

# FranceAgriMer

## Marché du blé dur

### Campagne 2016/17

### Projections 2017/18





# Points clés

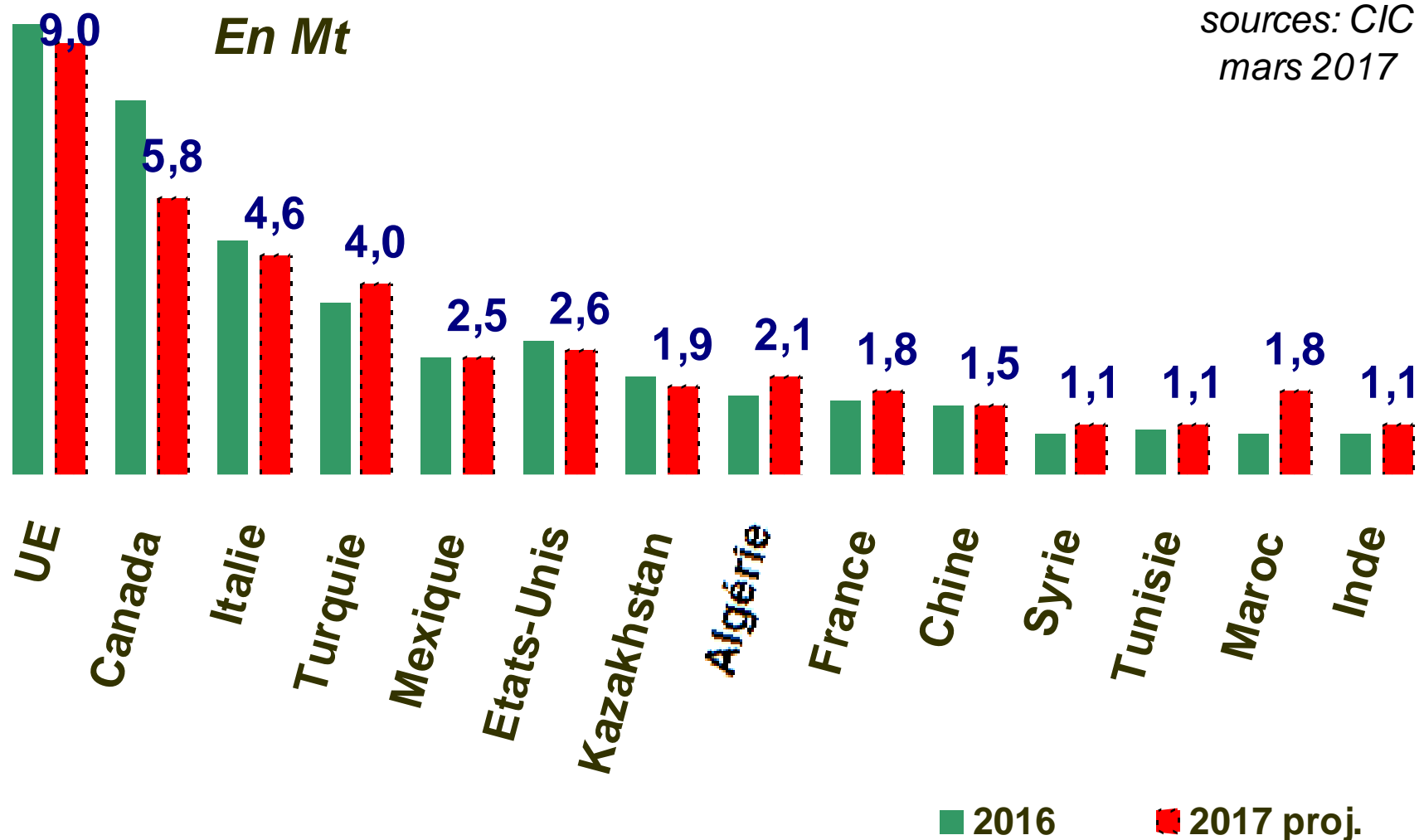
## •2016/17:

- Des stocks mondiaux en forte hausse: près de 11 Mt prévus en juin 2017 (notamment Canada et USA)!

## •Prévisions 2017/18:

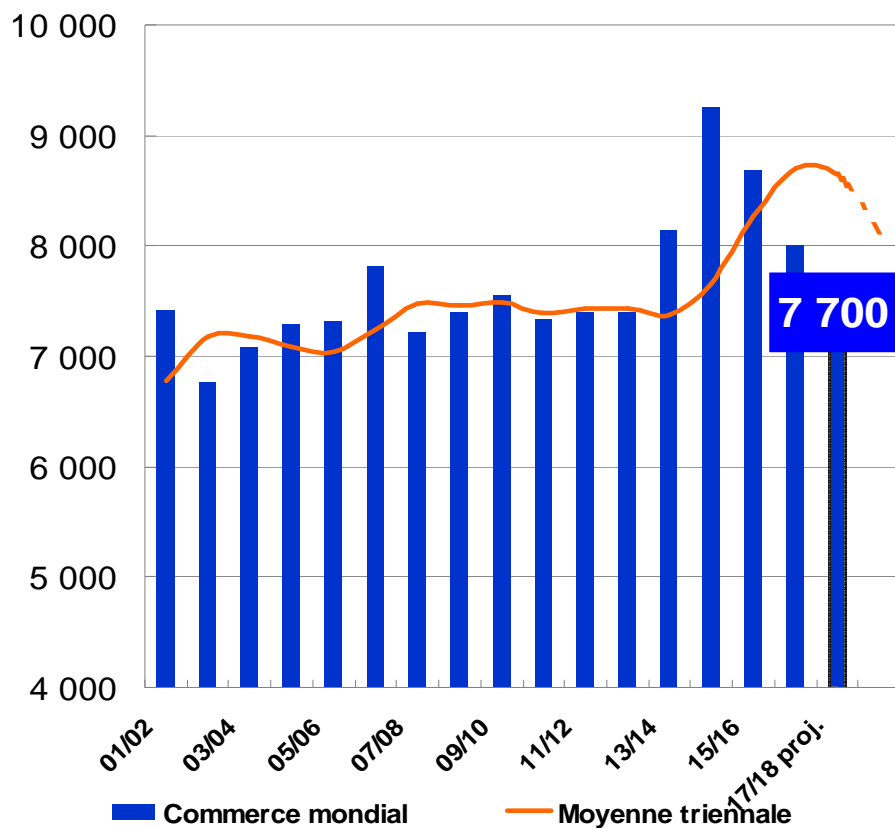
- Recul des surfaces mondiales attendu
- Repli modéré de la production en UE
- Besoins d'importations limités de l'UE

# Production mondiale du blé dur par pays en 2016 et projections 2017

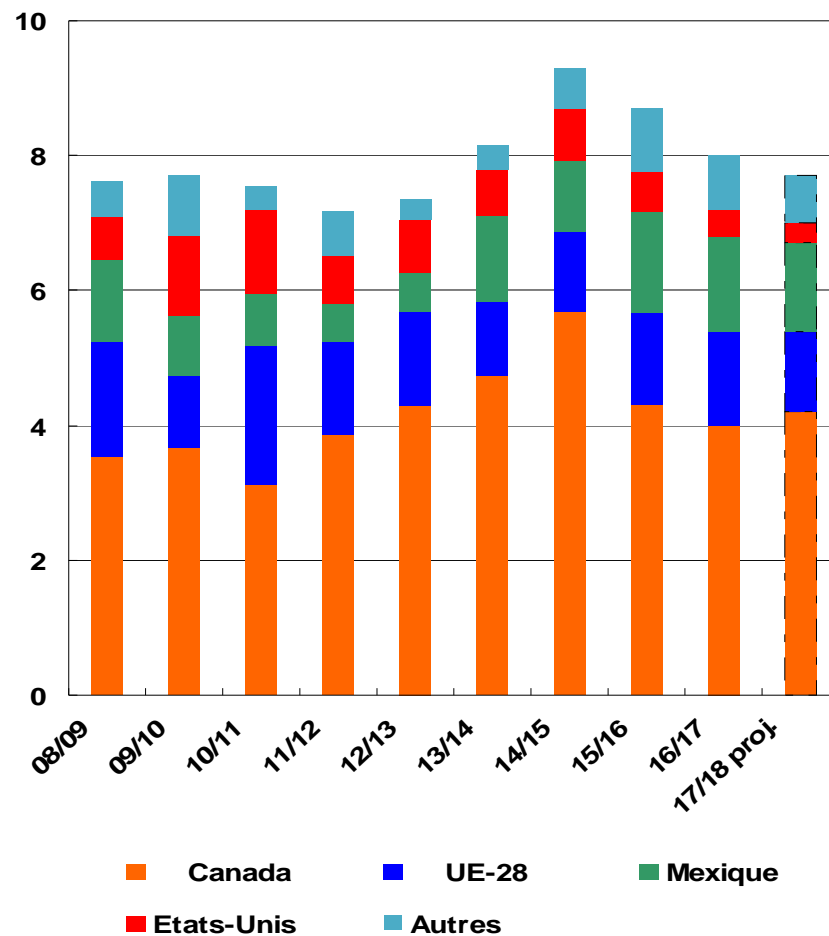


# Commerce mondial du blé dur

## Monde

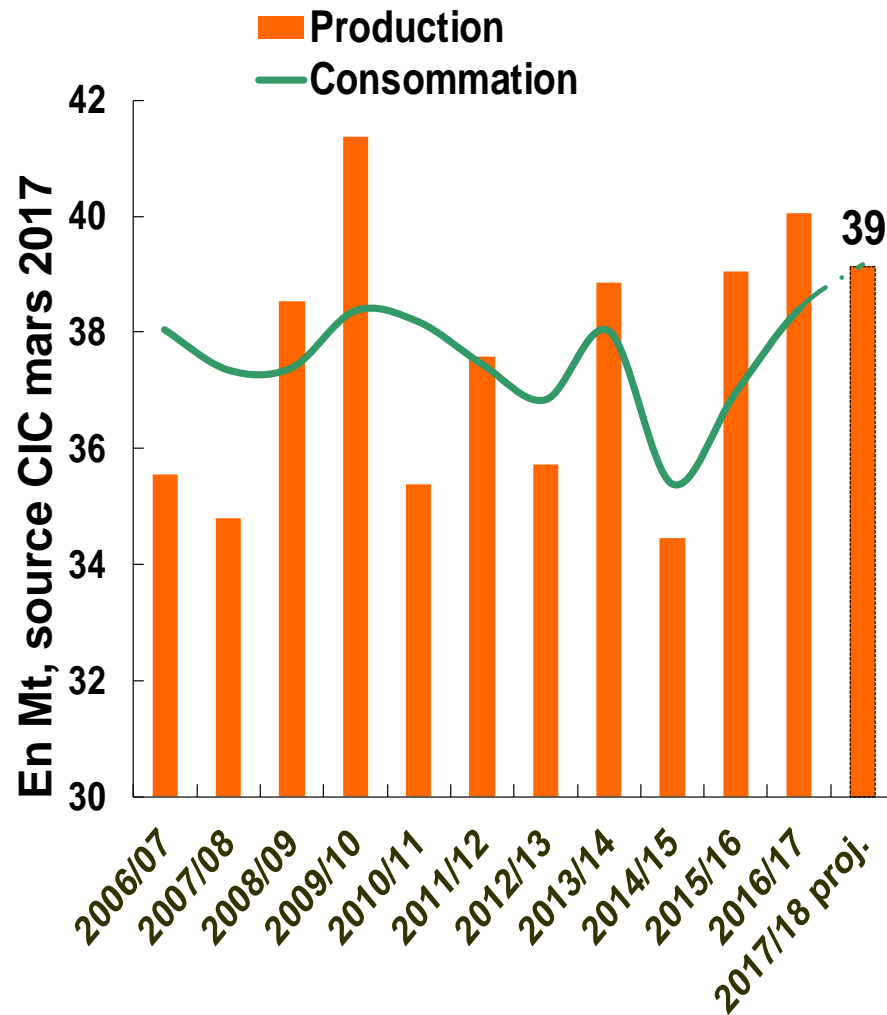


## Principaux exportateurs

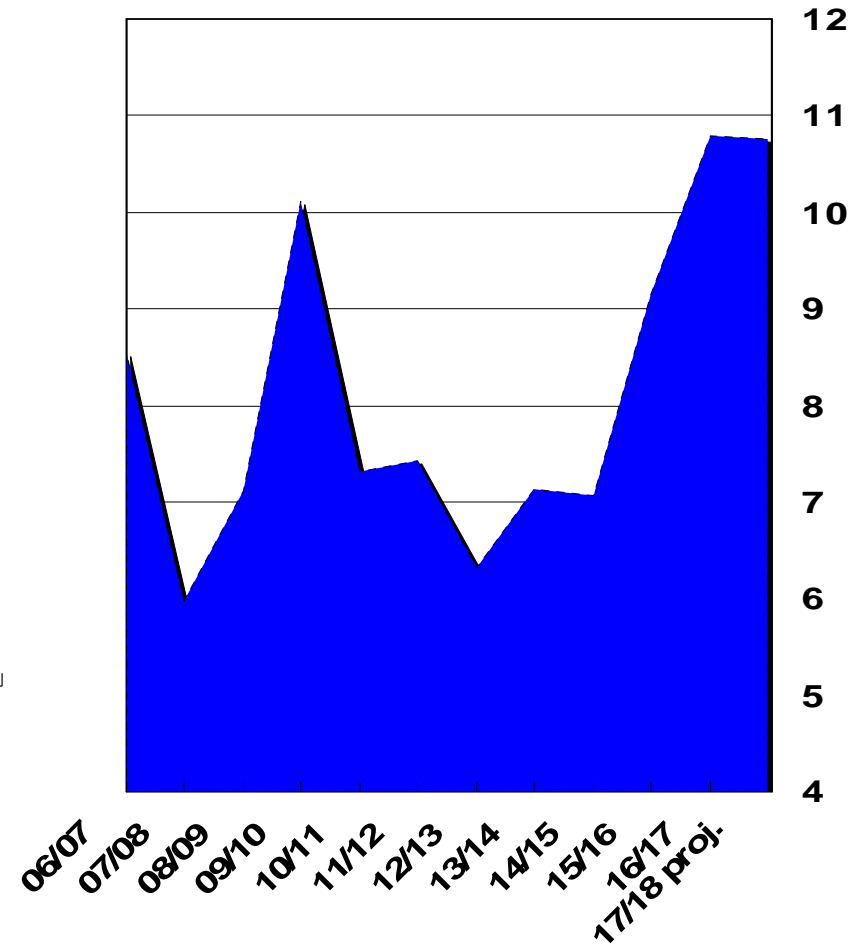


En Mt, source CIC mars 2017

# Bilan mondial du blé dur

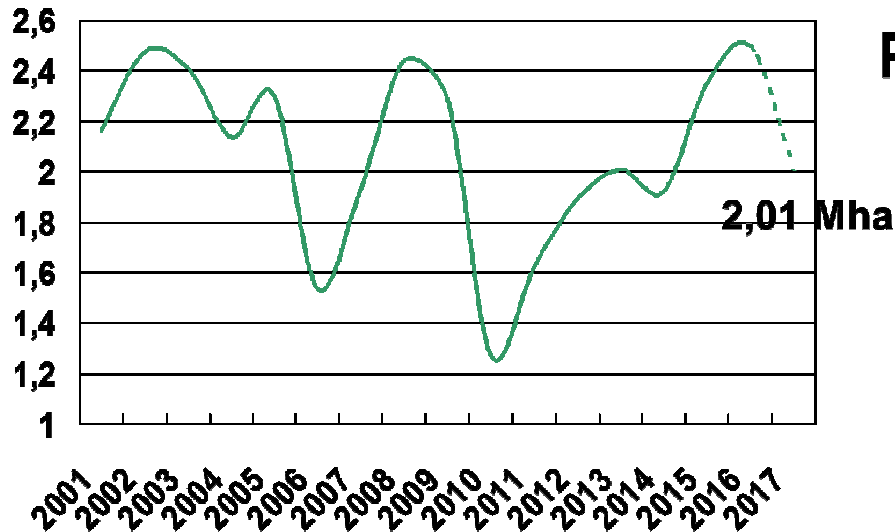


Stocks 11 Mt, toujours élevés!

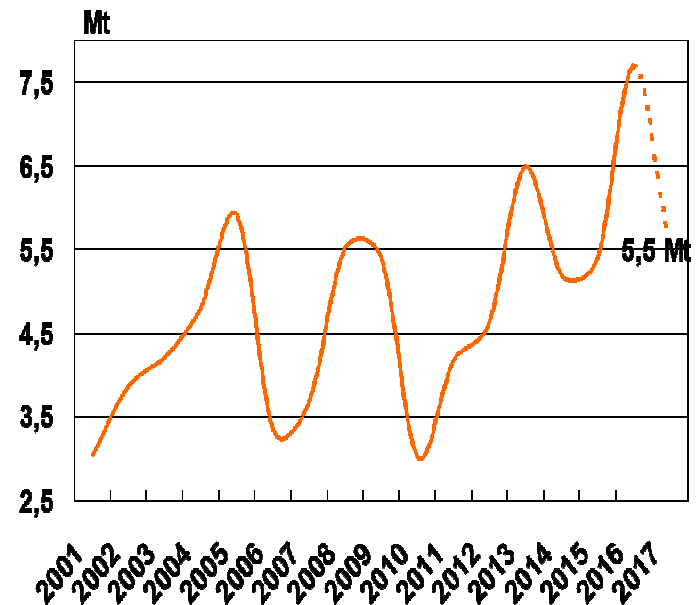


# Superficie, rendement, production Canada

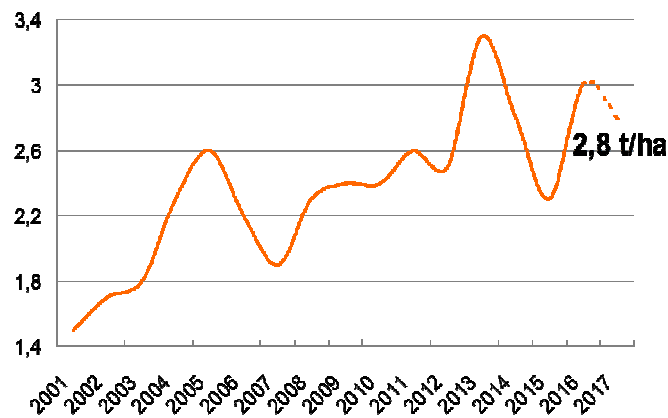
Superficie : - 20 %



Production : une baisse attendue de 28 %



Rendement en baisse

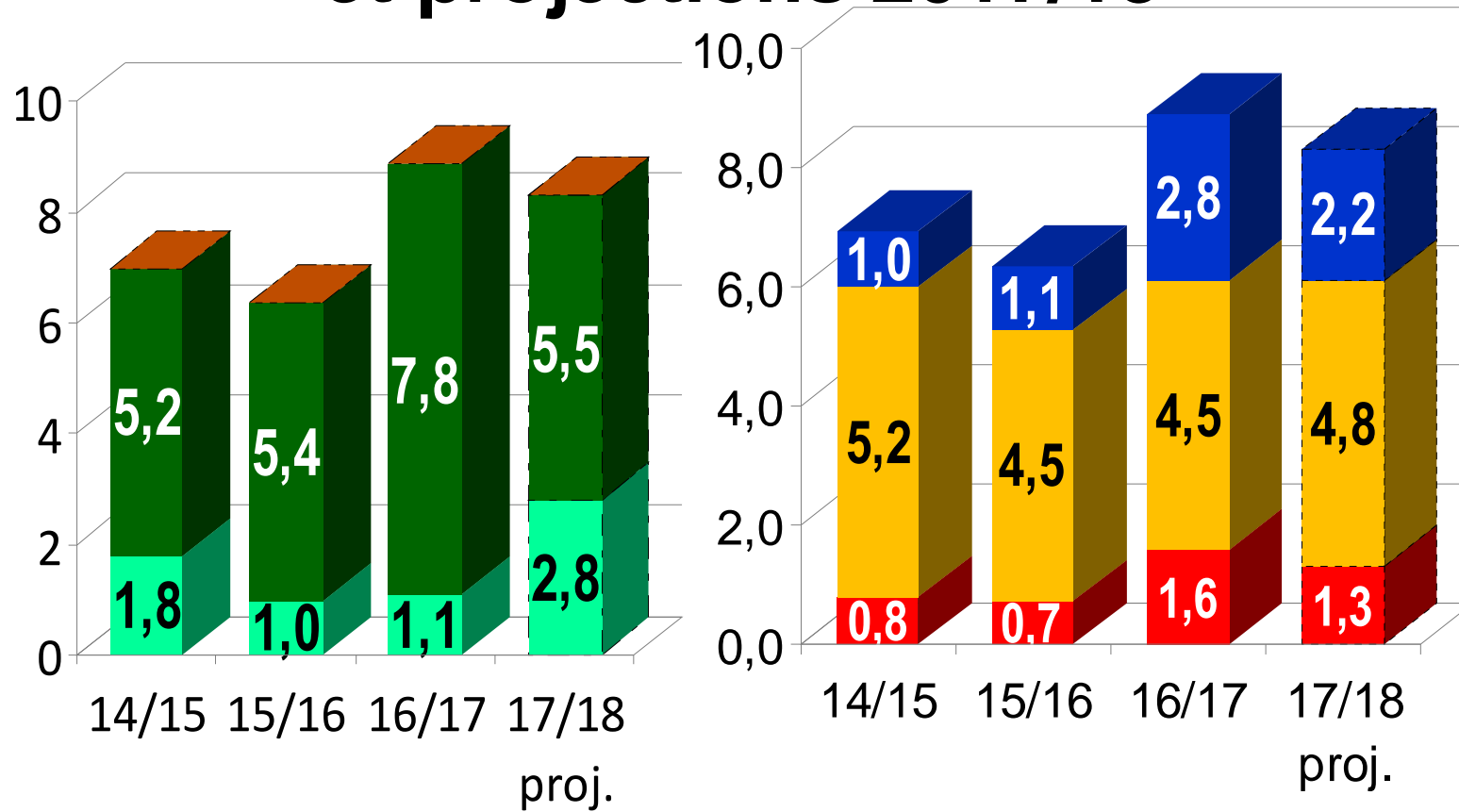


Superficie en millions d'ha, rendement en t/ha

Production en millions de t

SOURCES StatCan et AAC

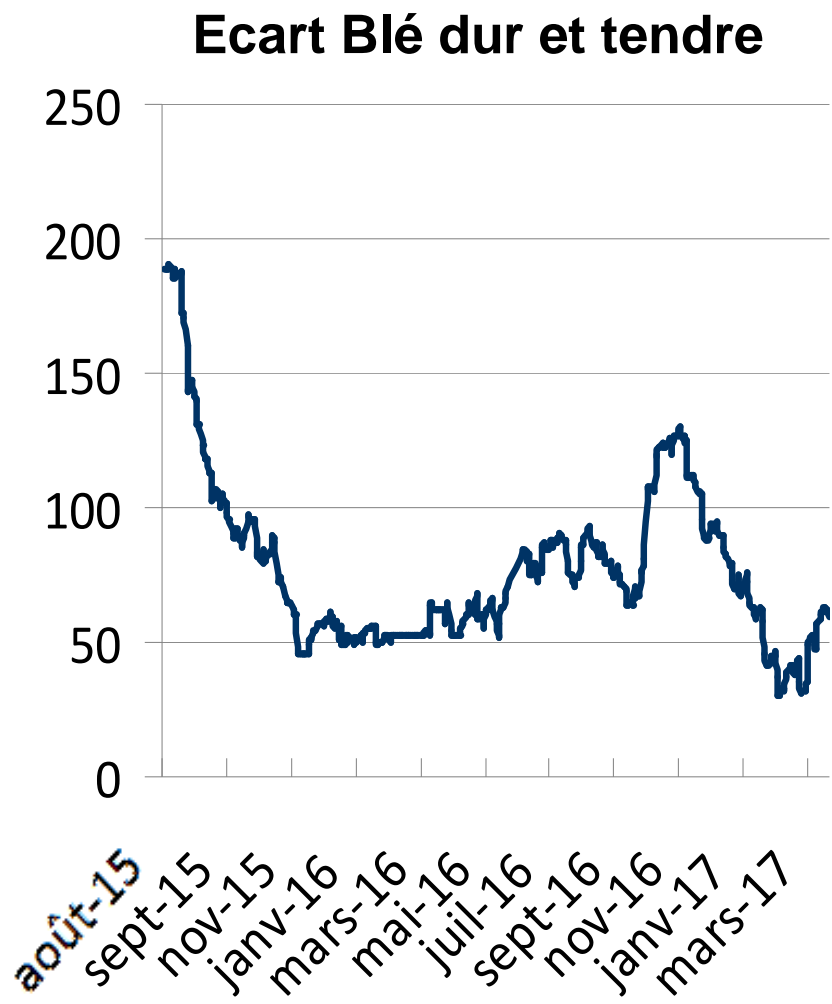
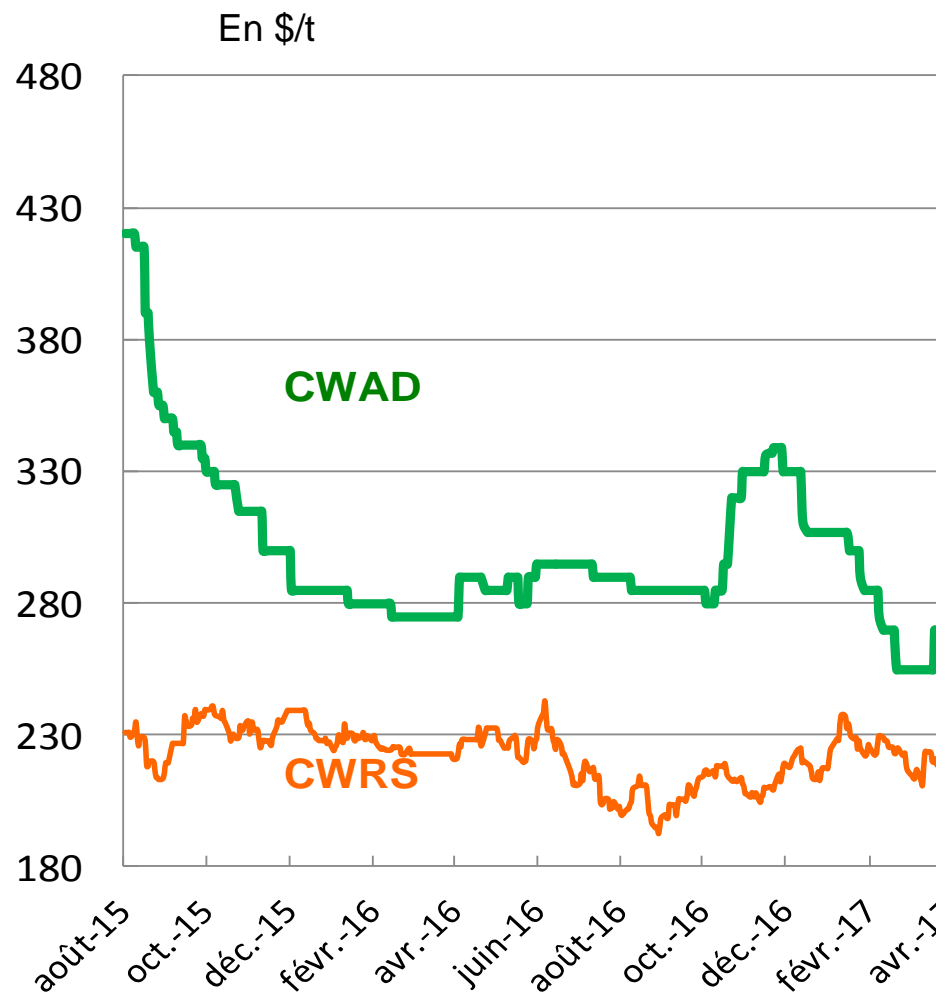
# Canada : bilan blé dur 2016/17 et projections 2017/18



■ Util Interieure    ■ Export    ■ Stock Fin  
■ Stock initial    ■ Production    ■ Import

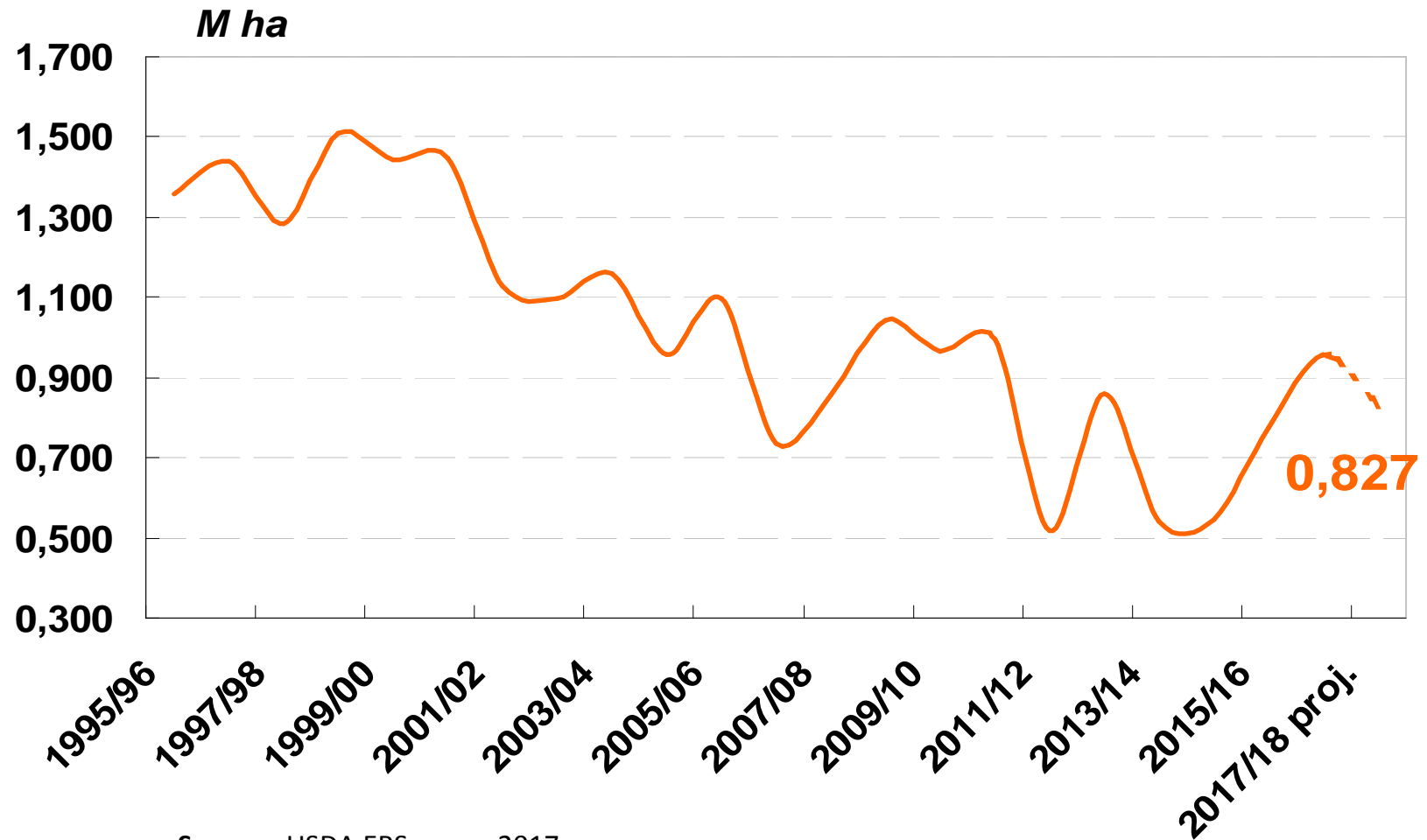
# Canada Cours du CWAD et CWRS

Fob St Laurent



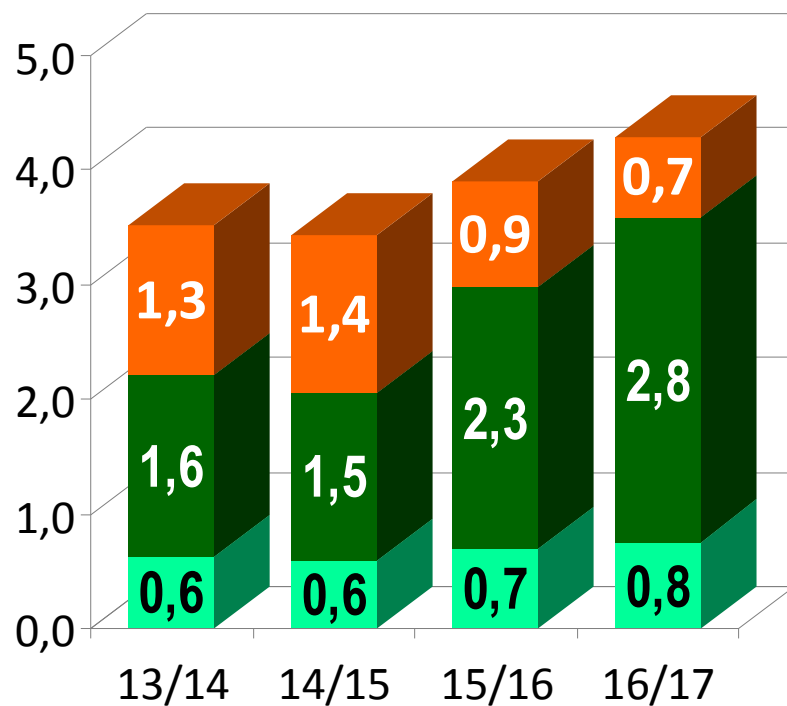


# Surfaces États-Unis 2017 attendues en baisse de 14 %

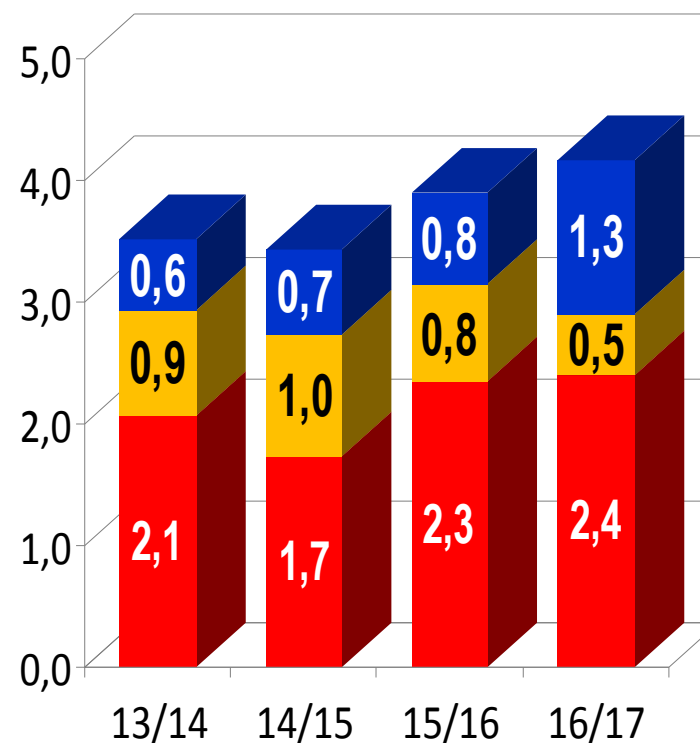


Source : USDA ERS , mars 2017

# Etats-Unis : bilan blé dur 2016/17 un niveau d'exportation moindre!



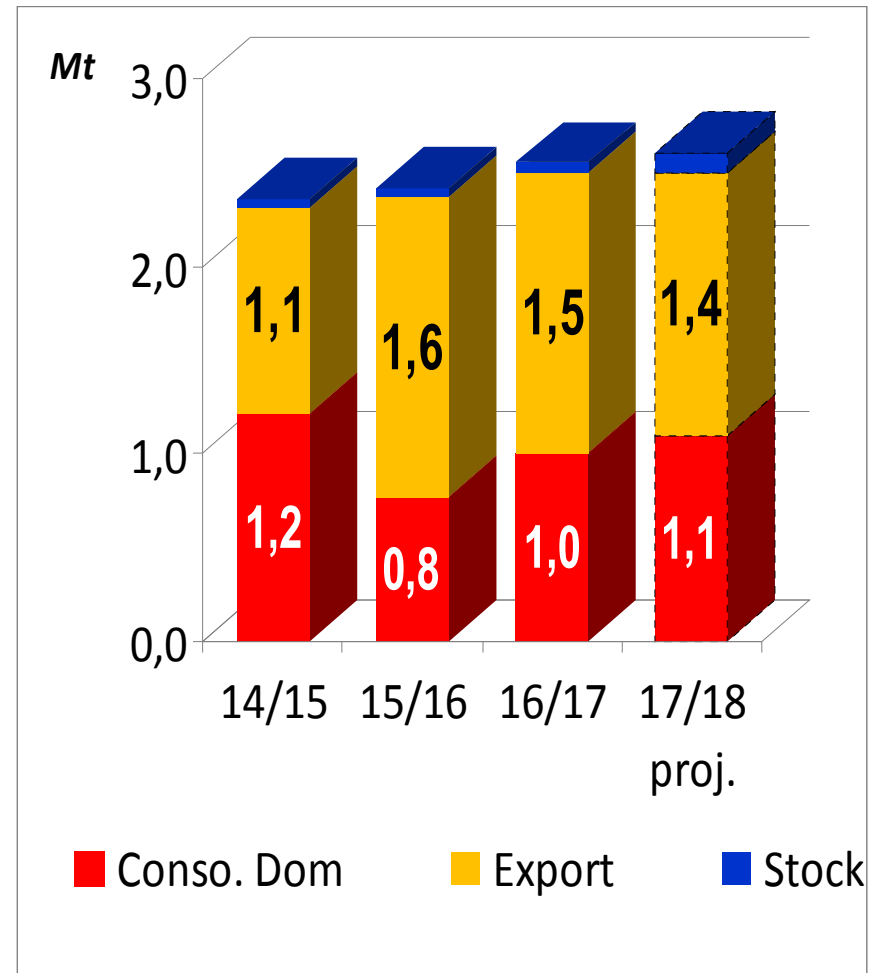
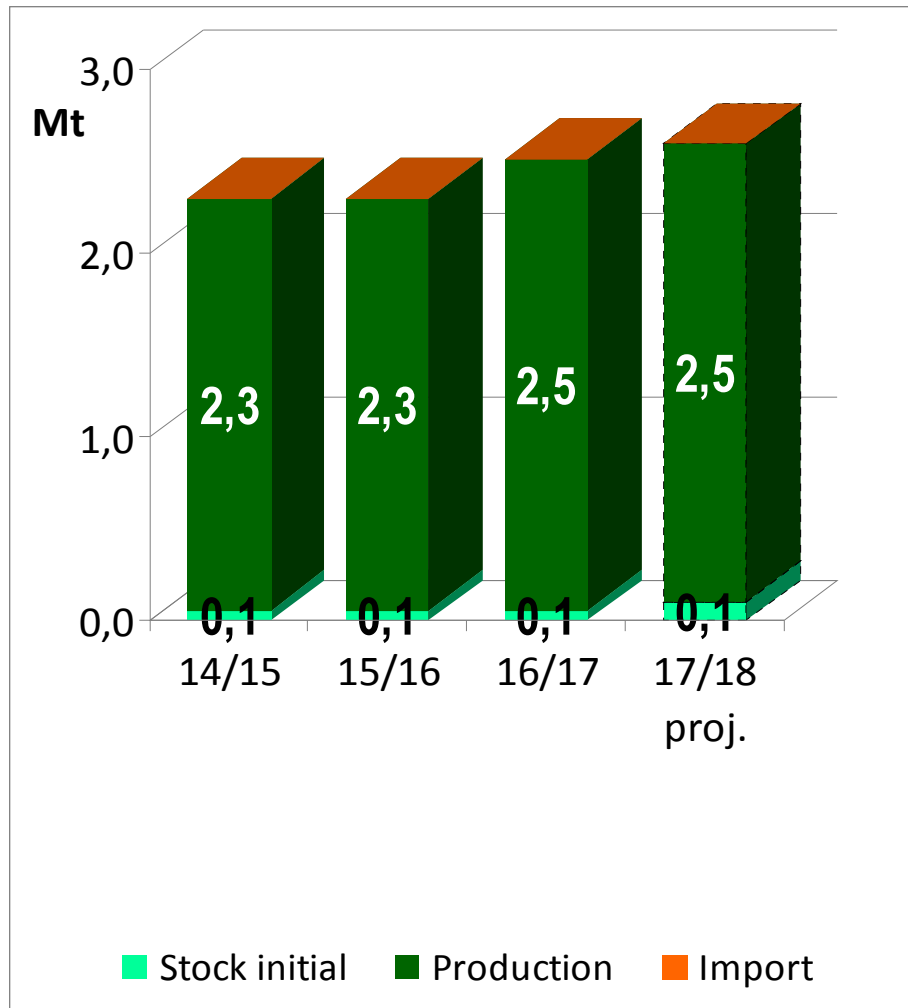
■ Stock initial ■ Production ■ Import



■ Conso. Dom ■ Export ■ Stock

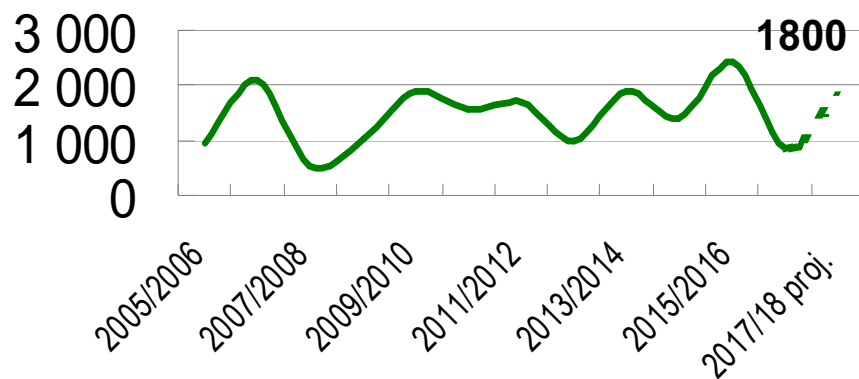
# Mexique : bilan blé dur 2016/17 et projections 2017/18

Sources: CIC

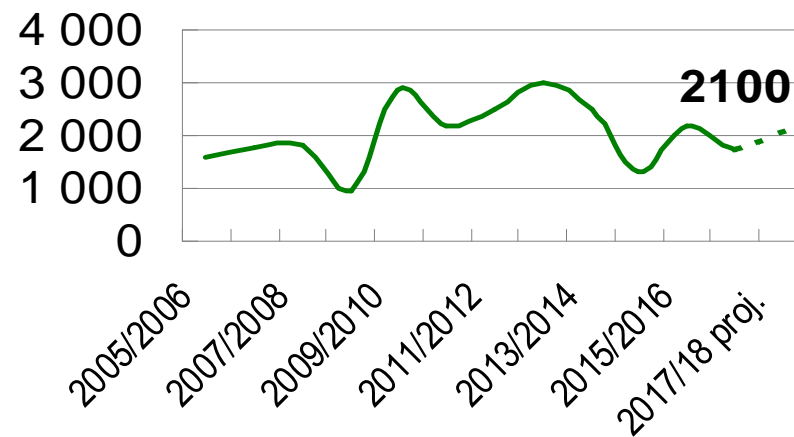


# Production de blé dur au Maghreb et en Turquie

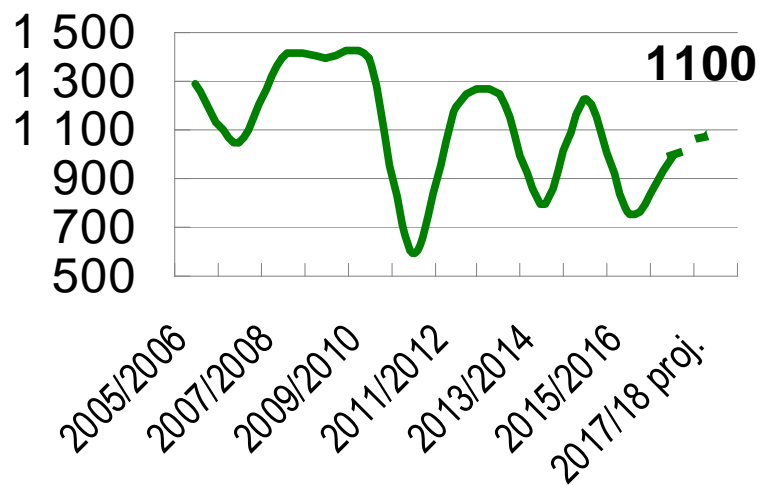
Maroc



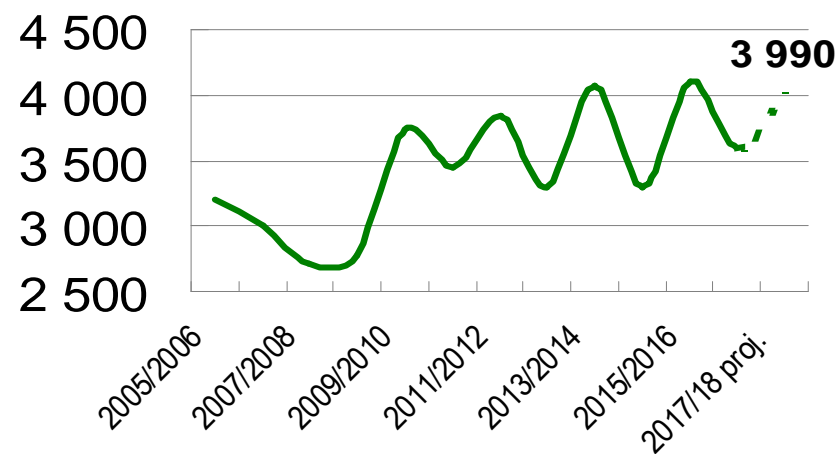
Algérie



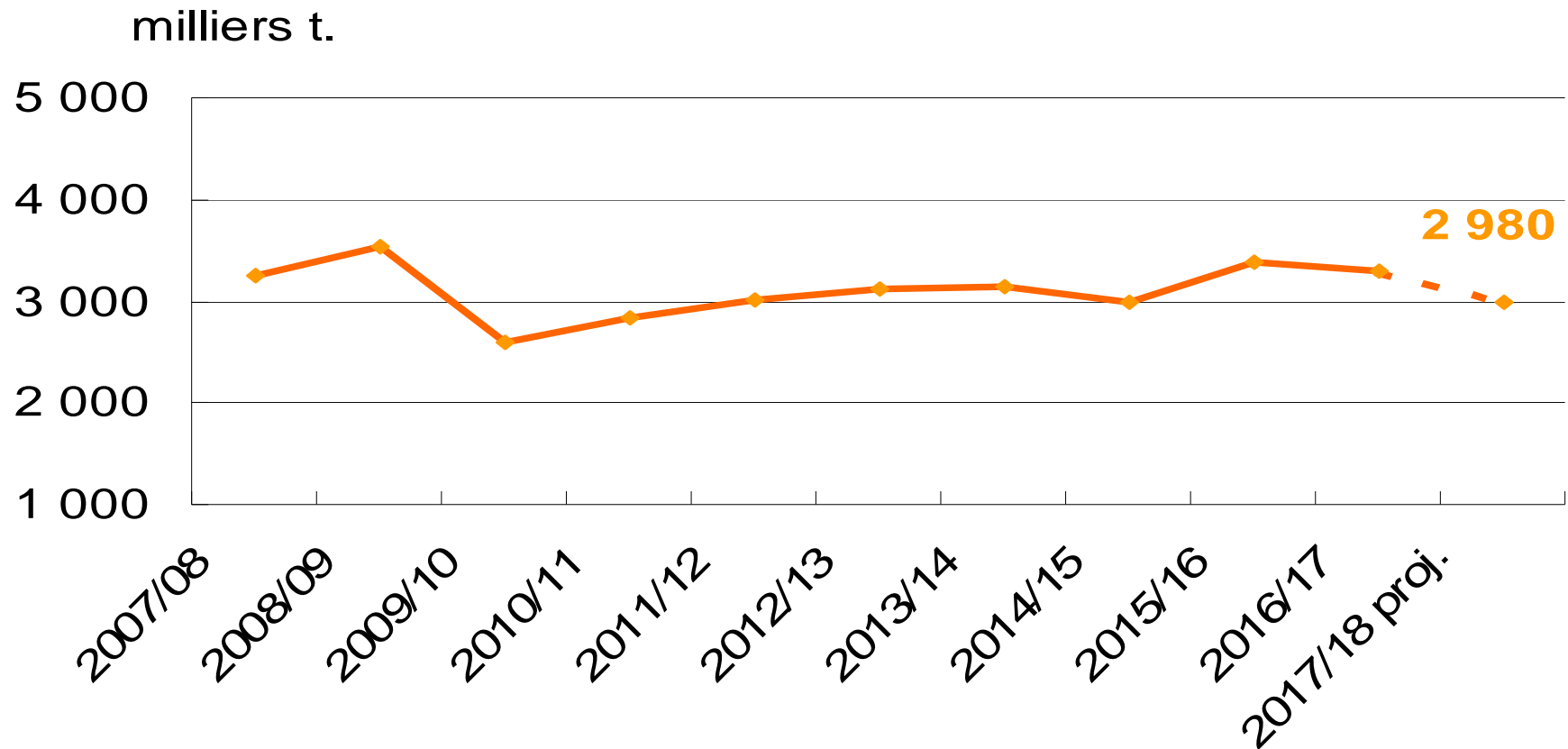
Tunisie



Turquie

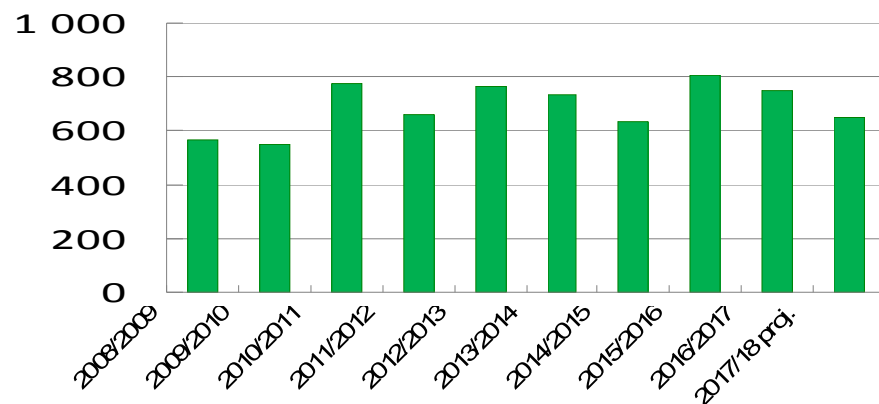


# Importation de blé dur du Maghrel

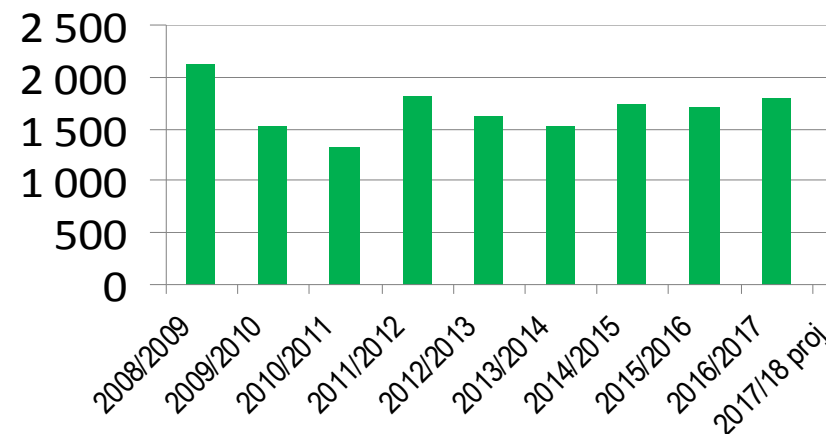


# Importation de blé dur au Maghreb et en Turquie

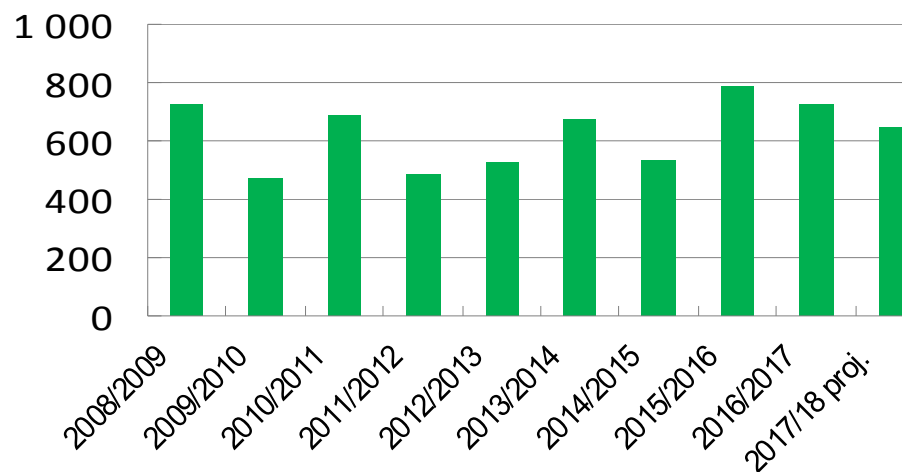
## Maroc



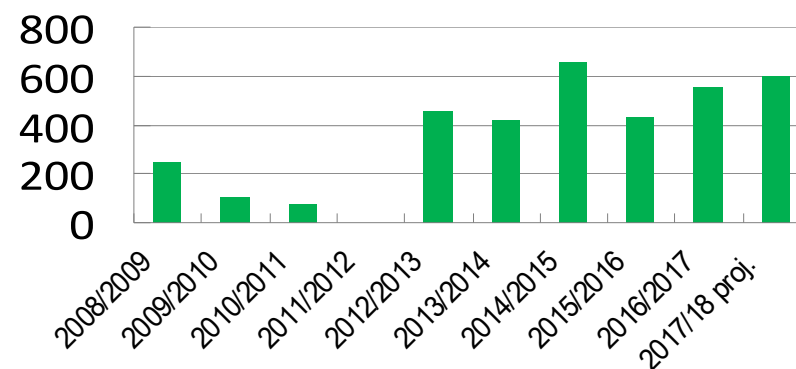
## Algérie



## Tunisie



## Turquie



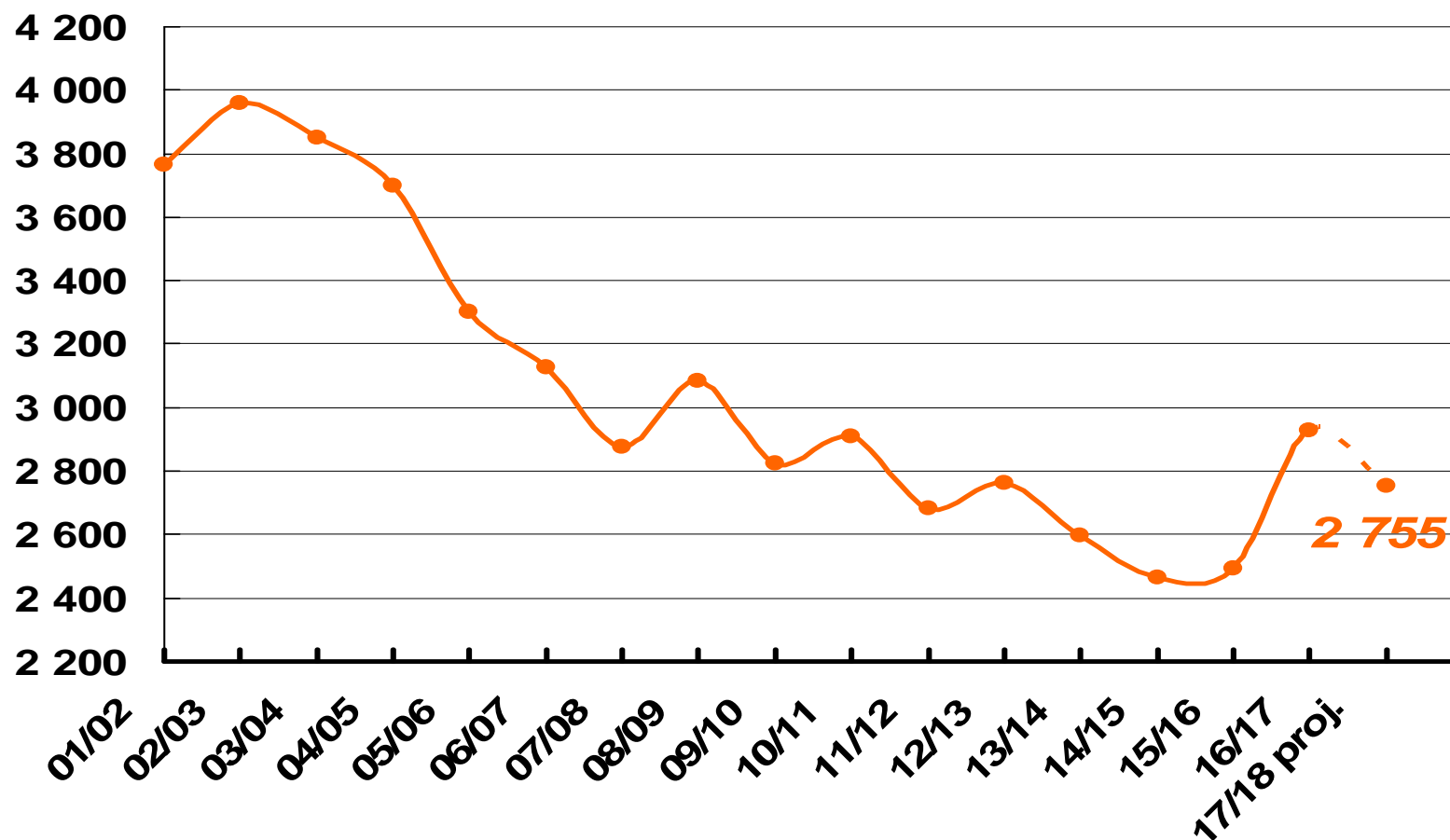


# LE MARCHÉ DU BLE DUR EN EUROPE

# Surfaces de blé dur en Europe

## Un recul possible de 6 % en 2017/18

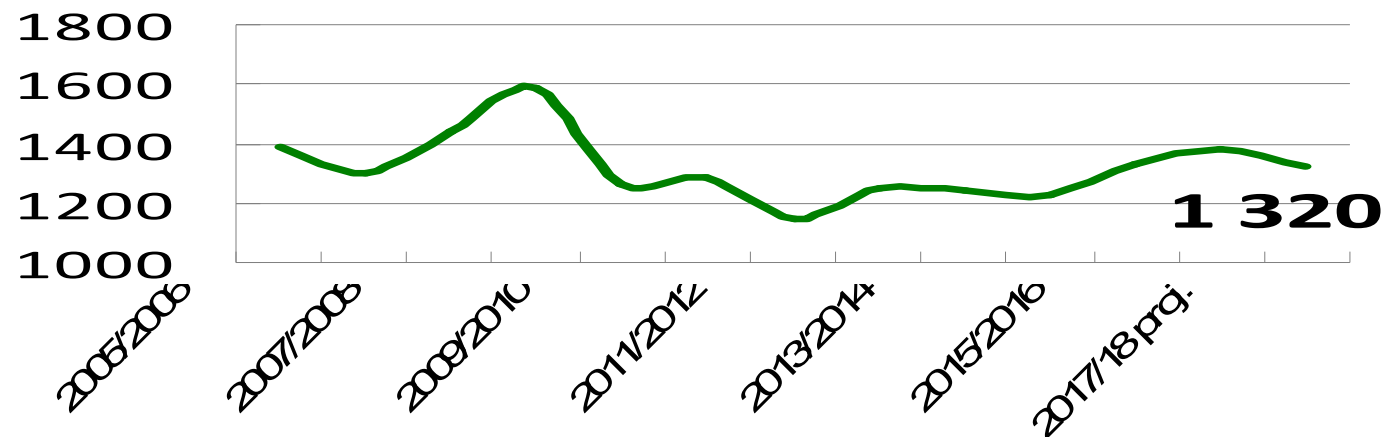
en 1 000 ha



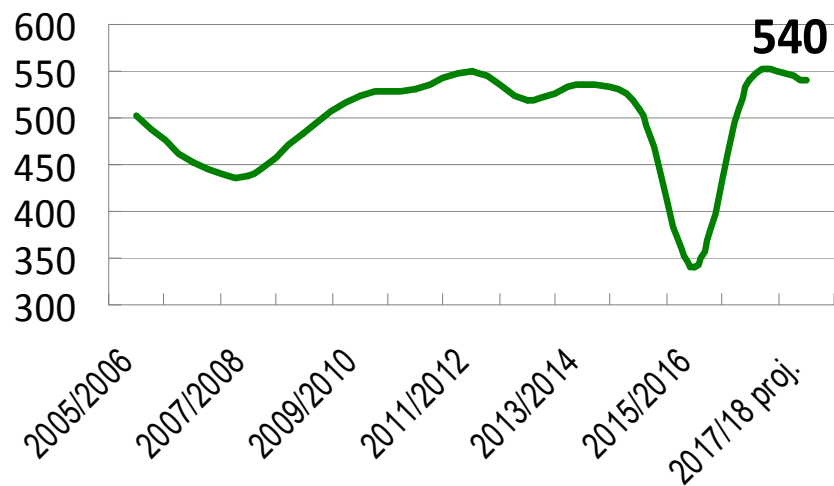


# Superficies de blé dur en Europe

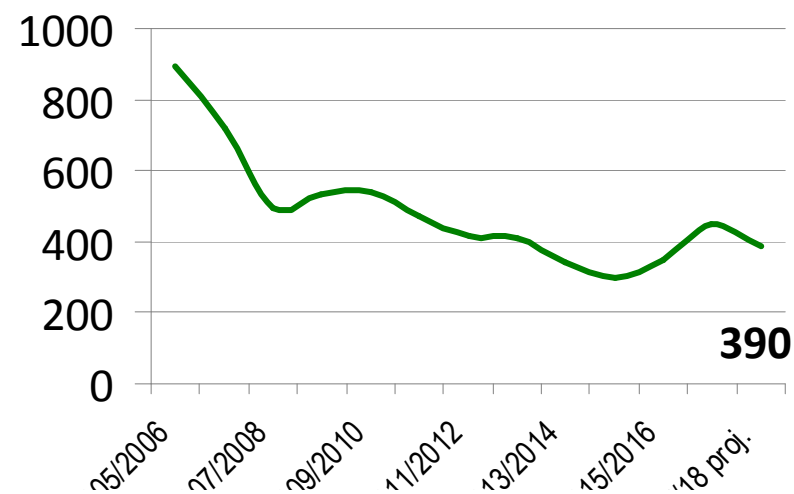
## Italie



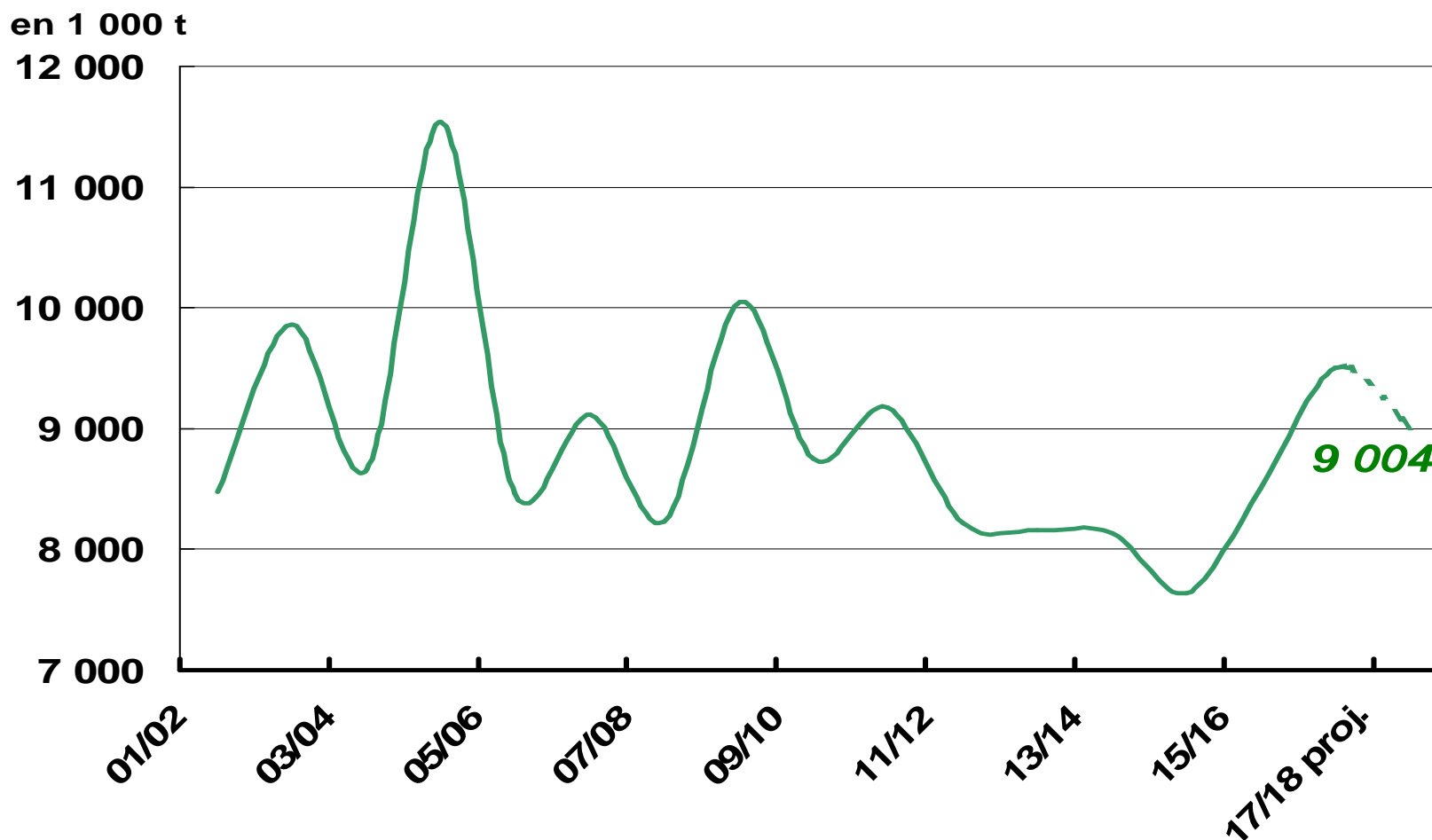
## Grèce



## Espagne

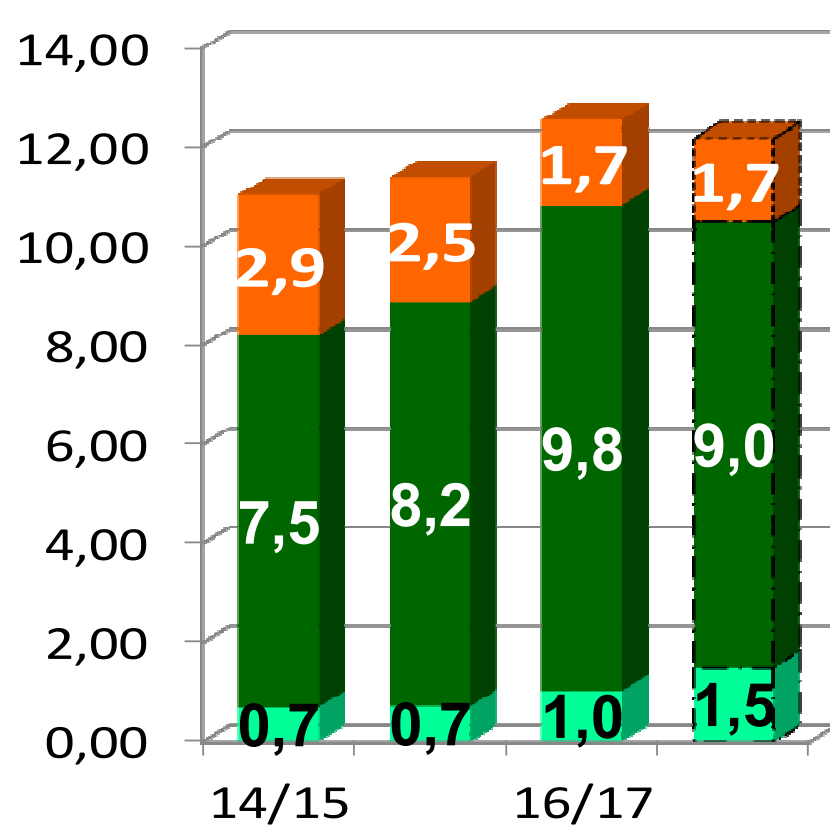


# Production de blé dur en Europe

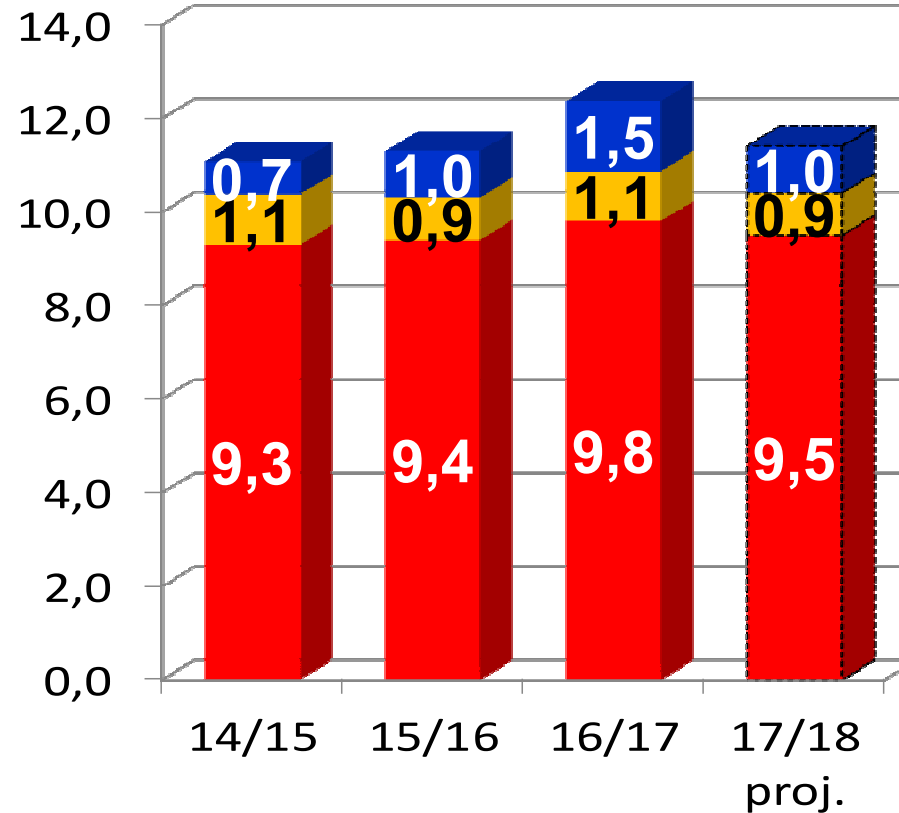


Sources: CIC/ avril 2017

# BILAN BLE DUR de l'Union Européenne 2016/17 et prévisions 2017/18

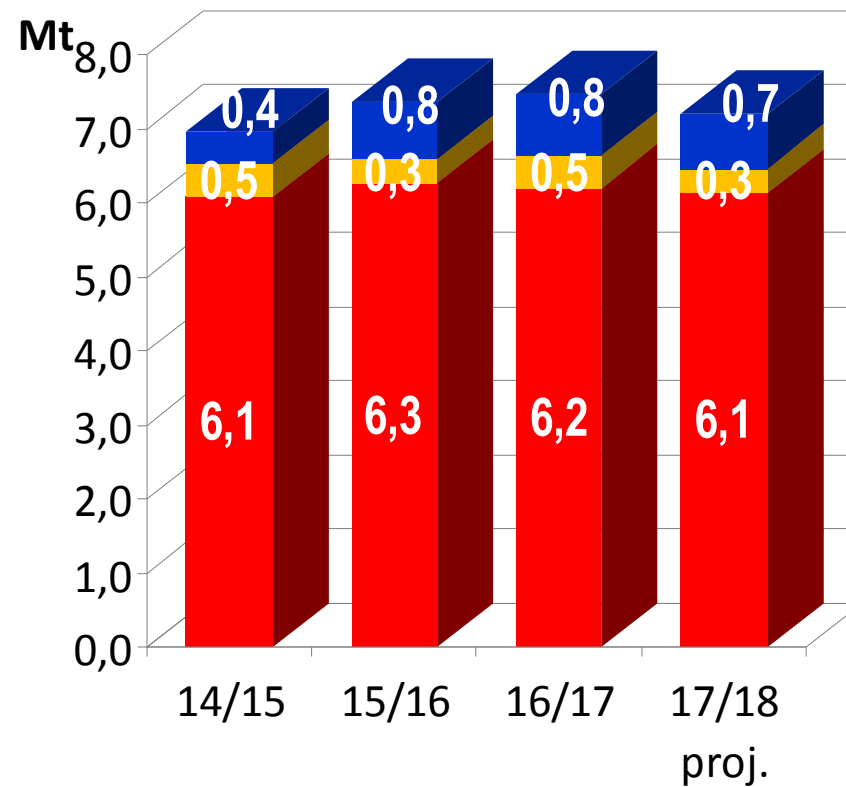
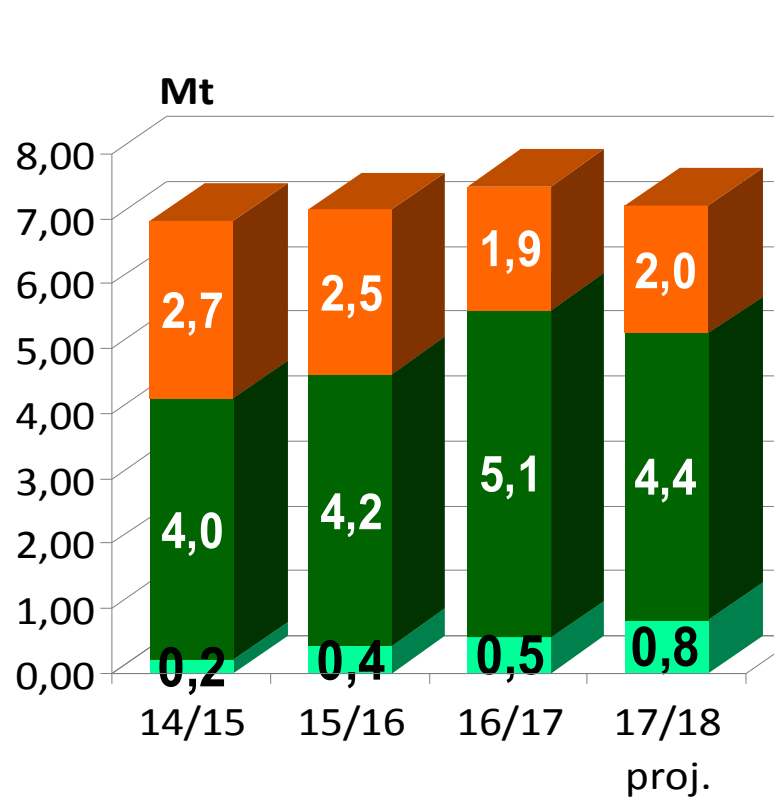


■ Stock initial ■ Production ■ Import



■ Util Interieure ■ Export ■ Stock Fin

# Italie: Bilan 2016/17 et Prévisions 2017/18



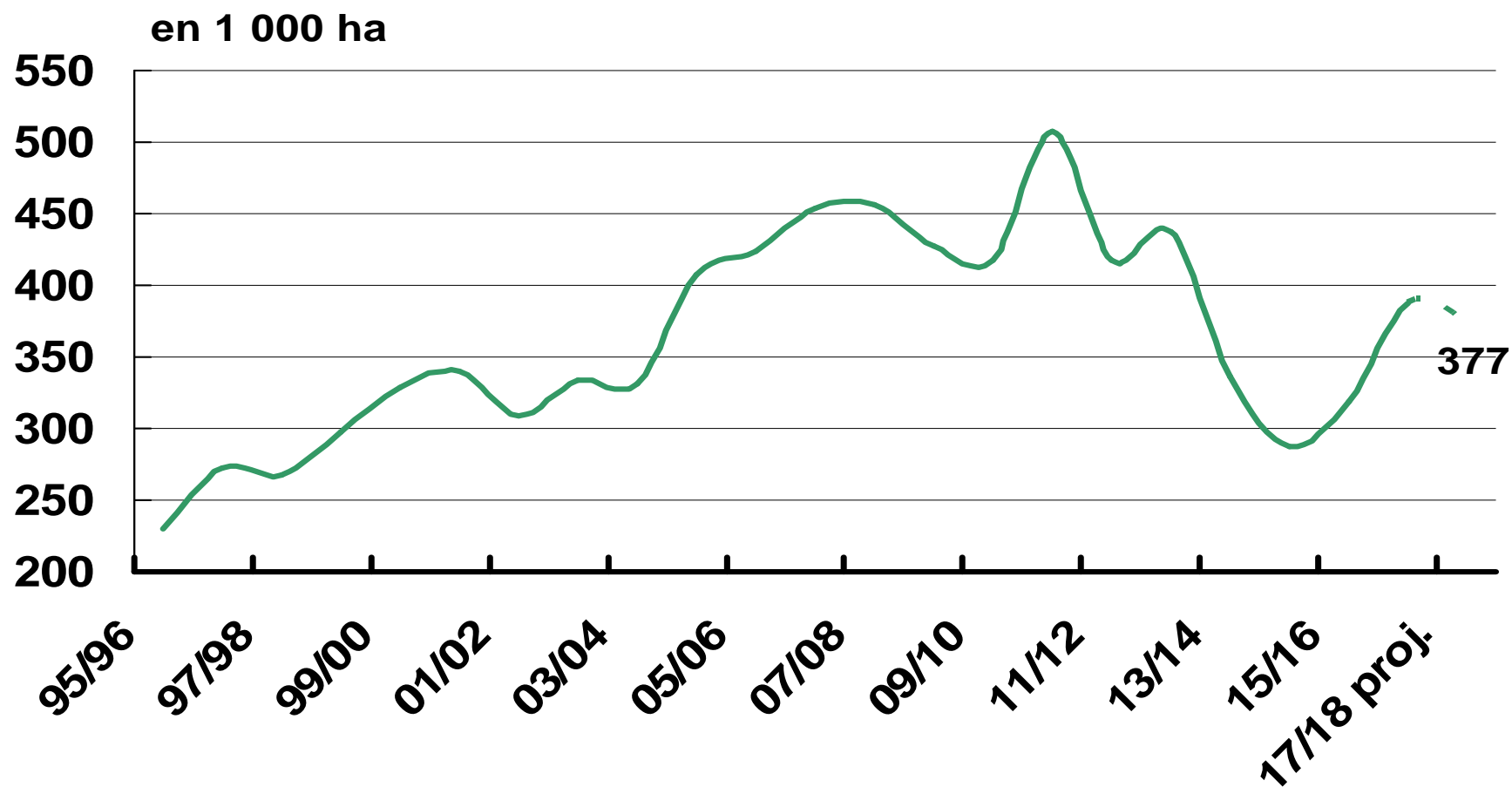
Stock initial Production Import

Conso. Dom Export Stock

Sources: CIC /Stratégies Grains-.avril 2017

# Le Marché français

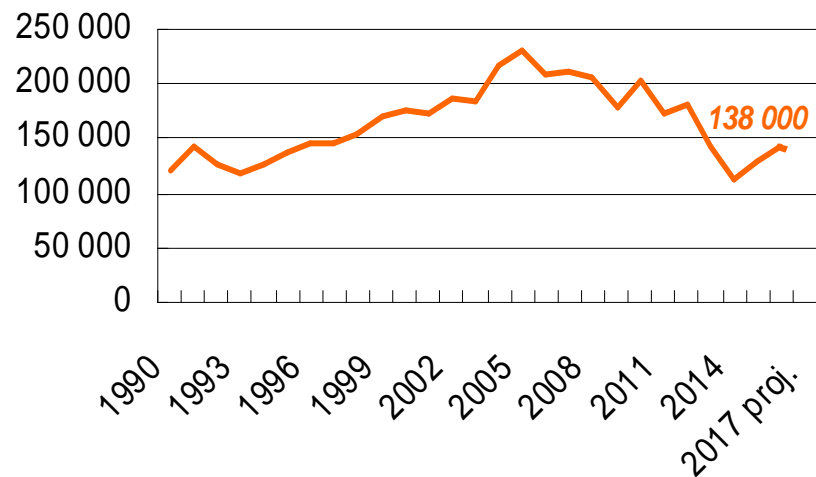
# Surfaces de blé dur en France : un recul de 2,5 % attendu en 2017



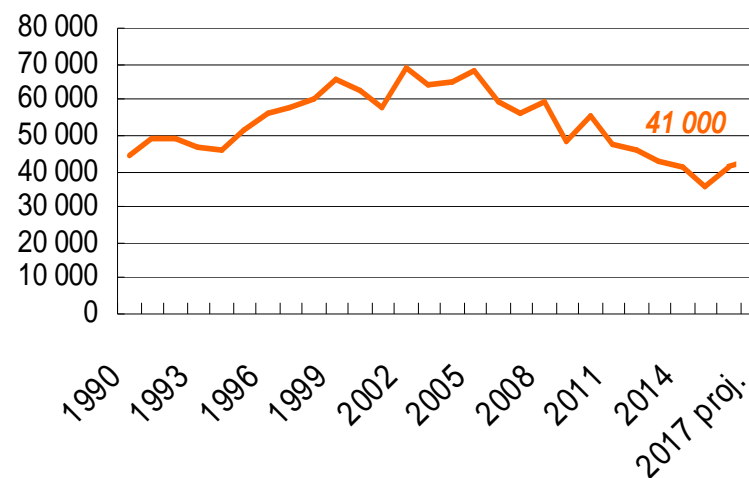
Source: SSP

# Surfaces par région productrice de blé dur

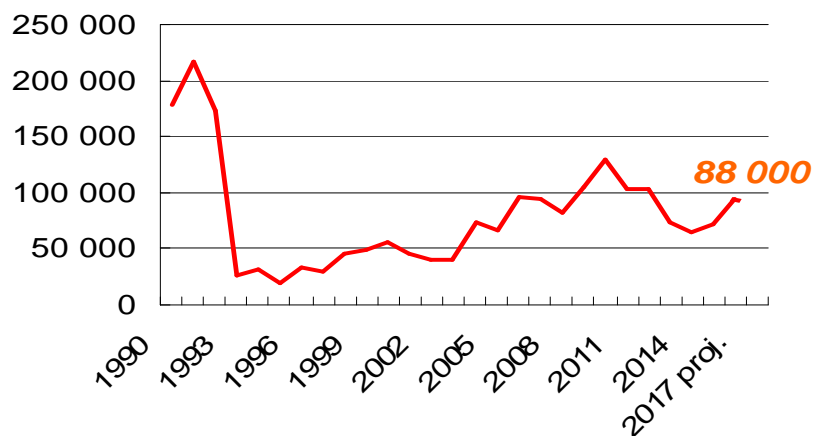
## Occitanie



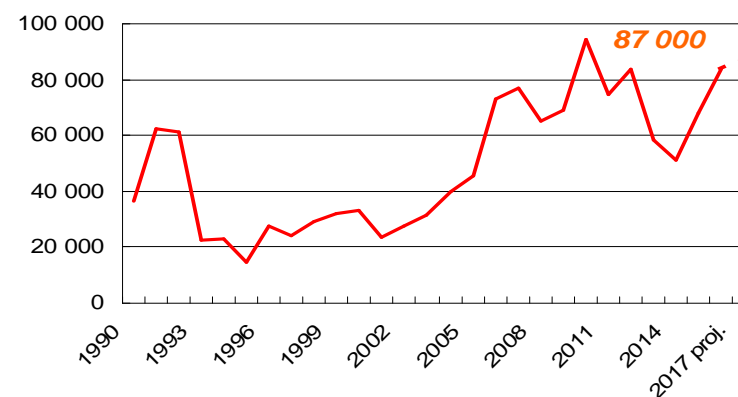
## PACA



## Centre

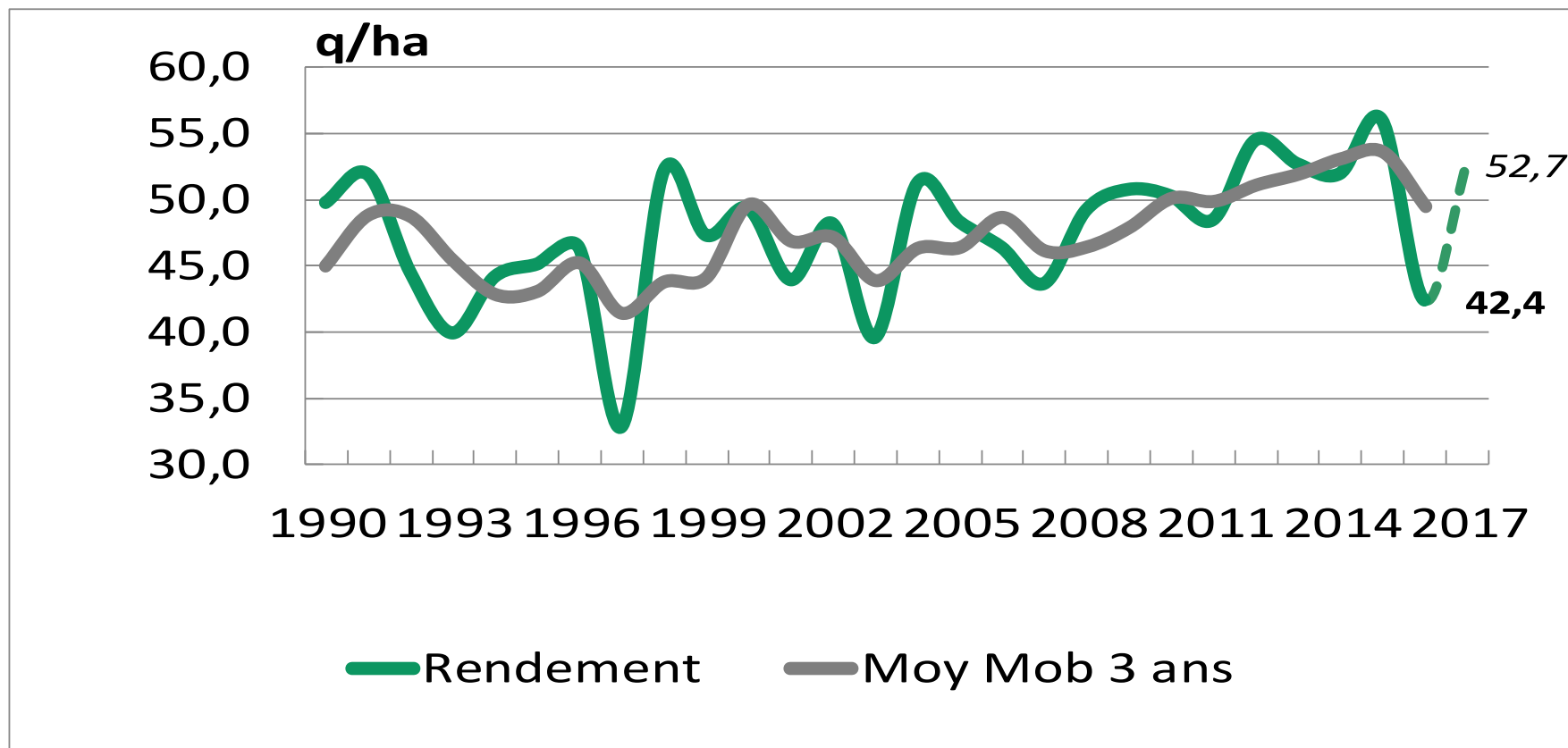


## Ouest-océan



En ha Source FranceAgriMer et SSP

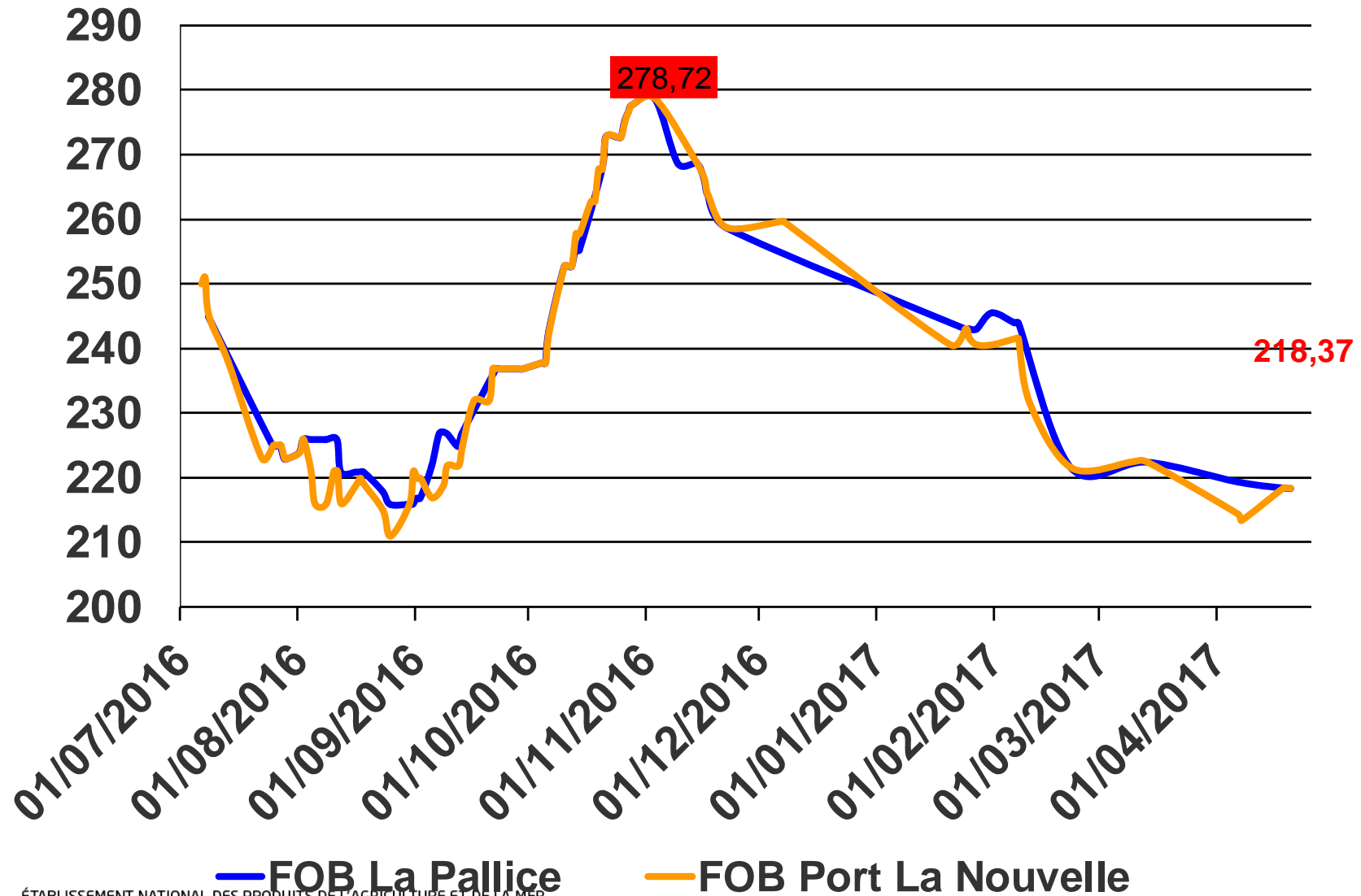
# Rendement du blé dur en France



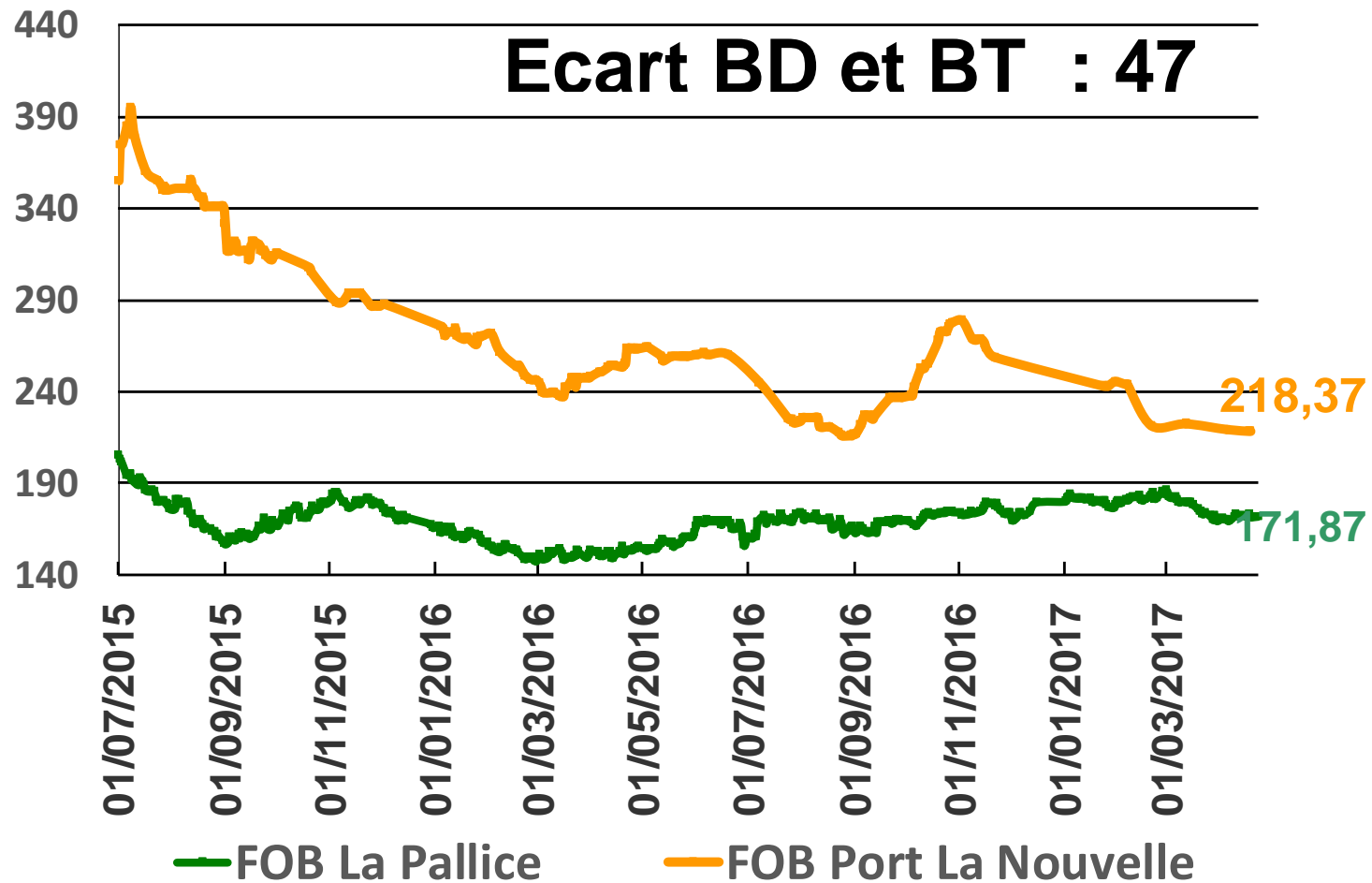
Source: SSP



# Cours du blé dur en France



# Cours des blés durs et tendres





**Merci de votre attention !**

# FranceAgriMer

## Conseil Spécialisé Céréales

