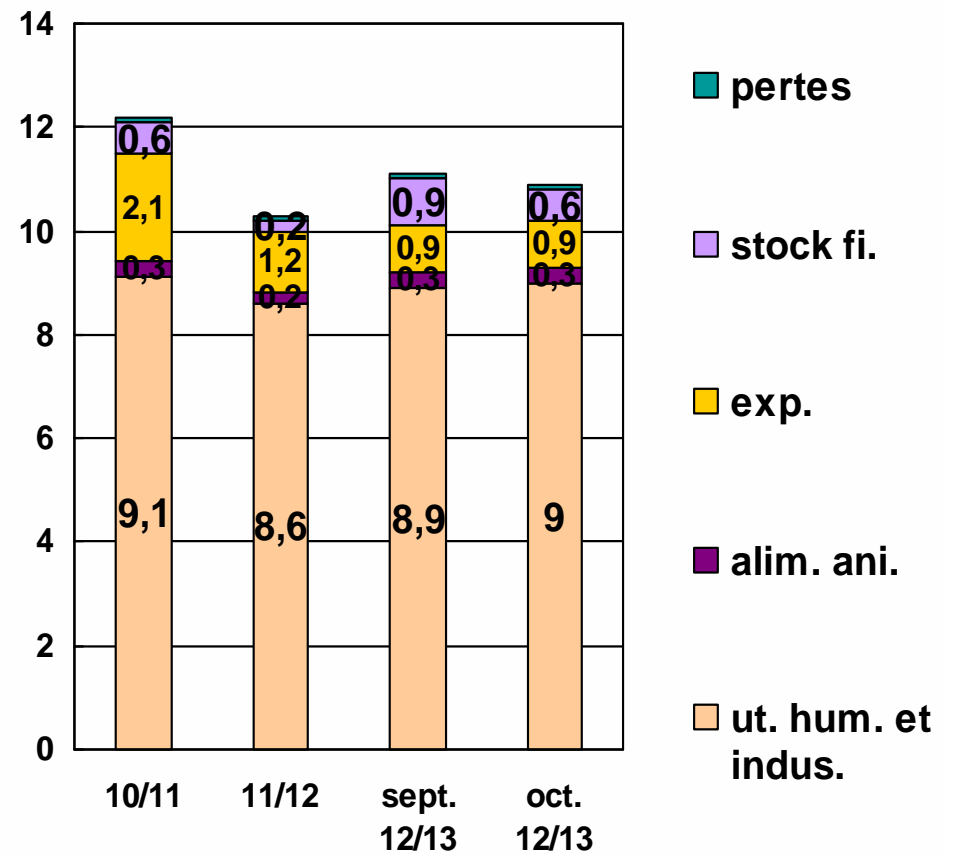


UE - bilan blé dur

Total dispo 2012/13 : 10,9 Mt

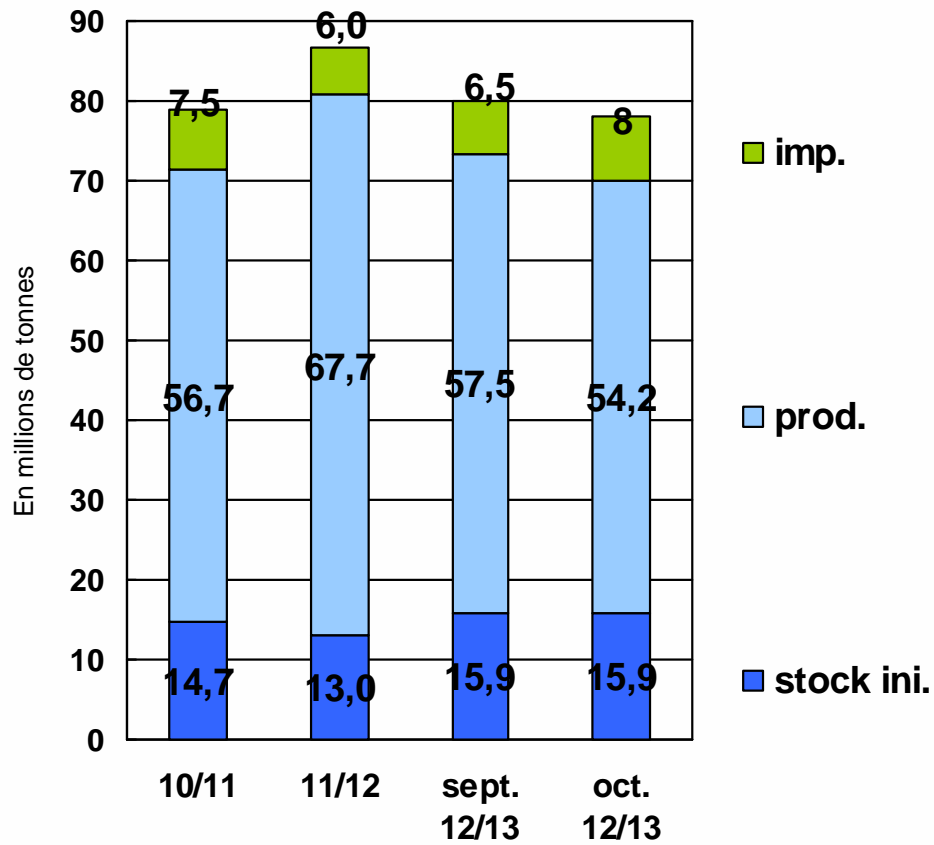


Total utilisation 2012/13 : 10,9 Mt

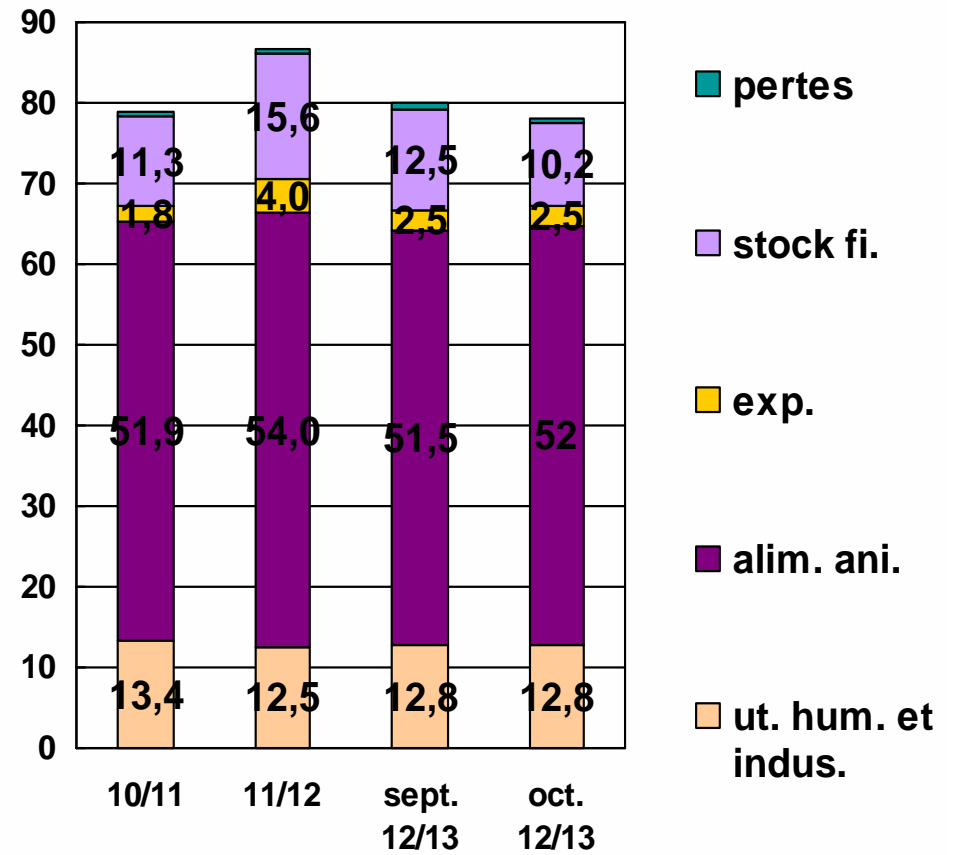


UE - bilan maïs

Total dispo 2012/13 : 78,1 Mt

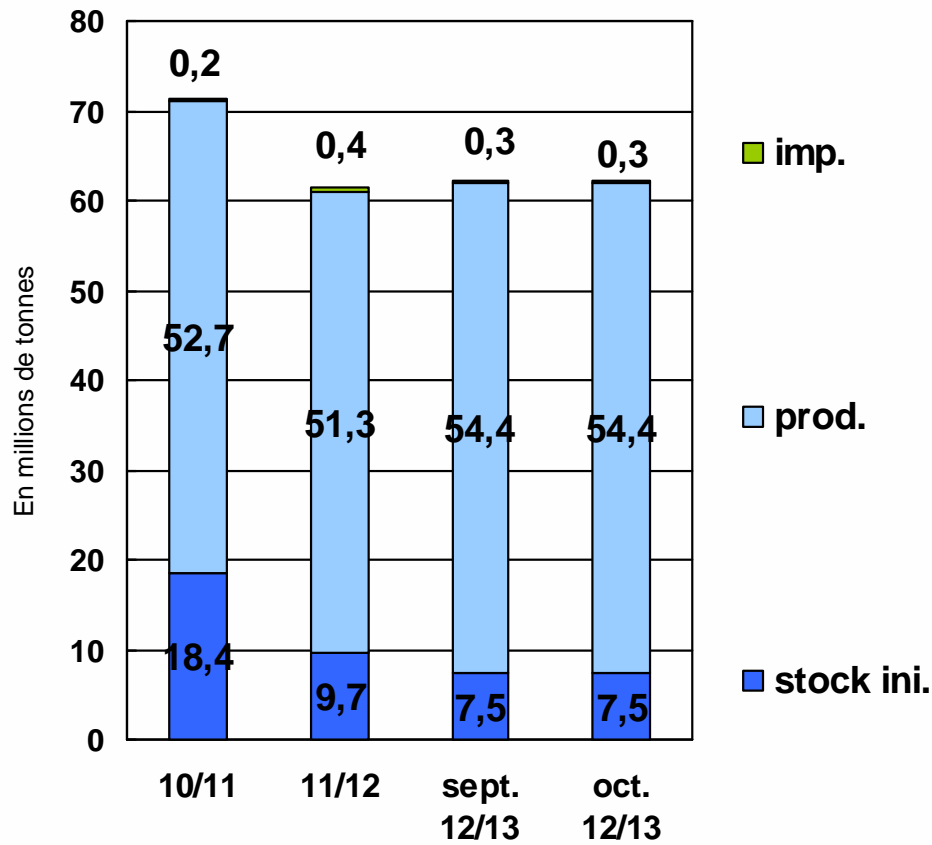


Total utilisation 2012/13 : 78,1 Mt

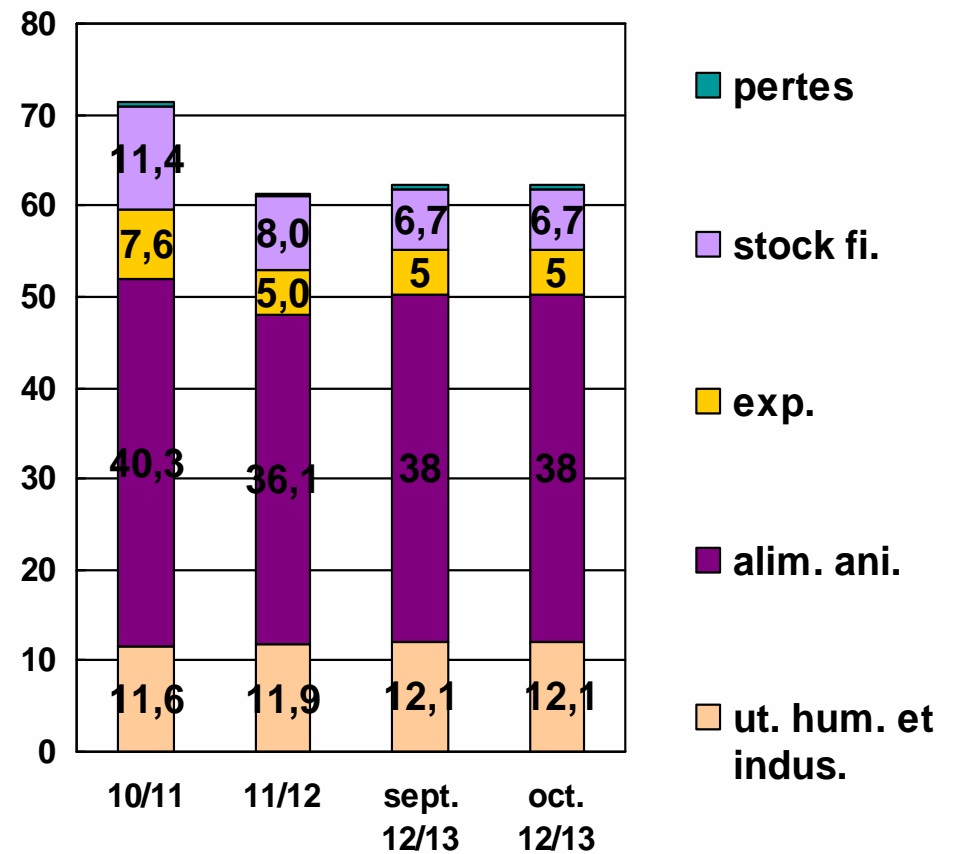


UE - bilan orge

Total dispo 2012/13 : 62,1 Mt



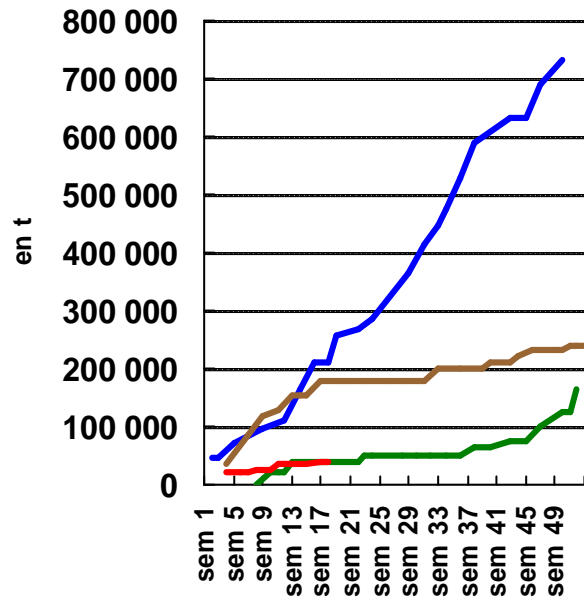
Total utilisation 2012/13 : 62,1 Mt



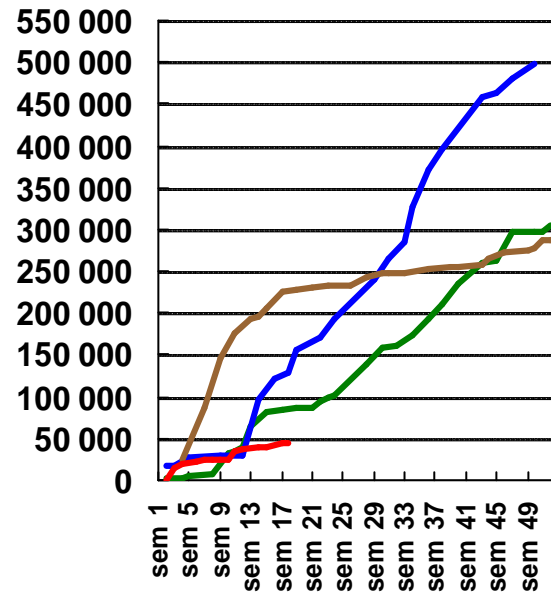
IMPORTATIONS DE "PRODUITS DE SUBSTITUTION DES CEREALES" (PSC)

Certificats délivrés, en cumul depuis le début de campagne

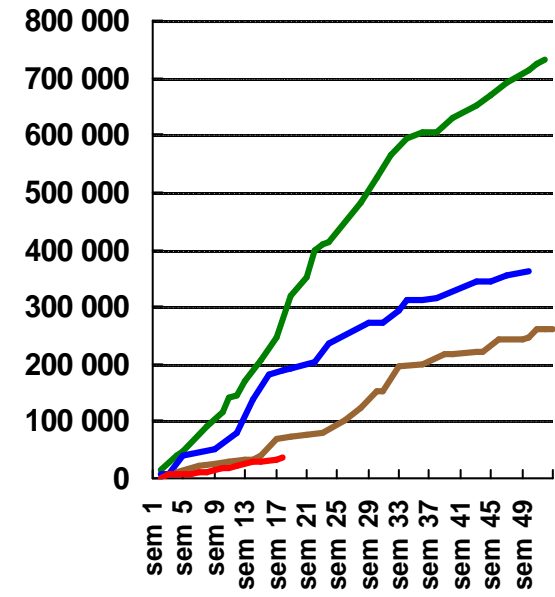
Corn gluten feed



Drèches de brasserie

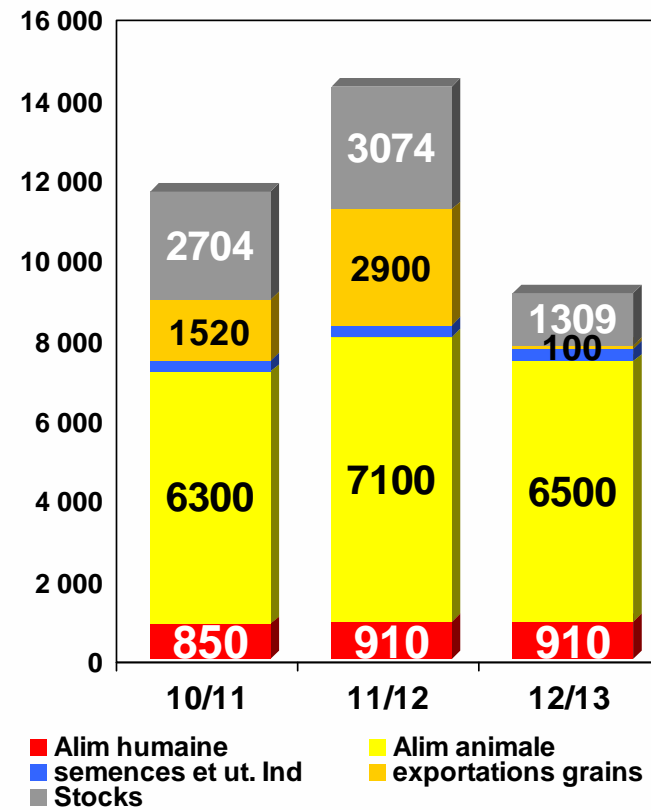
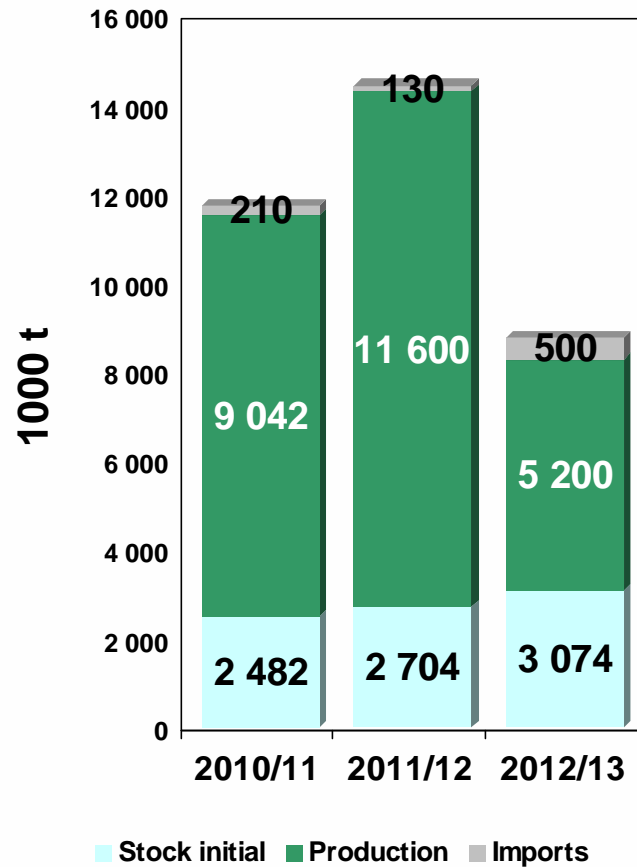


Pulpes d'agrumes

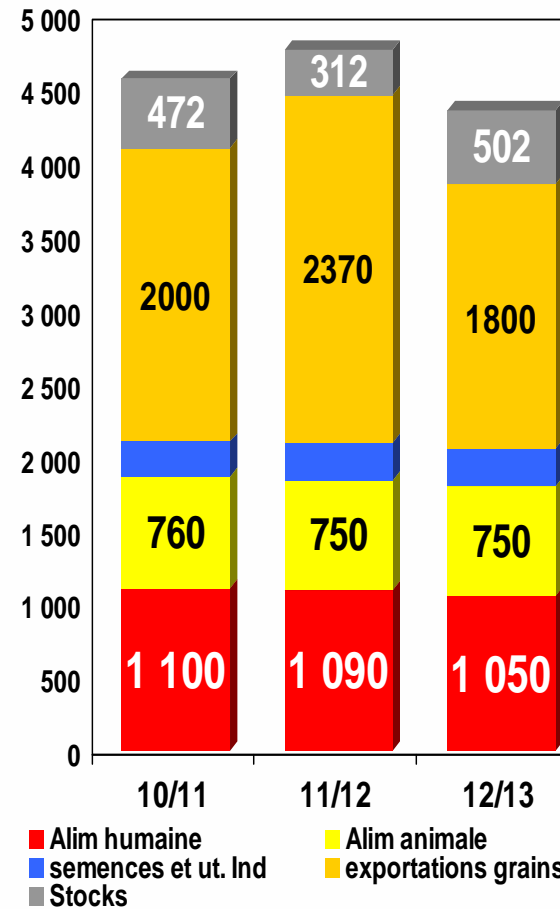
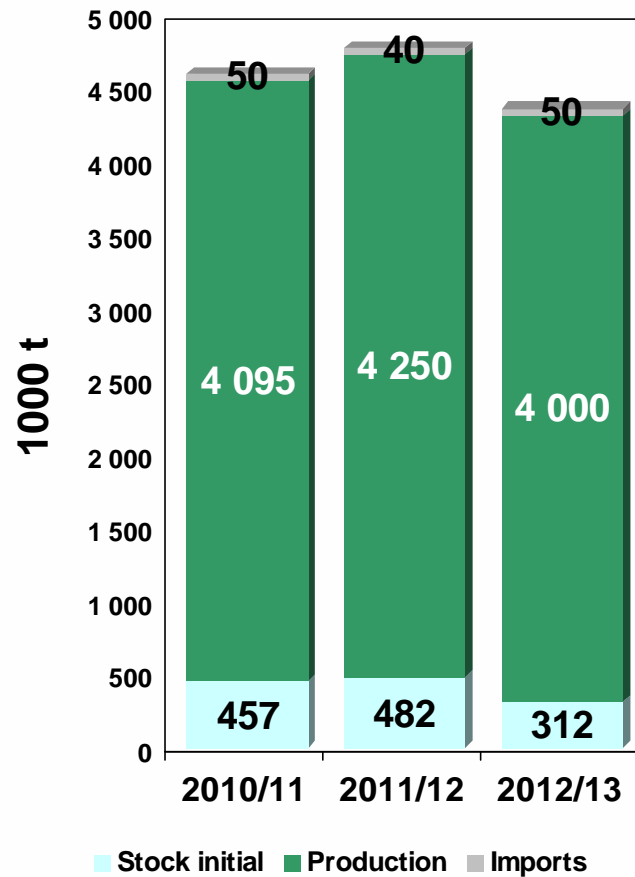


— 2009/10 — 2010/11
— 2011/12 — 2012/13

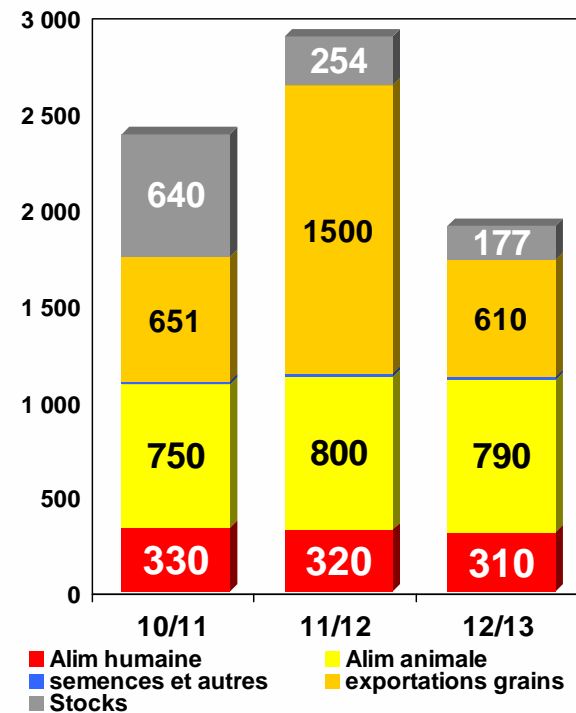
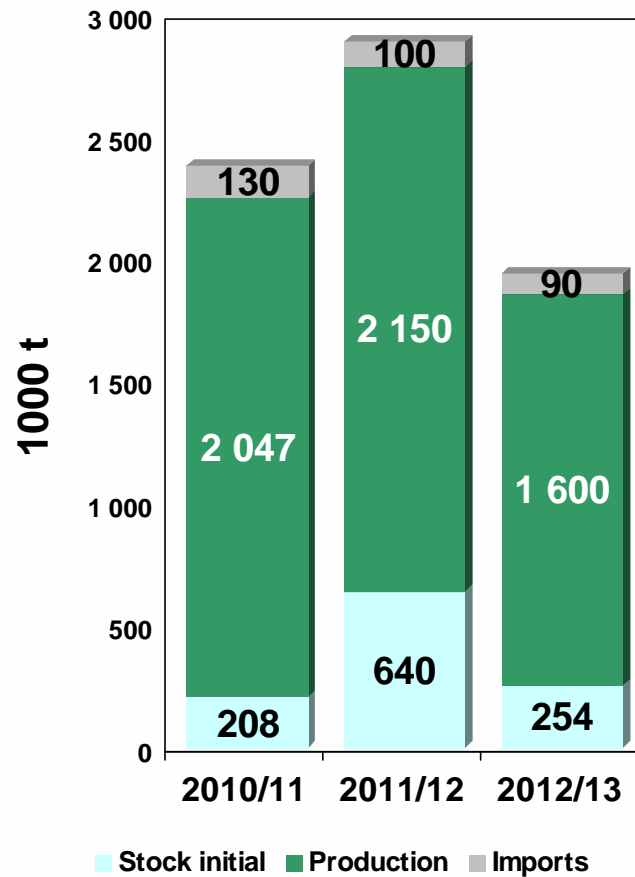
ROUMANIE : Bilan maïs



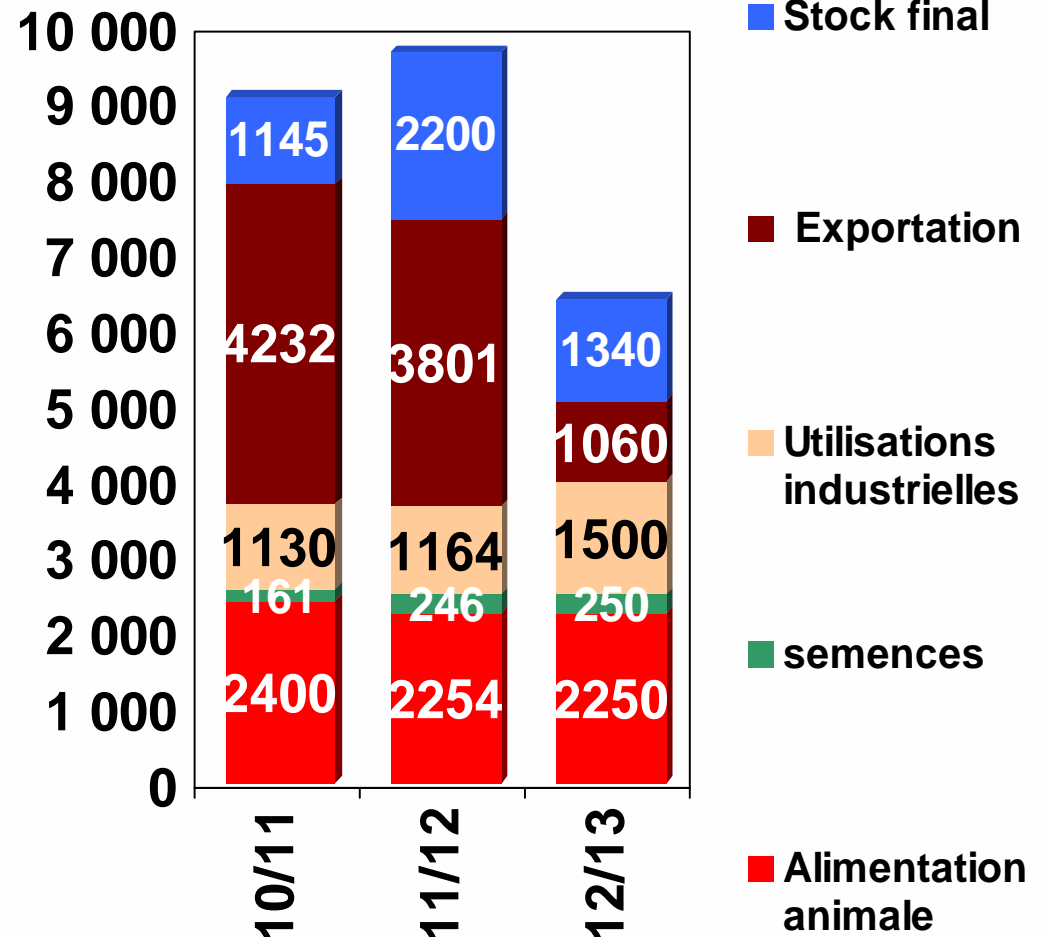
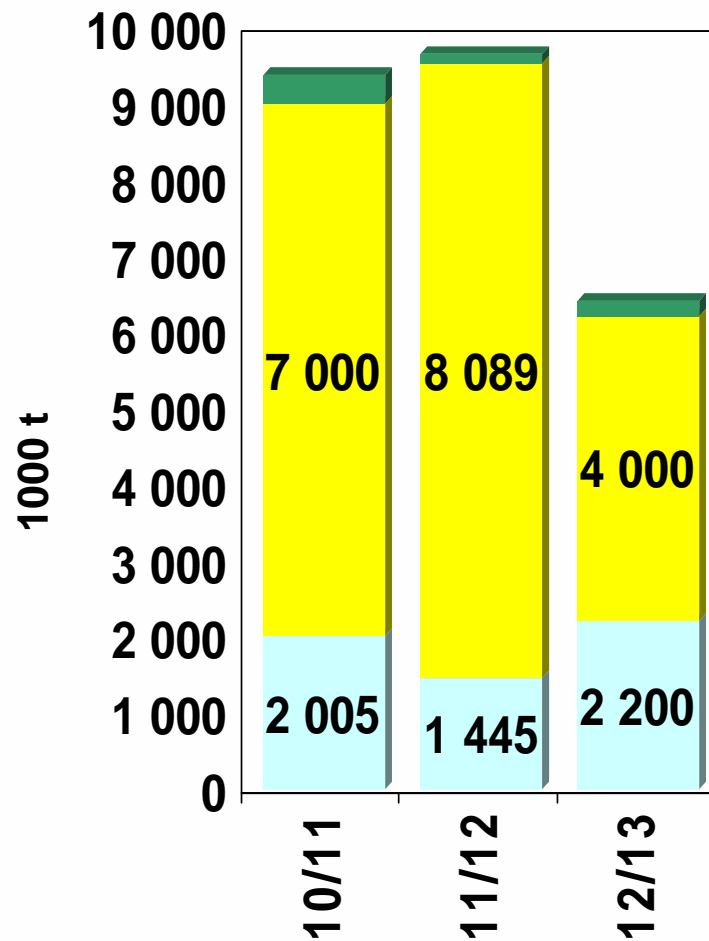
BULGARIE : bilan blé tendre



BULGARIE : bilan maïs

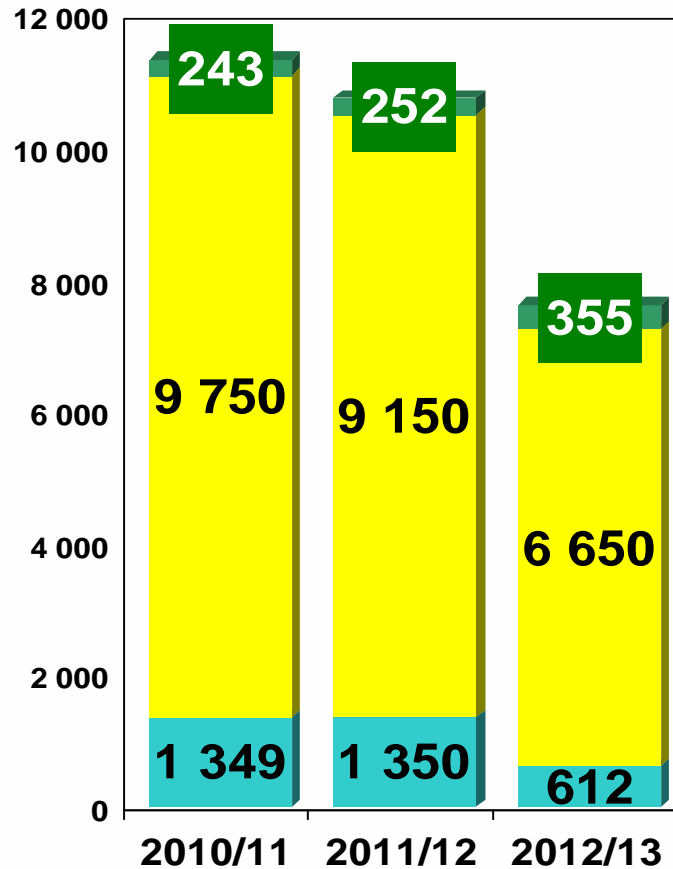


Hongrie, bilan maïs

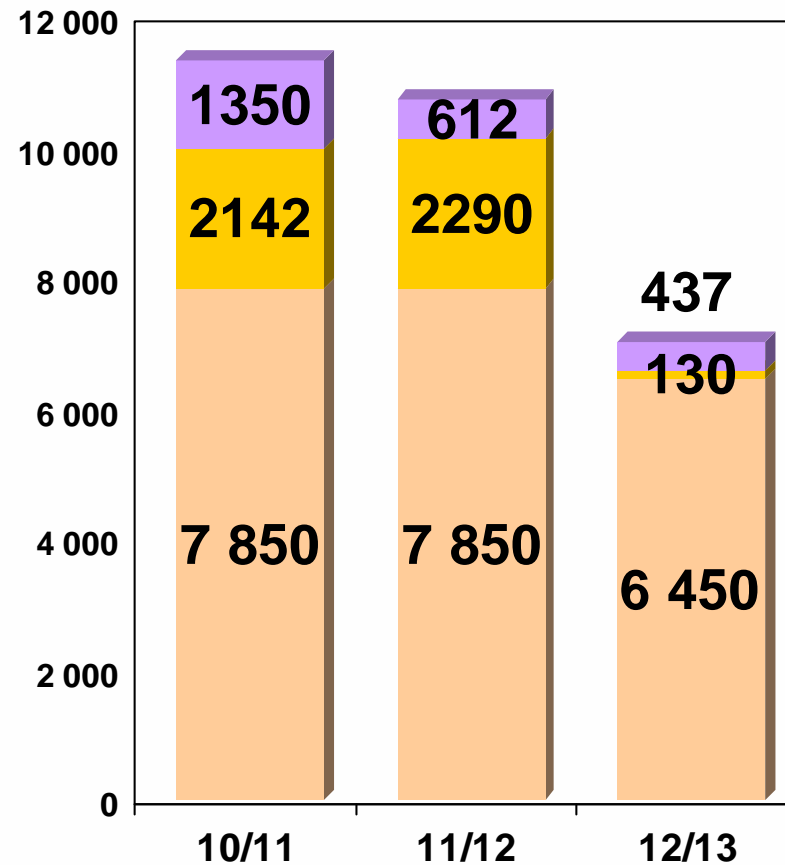


Stock Production

Bilan Maïs Balkans occidentaux



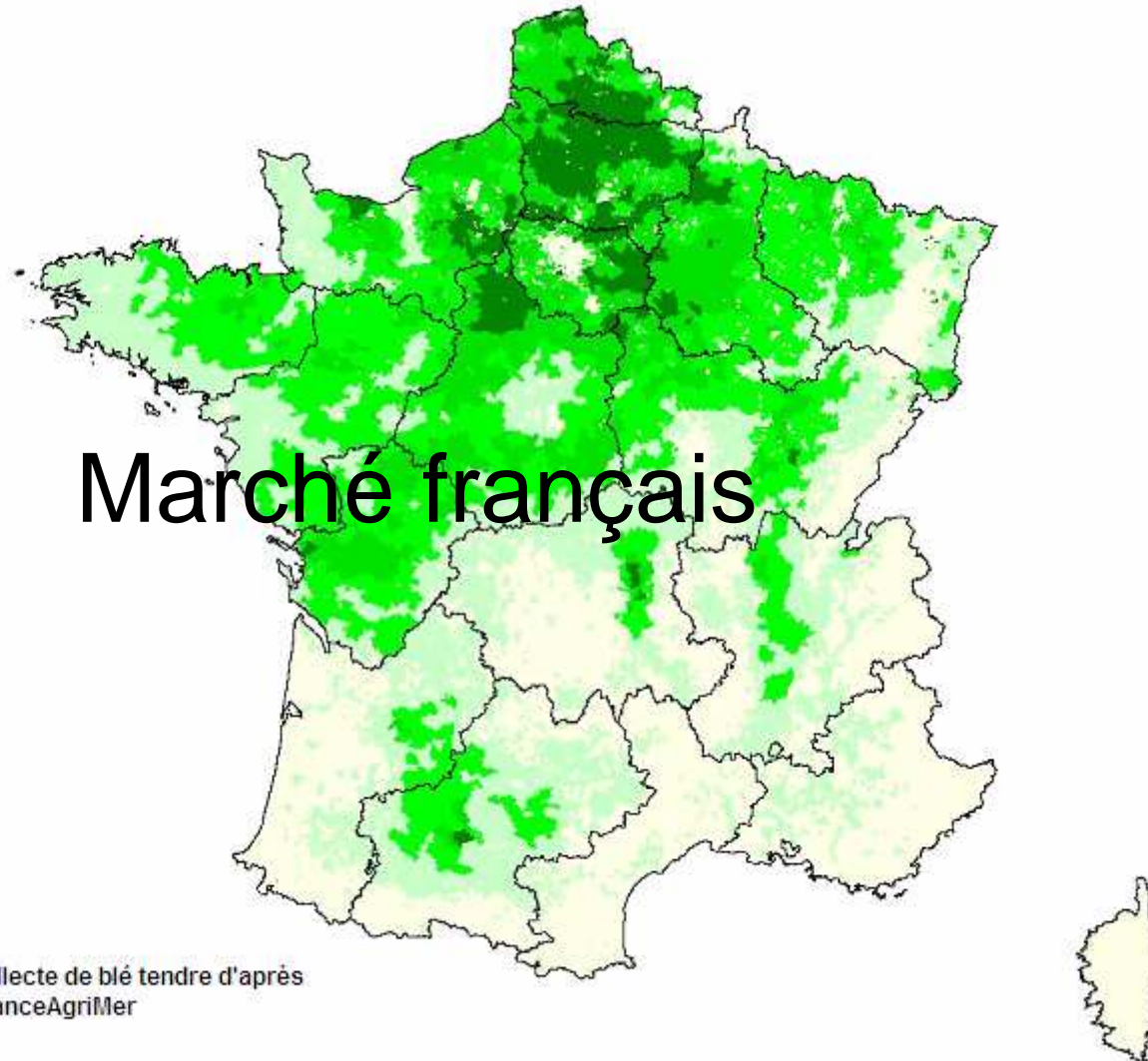
■ Stock initial ■ Production ■ Imports



■ Conso intérieure ■ exportations grains ■ Stocks

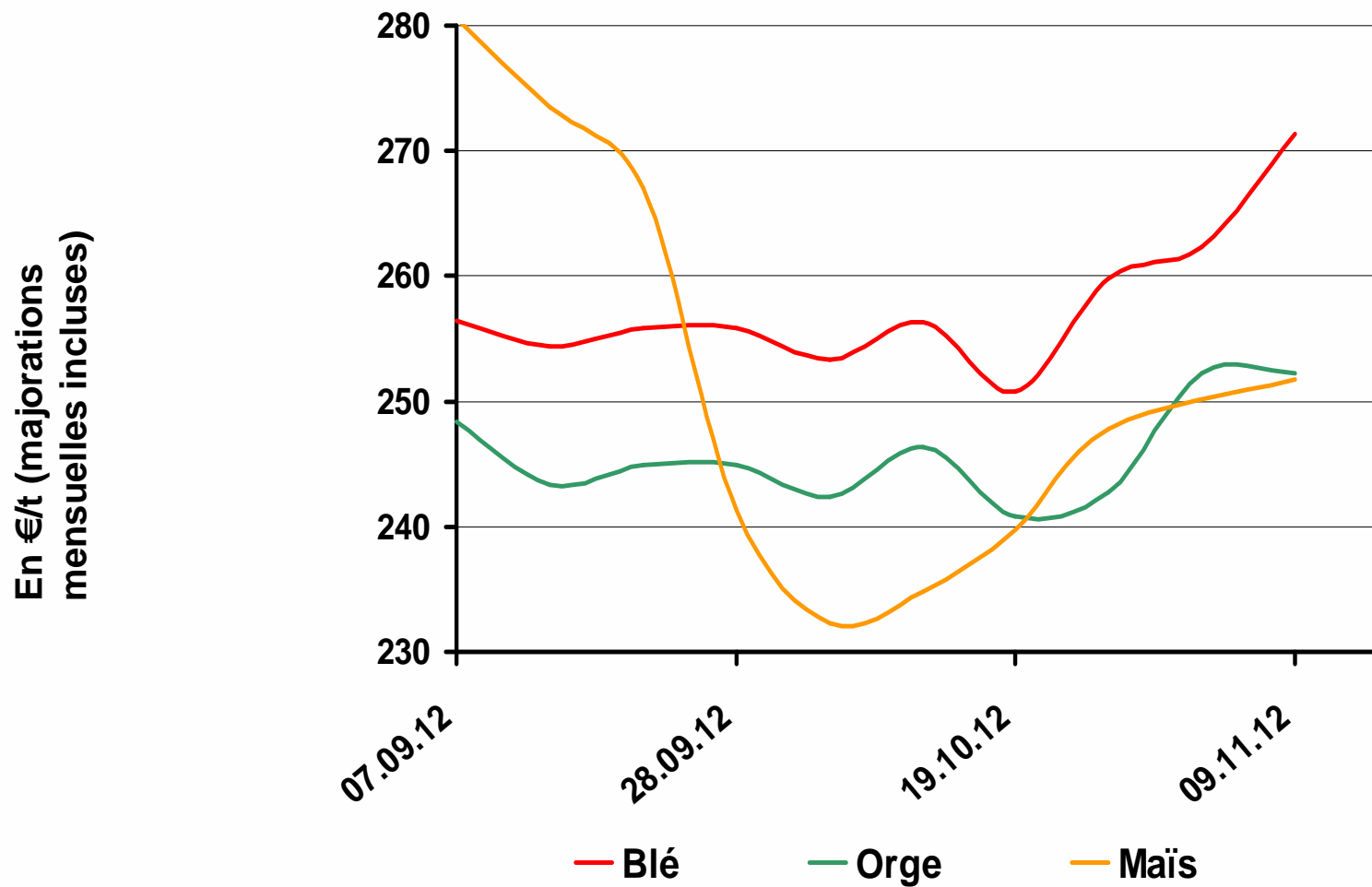


FranceAgriMer

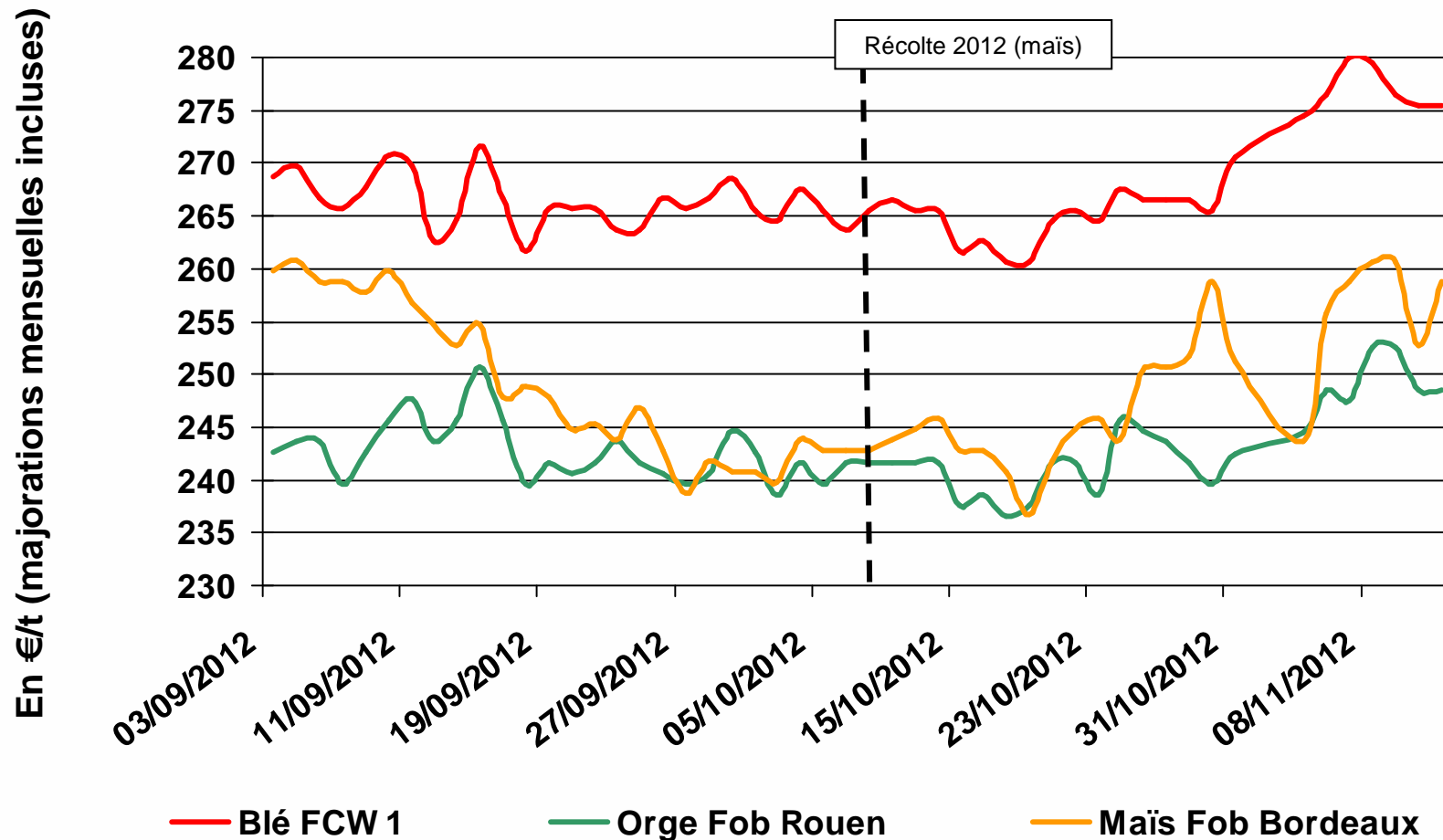


densité de collecte de blé tendre d'après
les états 1 FranceAgriMer

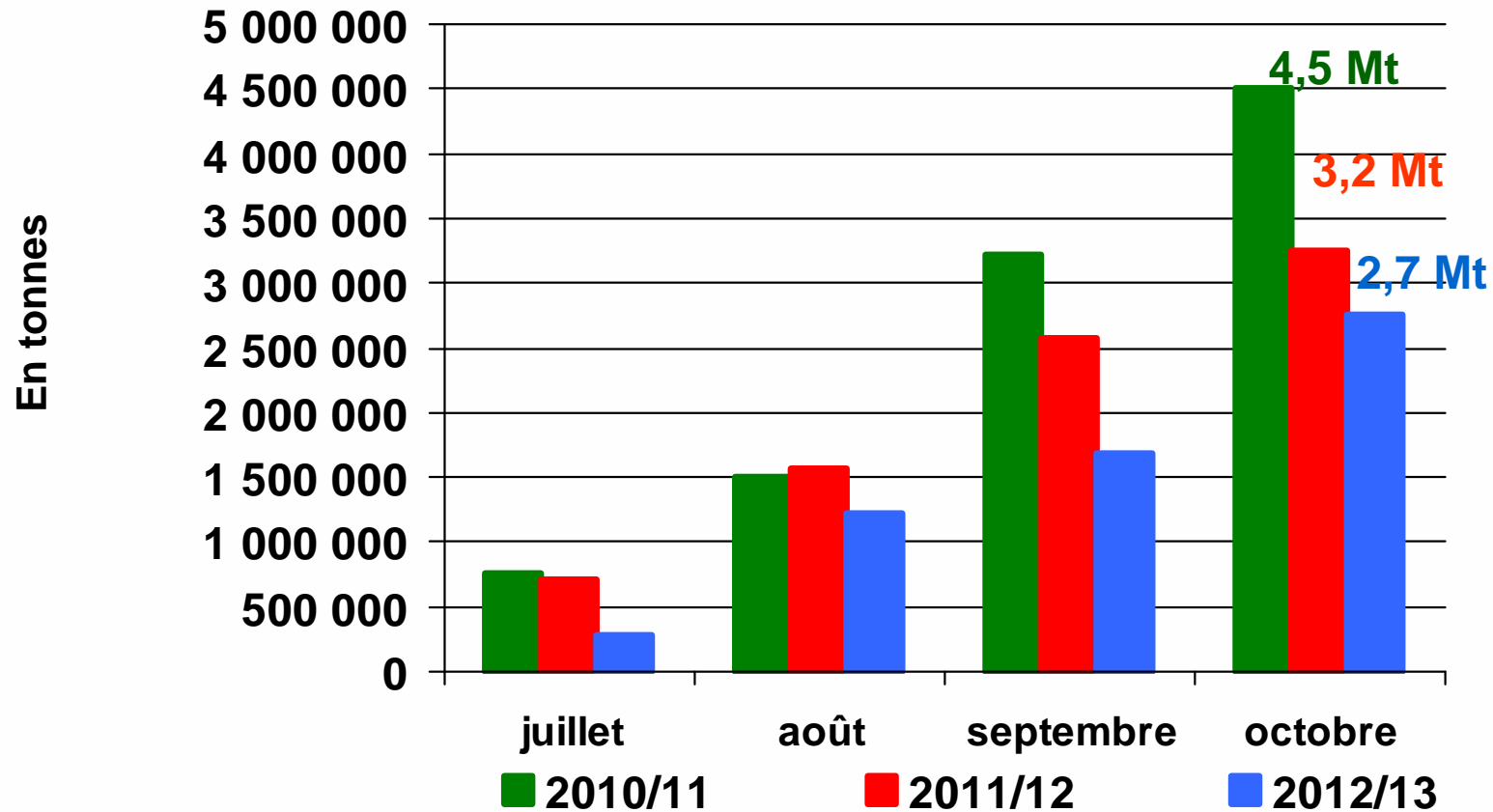
Prix du blé tendre, de l'orge et du maïs en rendu Pontivy



Céréales françaises : cotations à l'exportation

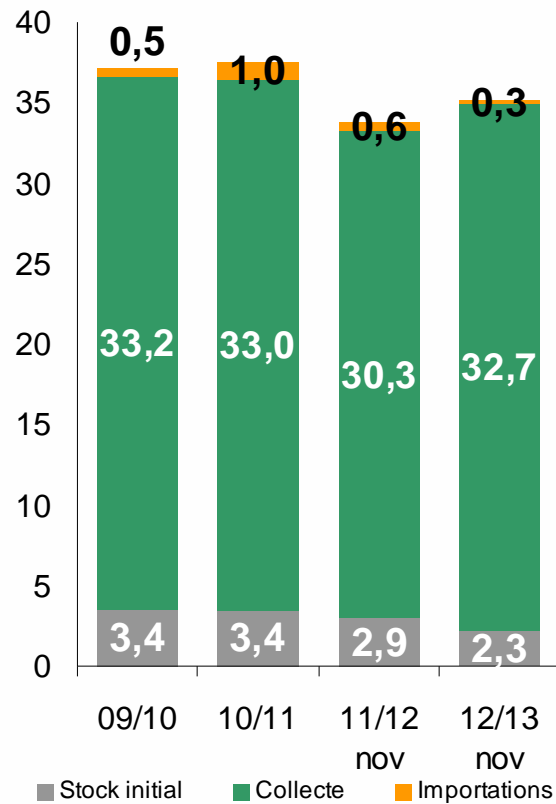


Blé tendre : cumul des embarquements vers les pays tiers depuis les ports français

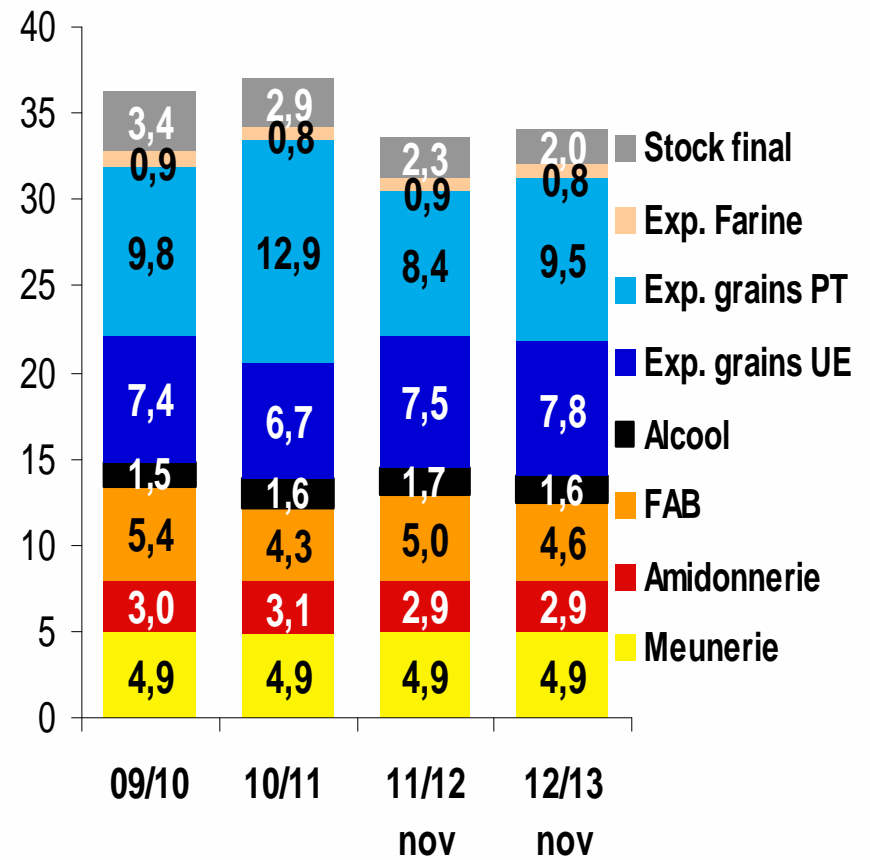


Bilan blé tendre

Mt



Mt



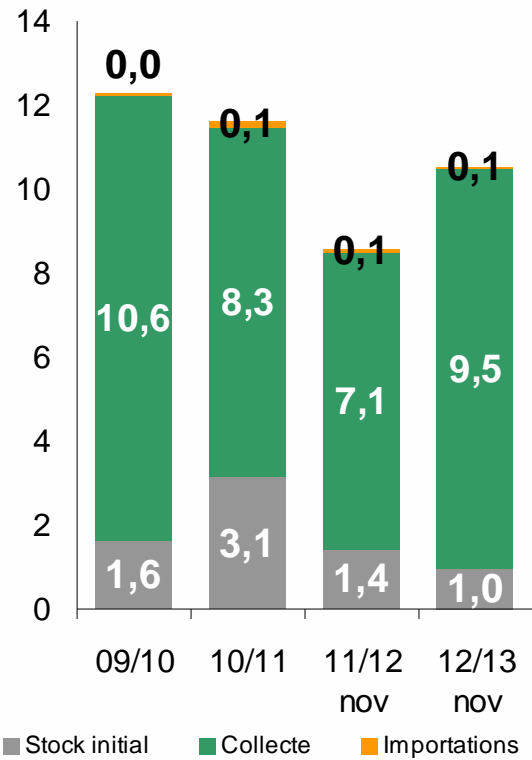
Exportations pays tiers au départ de la France

En Mt, projection FranceAgriMer

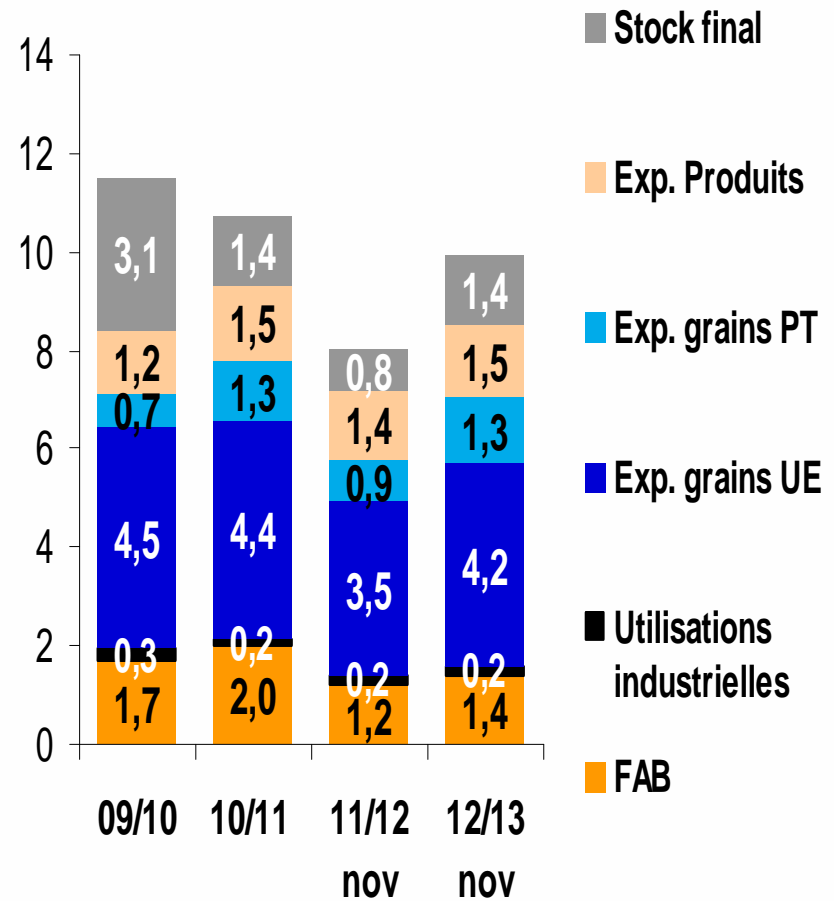
Maroc	2,5
Algérie	3,5
Tunisie	0,1
Lybie	0,1
Egypte	1,5
Ethiopie	-
Cuba	0,4
Syrie	-
Chine	-
Afrique subsaharienne	2,1
Yemen	0,4
Autres	-
Total Pays-Tiers	10,6

Bilan orges

Mt

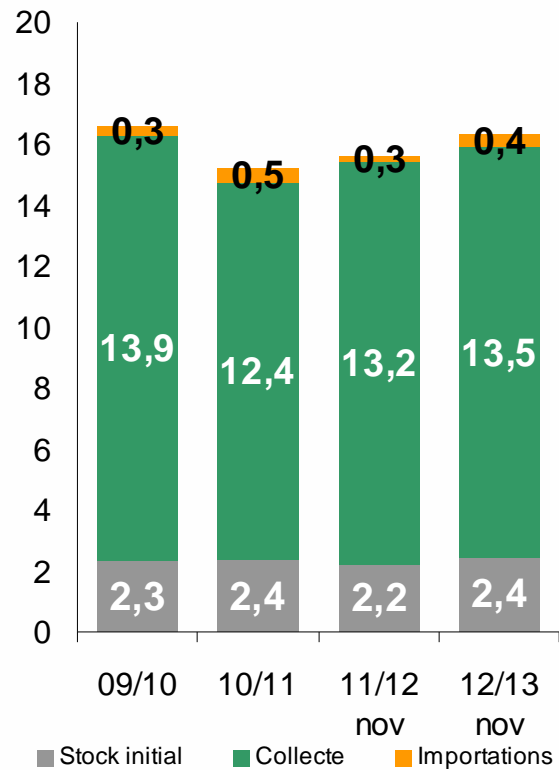


Mt

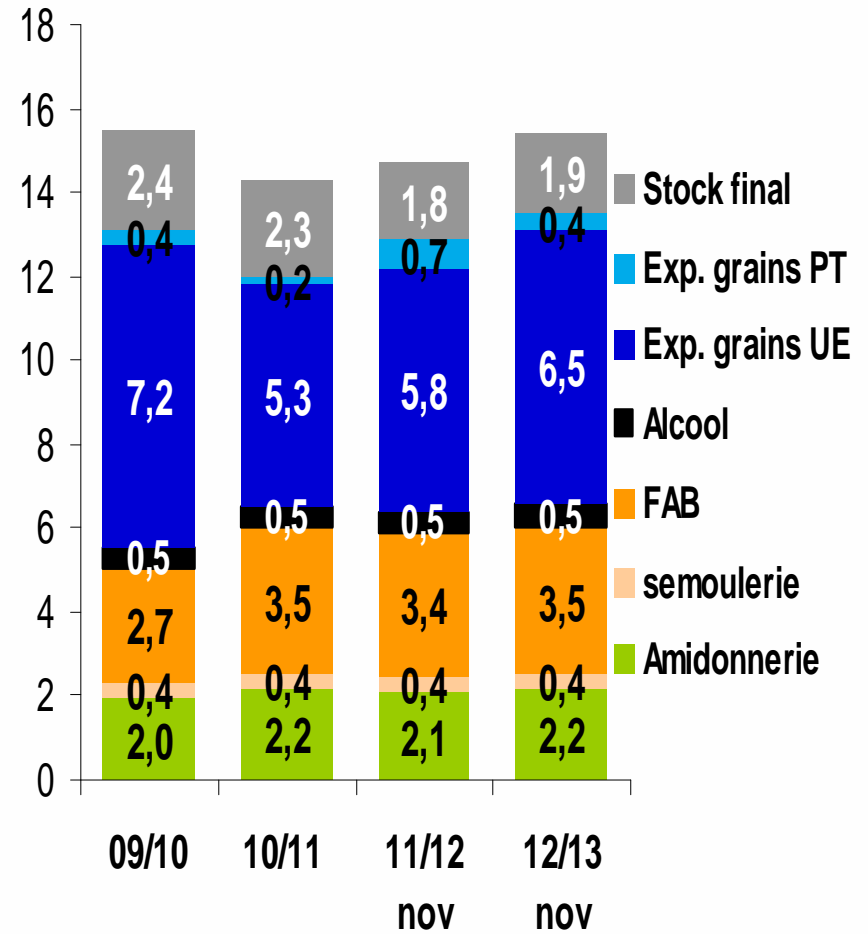


Bilan maïs

Mt

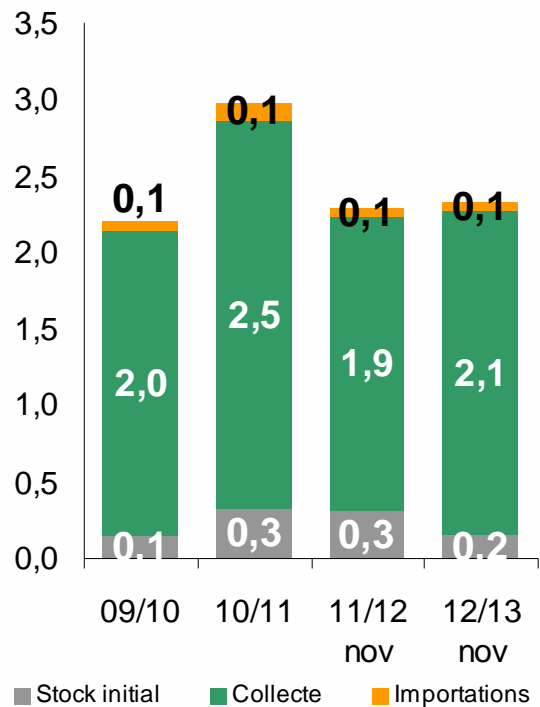


Mt

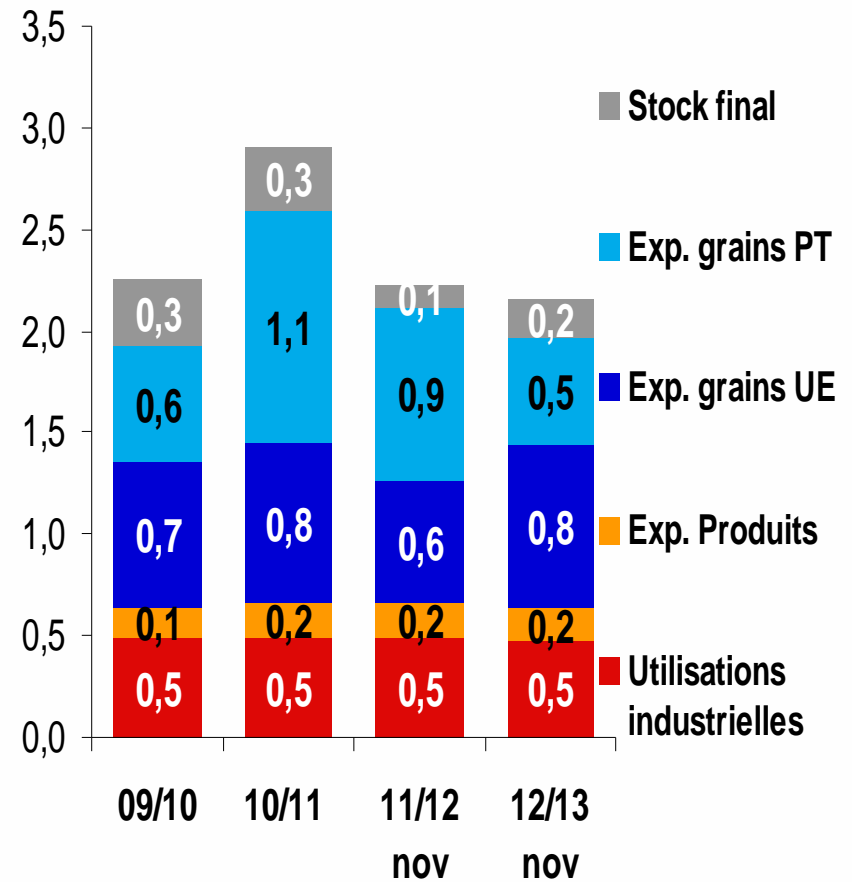


Bilan blé dur

Mt



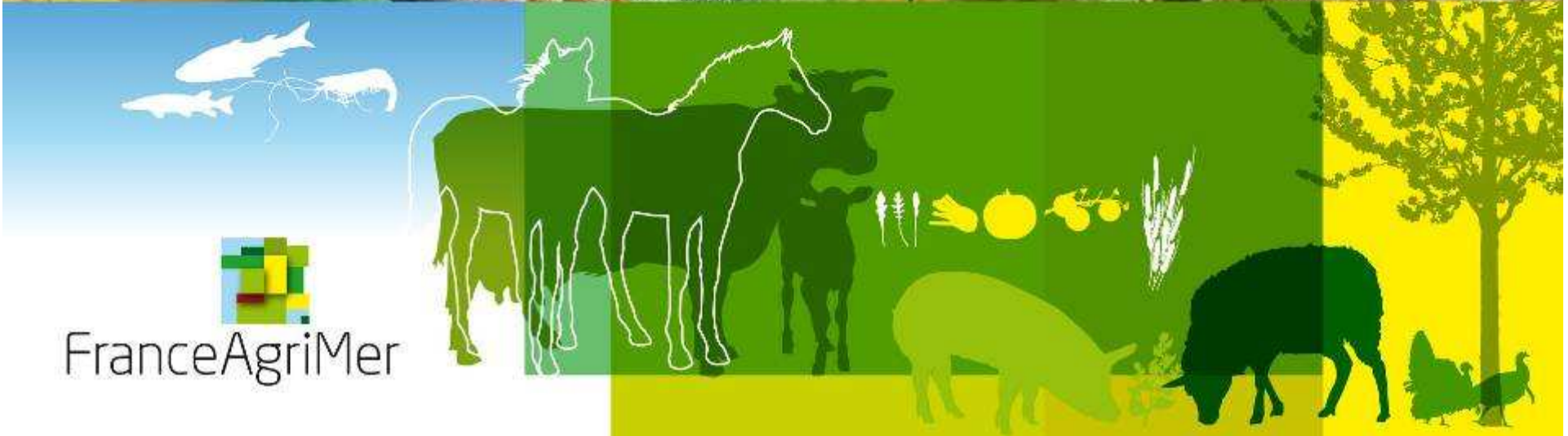
Mt



Merci de votre attention

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