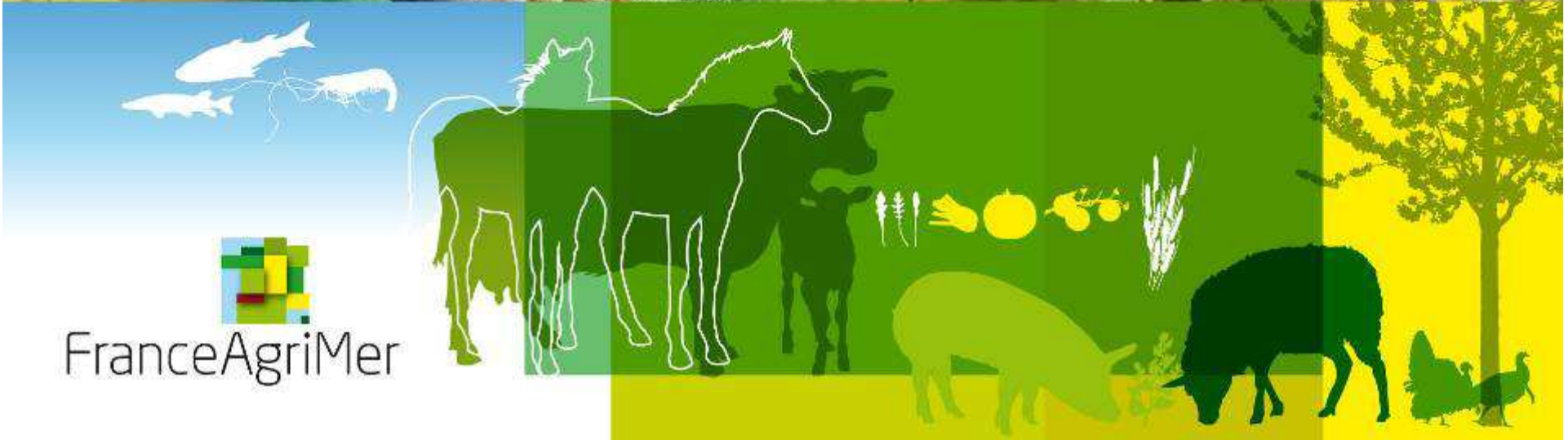


CÉRÉALES /  
FRUITS ET LÉGUMES /  
HORTICULTURE /  
LAIT /  
OLÉO-PROTÉAGINEUX /  
PÊCHE ET AQUACULTURE /  
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /  
SUCRE /  
VIANDES BLANCHES /  
VIANDES ROUGES /  
VINS /

# FranceAgriMer



  
FranceAgriMer

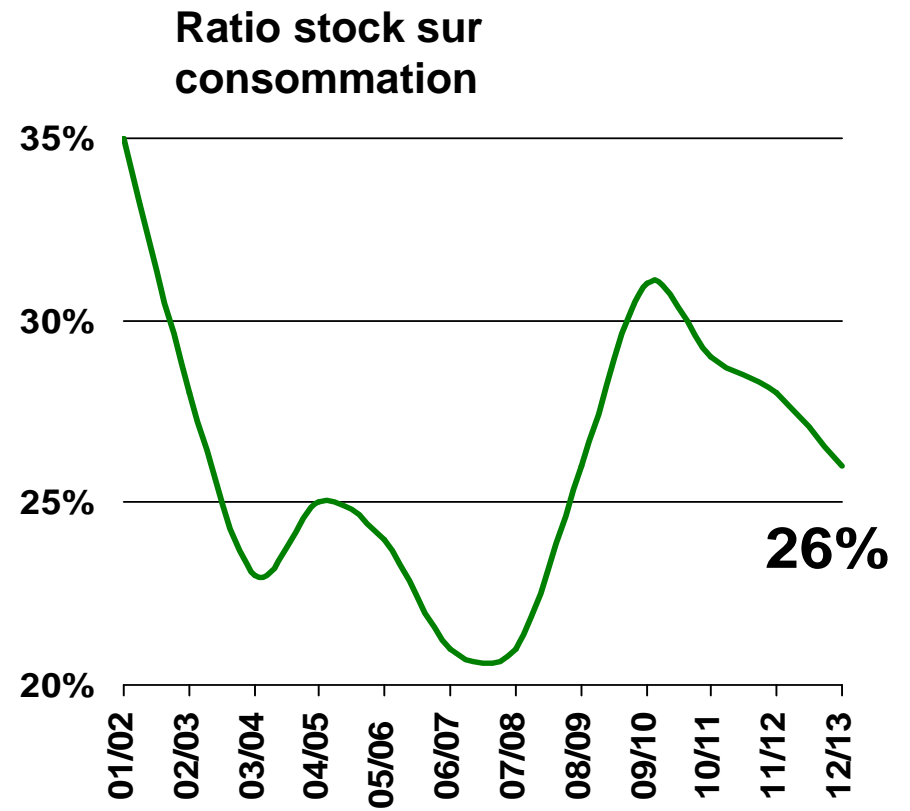
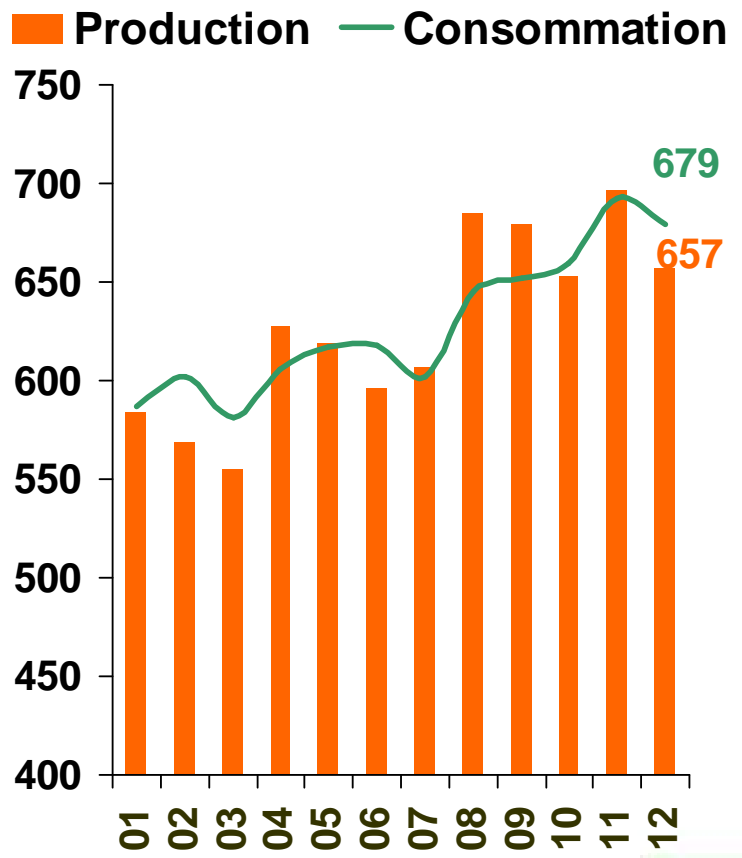
# Points clefs

- Bilan blé déficitaire
  - Sécheresse en Russie
  - Consommation en hausse
  - Forte demande pour le blé français
- Bilan maïs déséquilibré
  - Chute de la production aux Etats Unis
  - Quid du Brésil et de l'Argentine ?

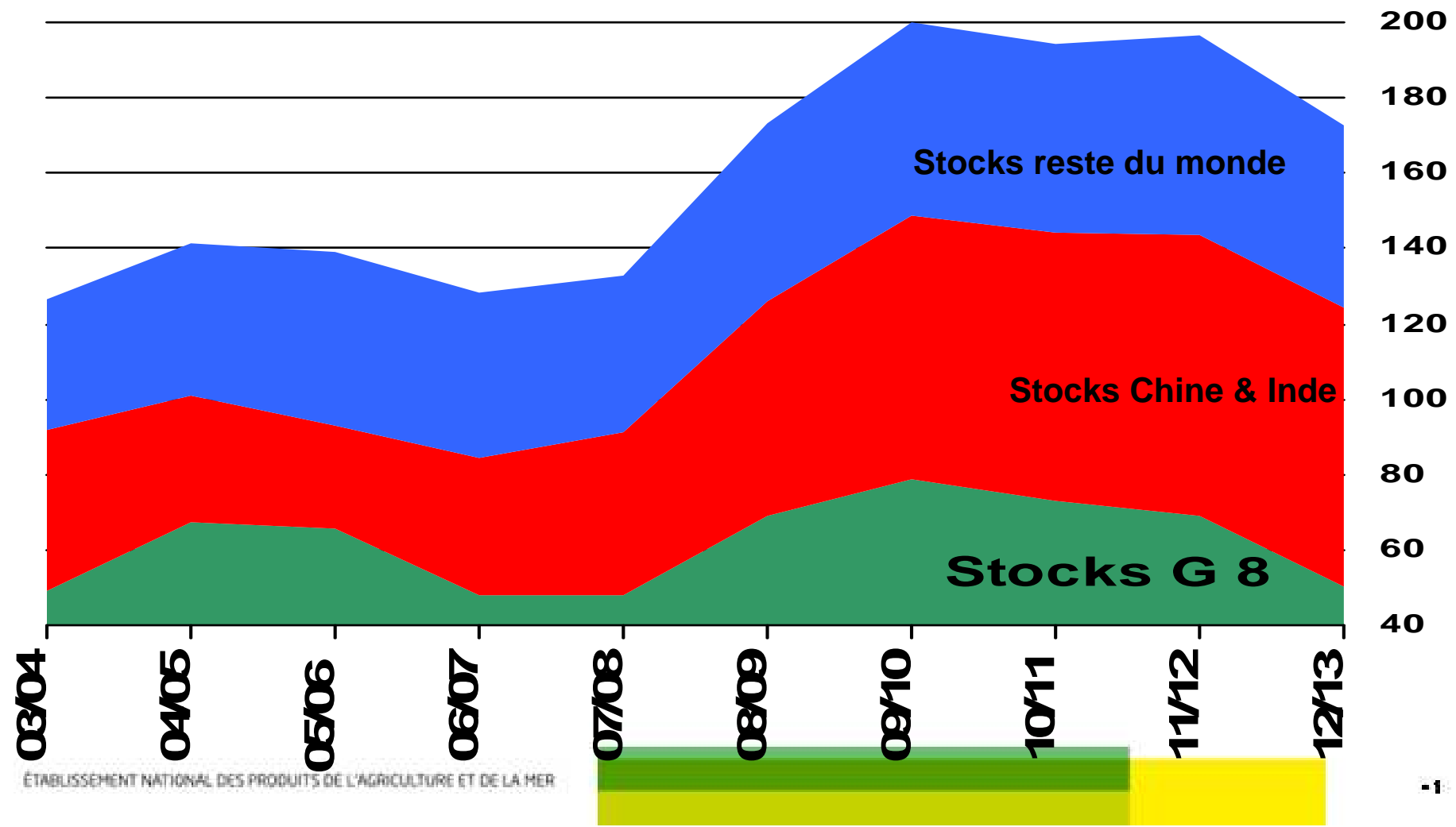


# Marché mondial

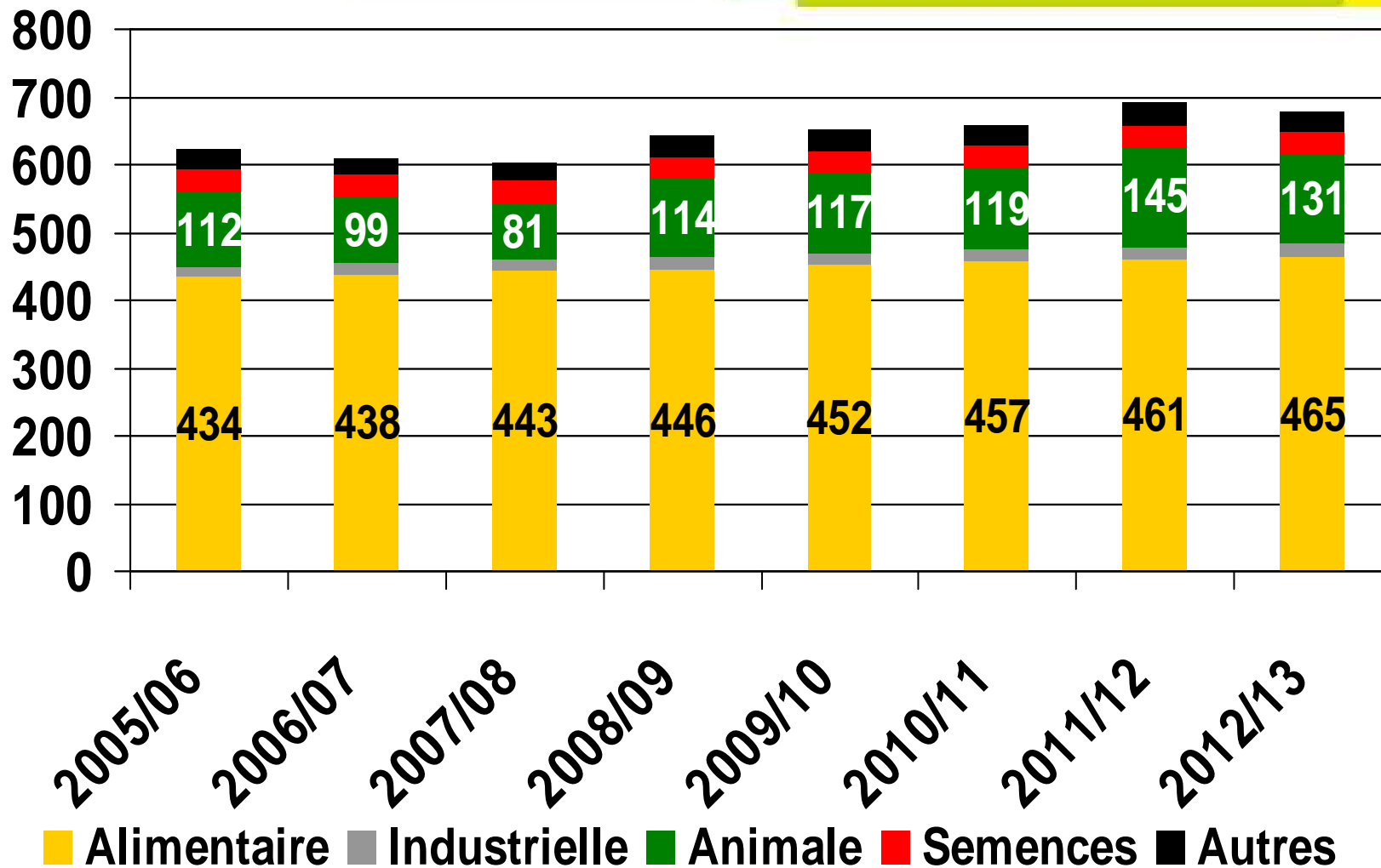
# Bilan mondial blé 2012/13 : production, consommation et stocks



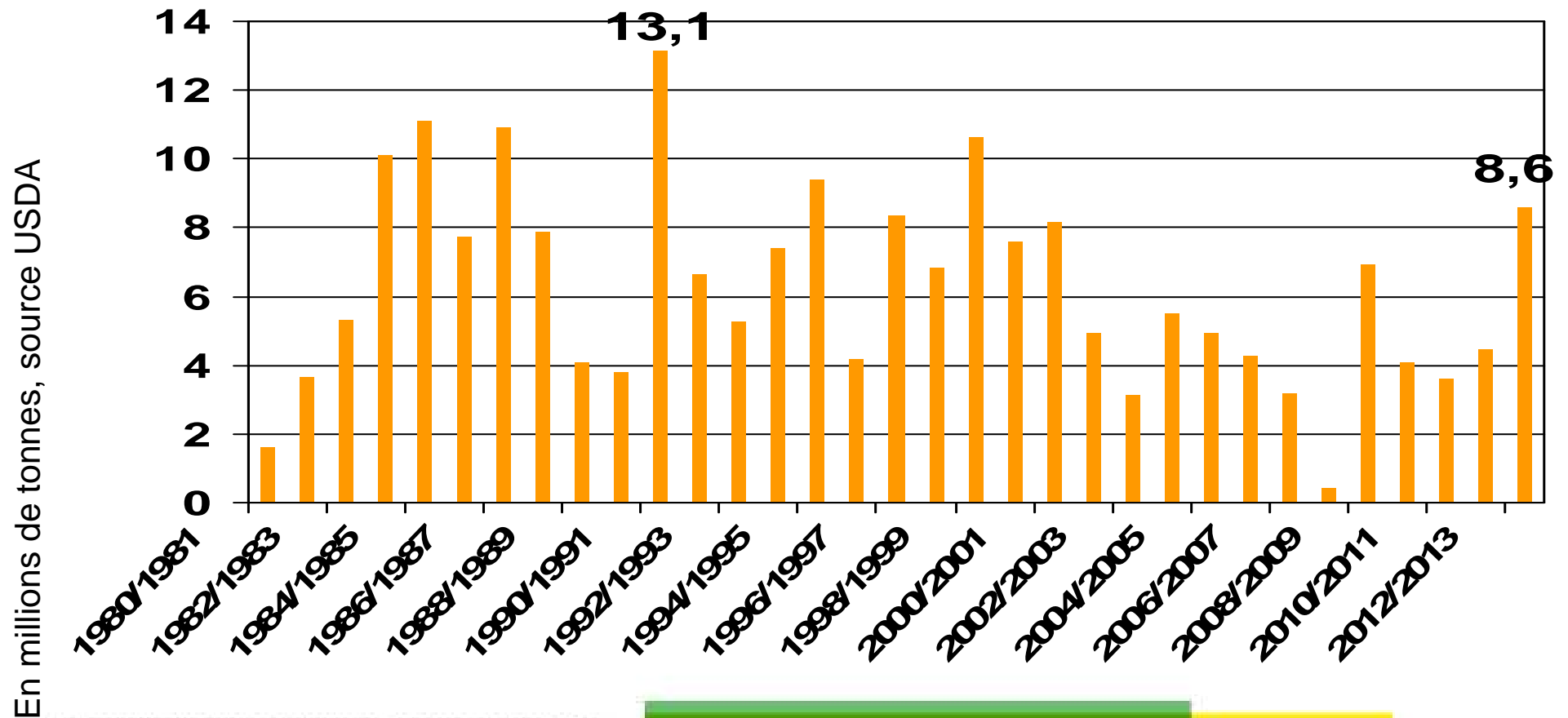
# Répartition des stocks mondiaux de blé en 2012/13



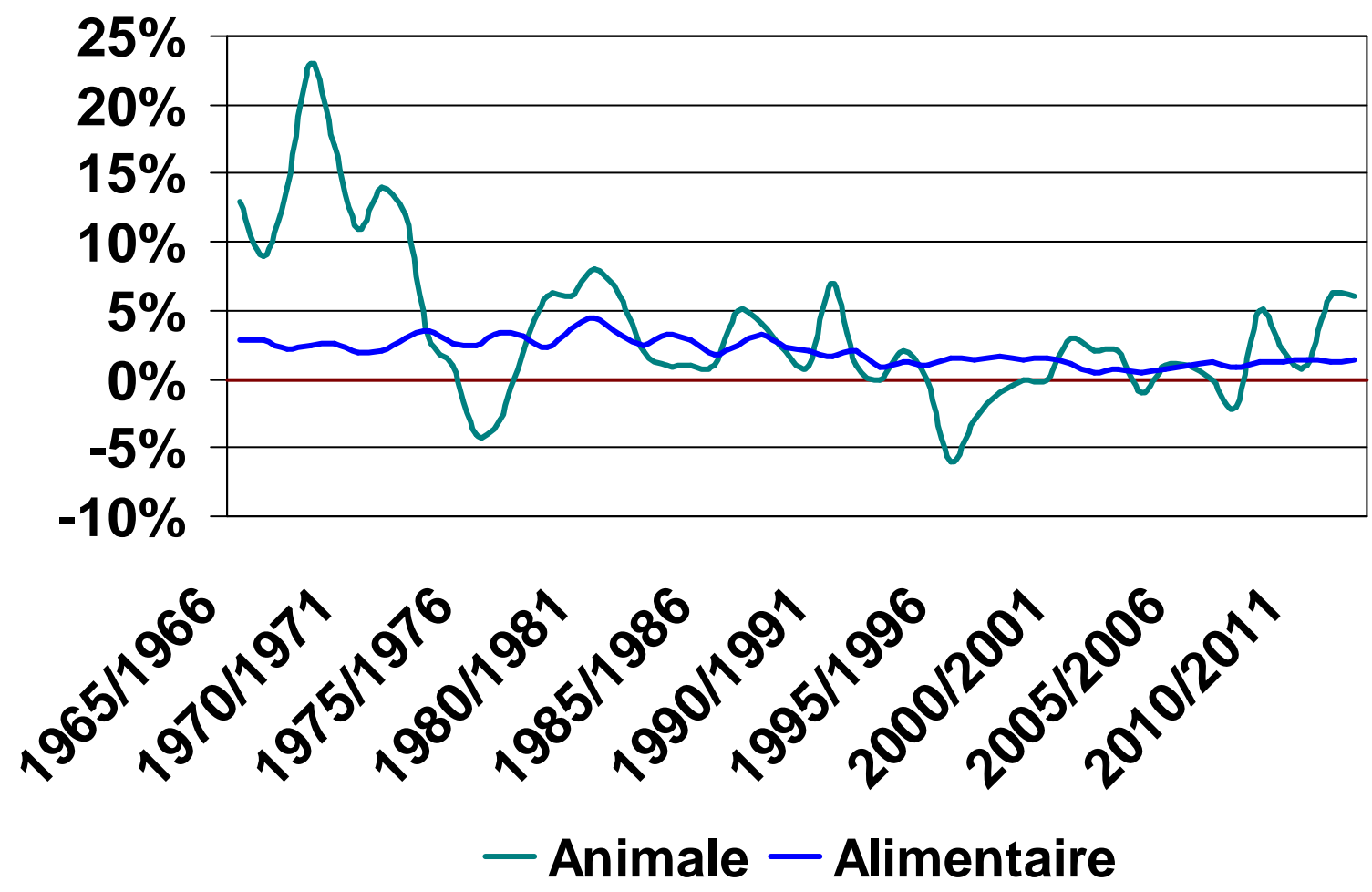
# Consommation mondiale de blé



## Blé américain : consommation animale



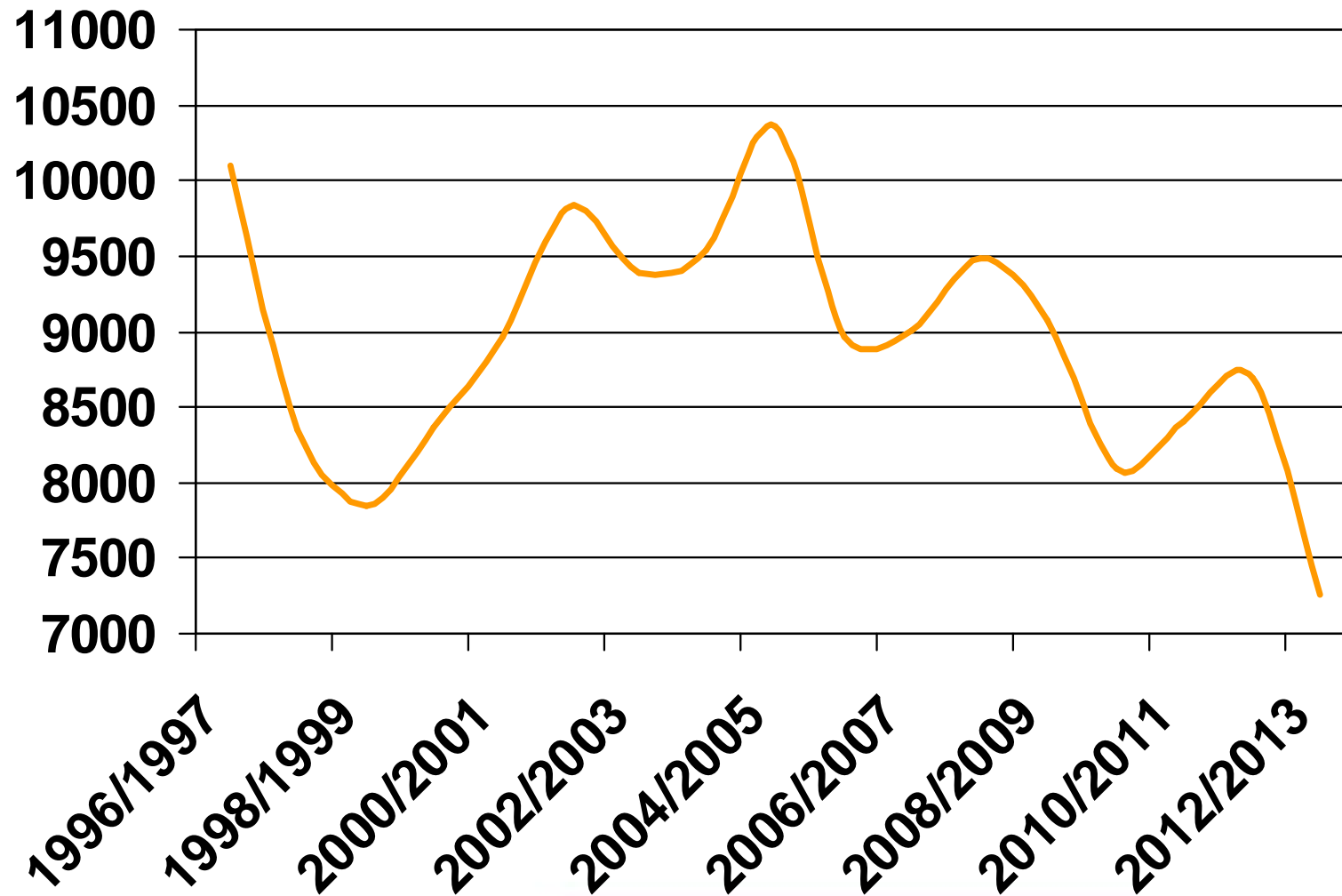
# Taux de croissance de la consommation mondiale de blé



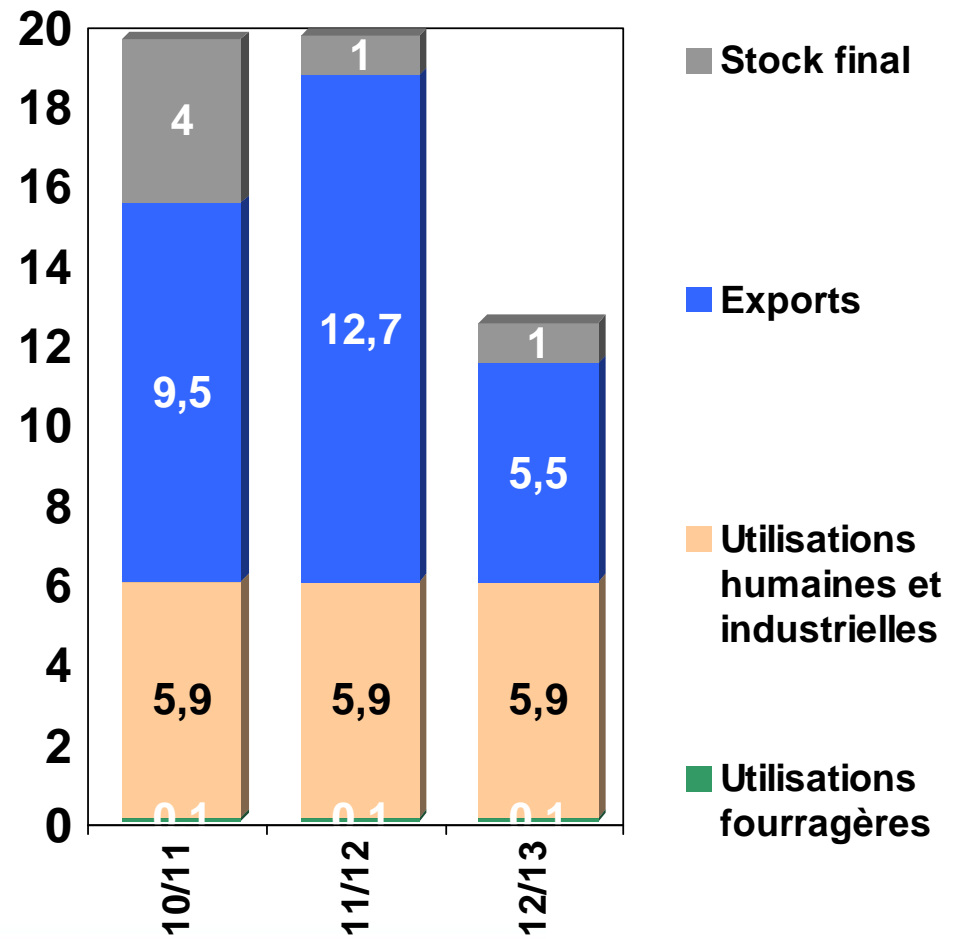
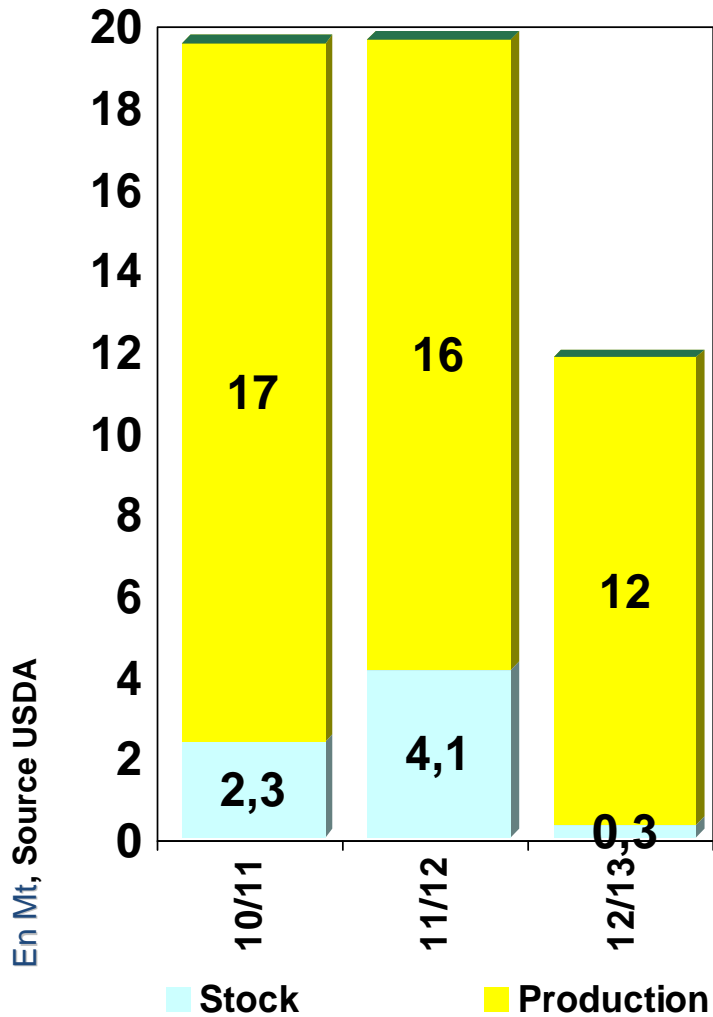


## Surfaces dédiées au blé Mercosur

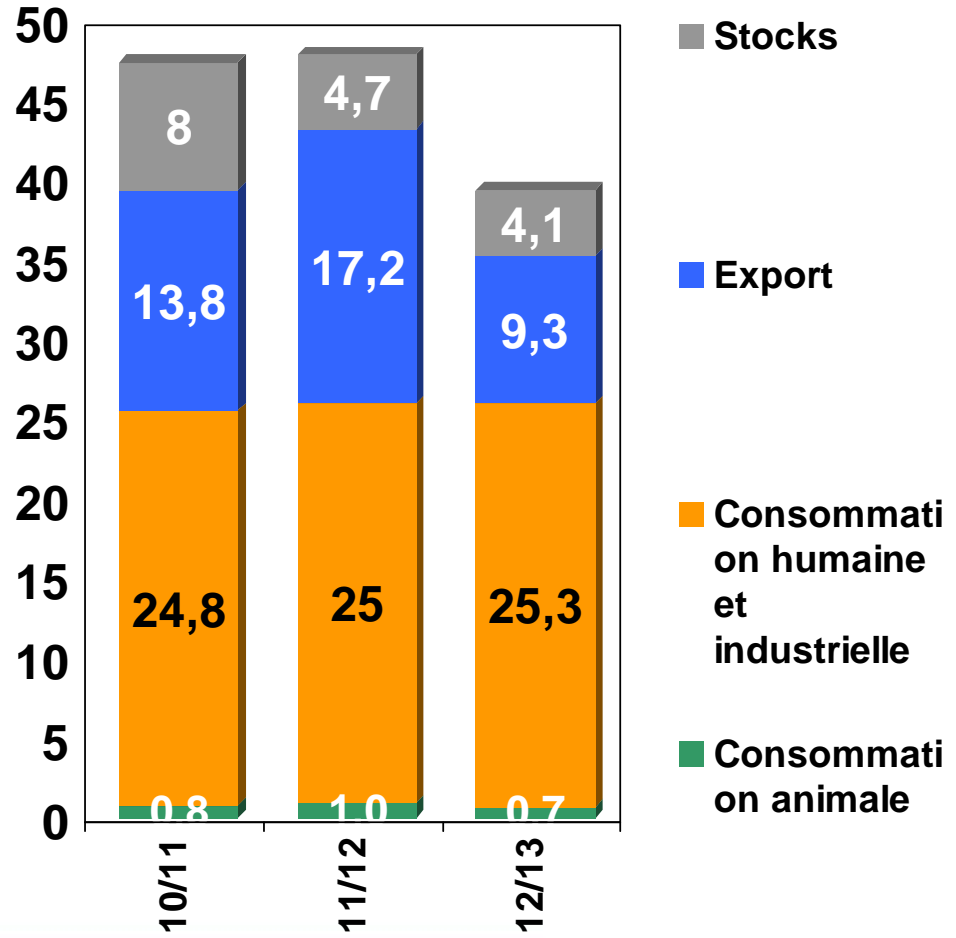
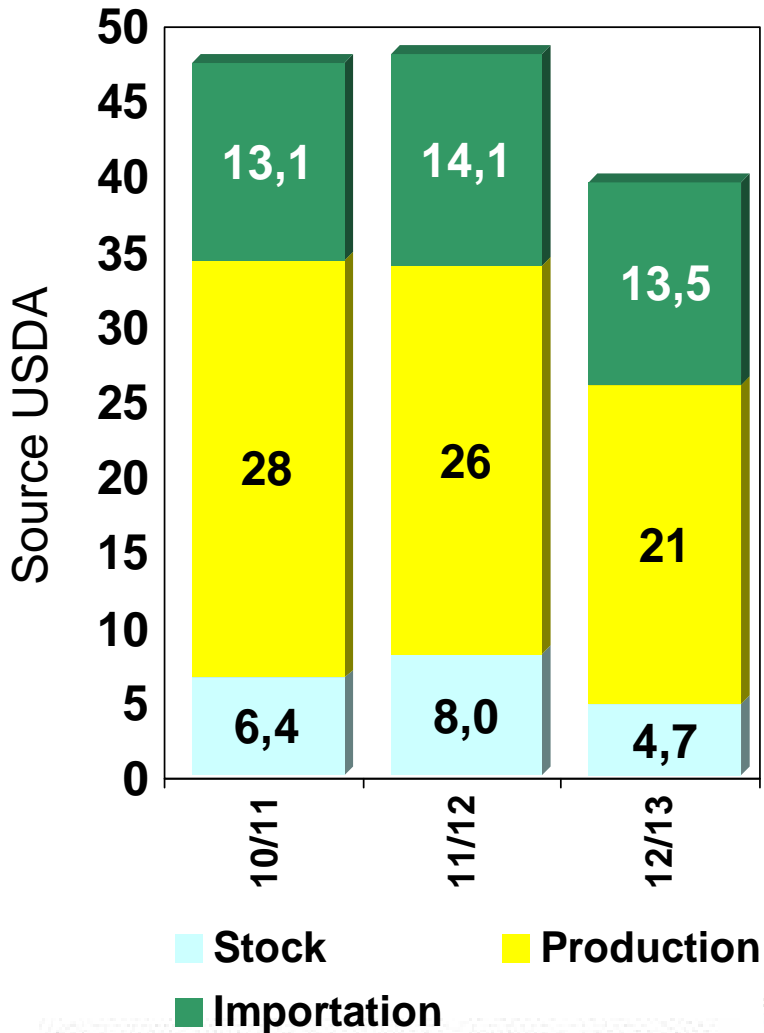
En 1 000 ha, source : USDA



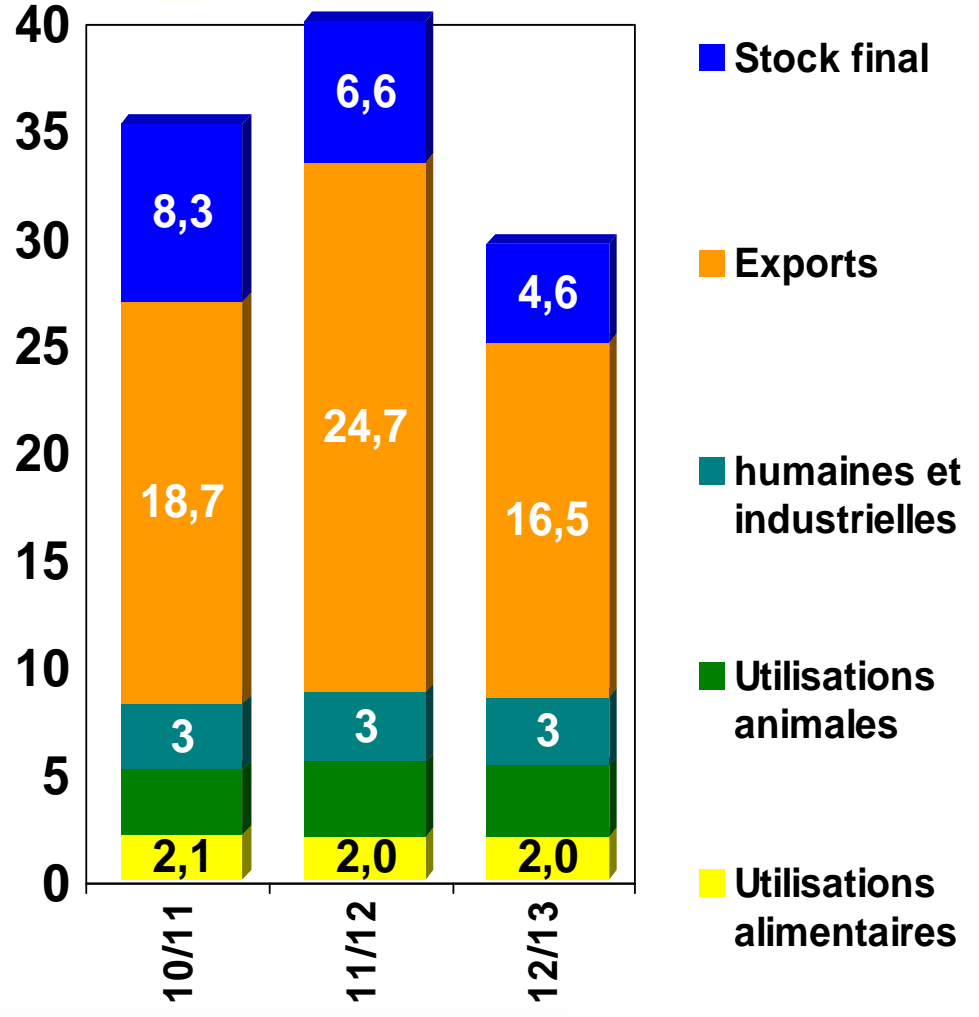
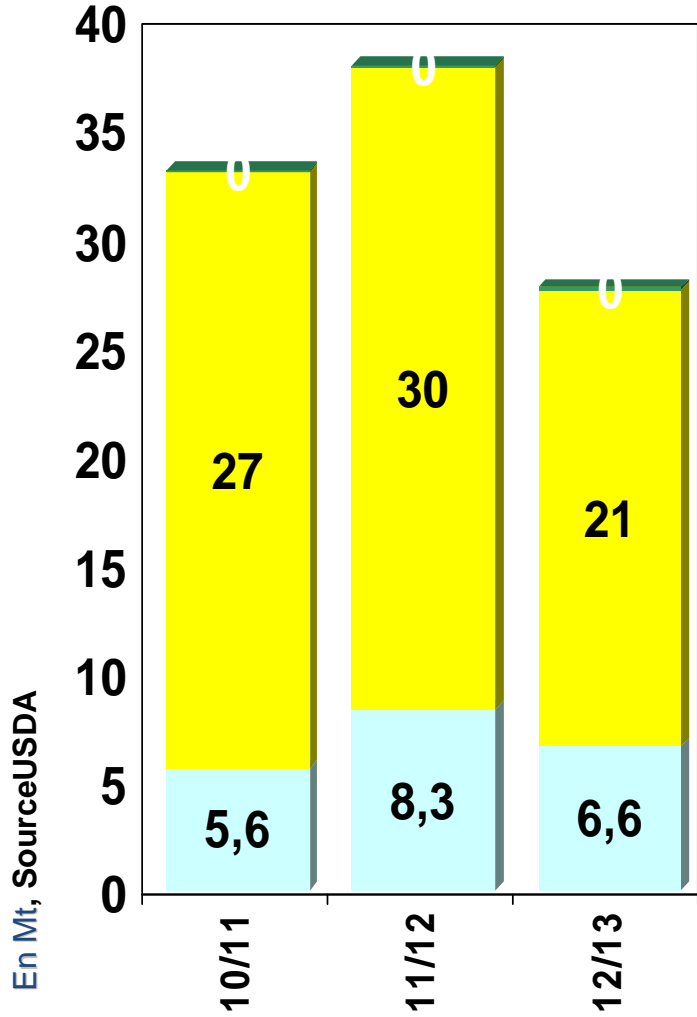
# Argentine : bilan blé



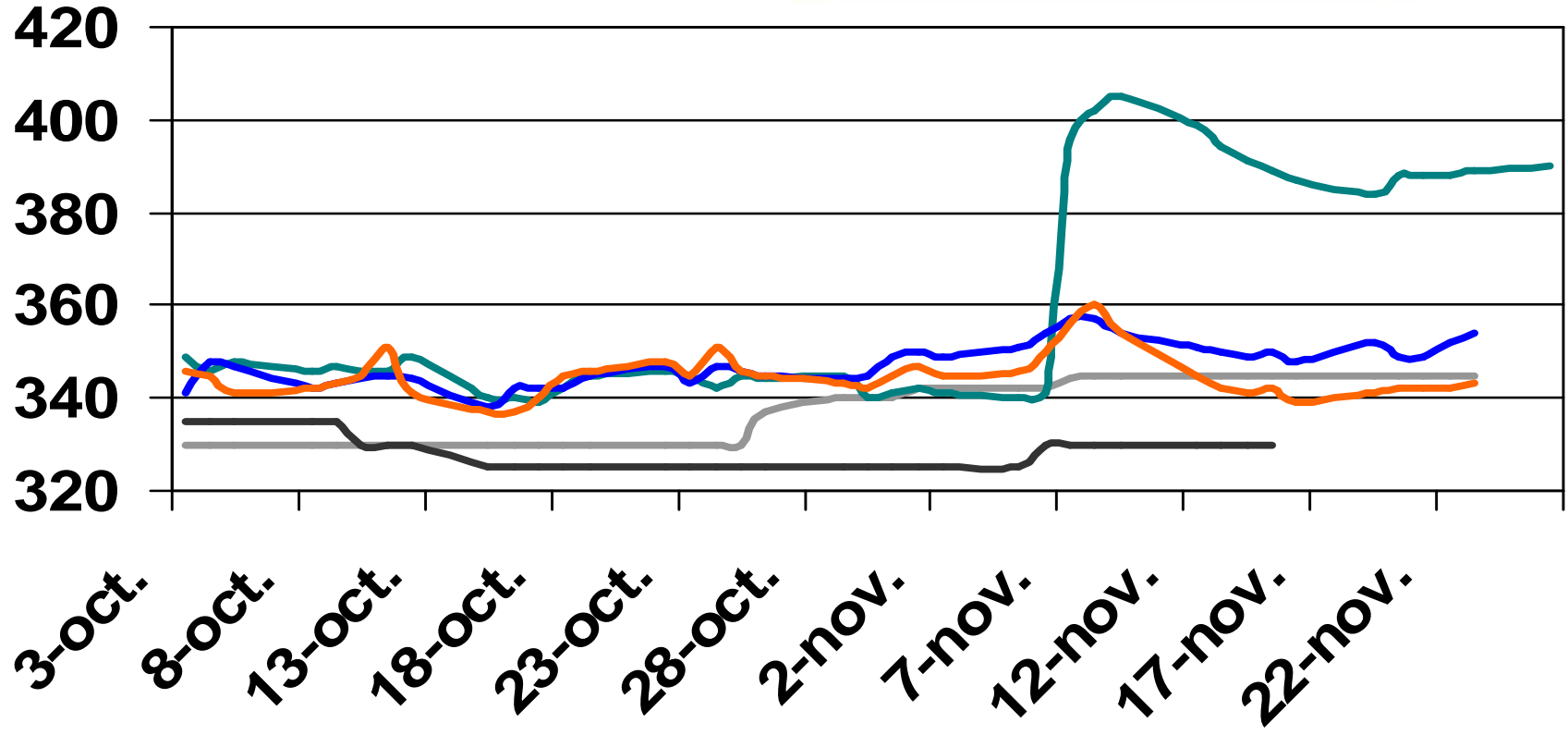
# Bilan blé Amérique du Sud



# Australie : bilan blé



# Cours du blé

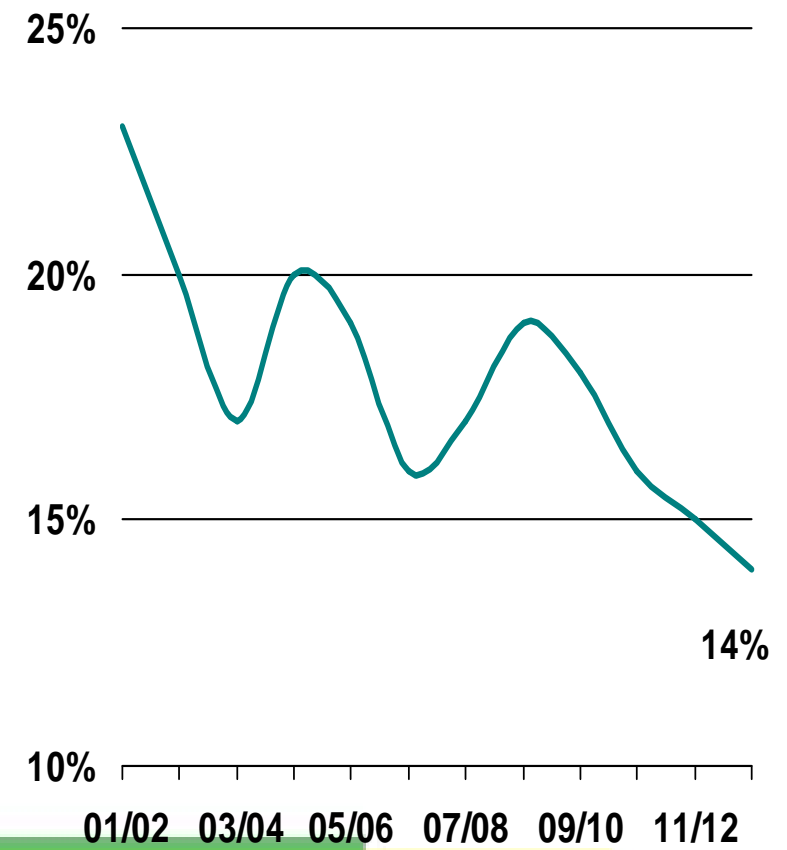
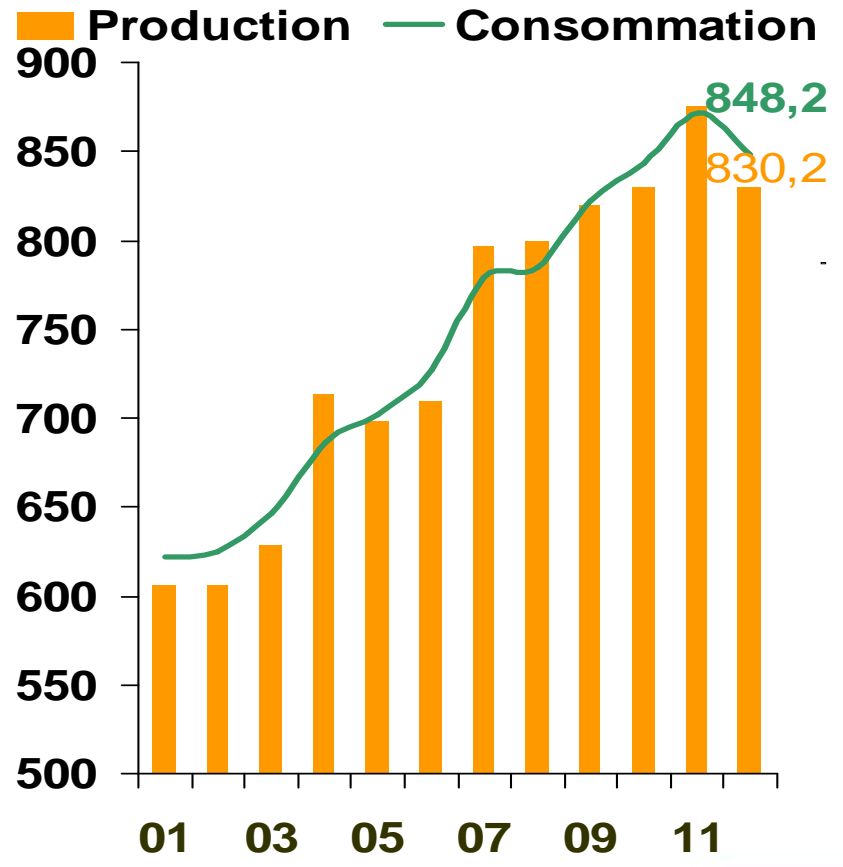


- Argentin Up River
- Fouurrager mer Noire
- SRW fob
- Blé blanc Australie orientale
- Fob Rouen



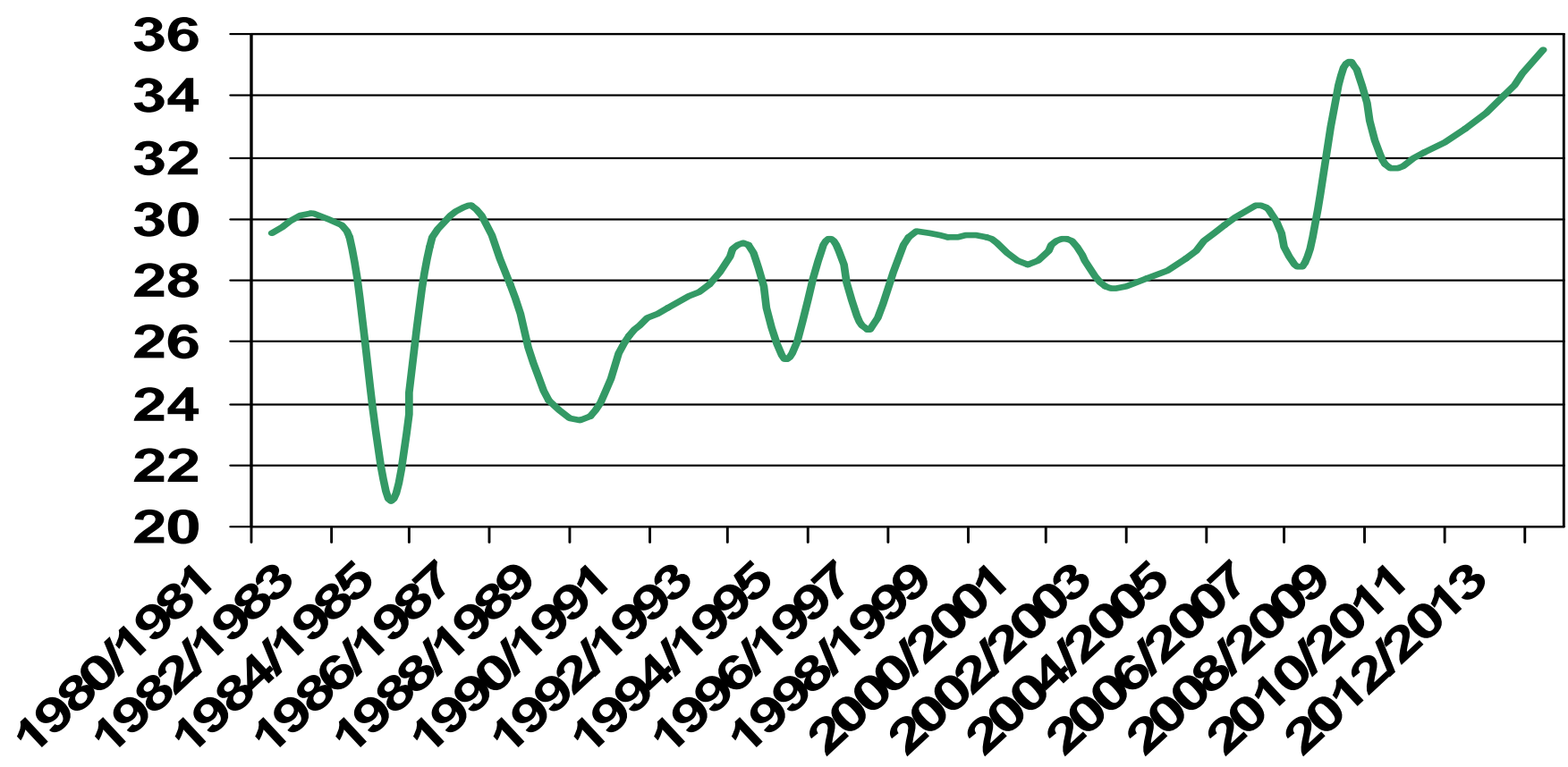
# Bilan mondial maïs 2012/13

Ratio stock sur consommation

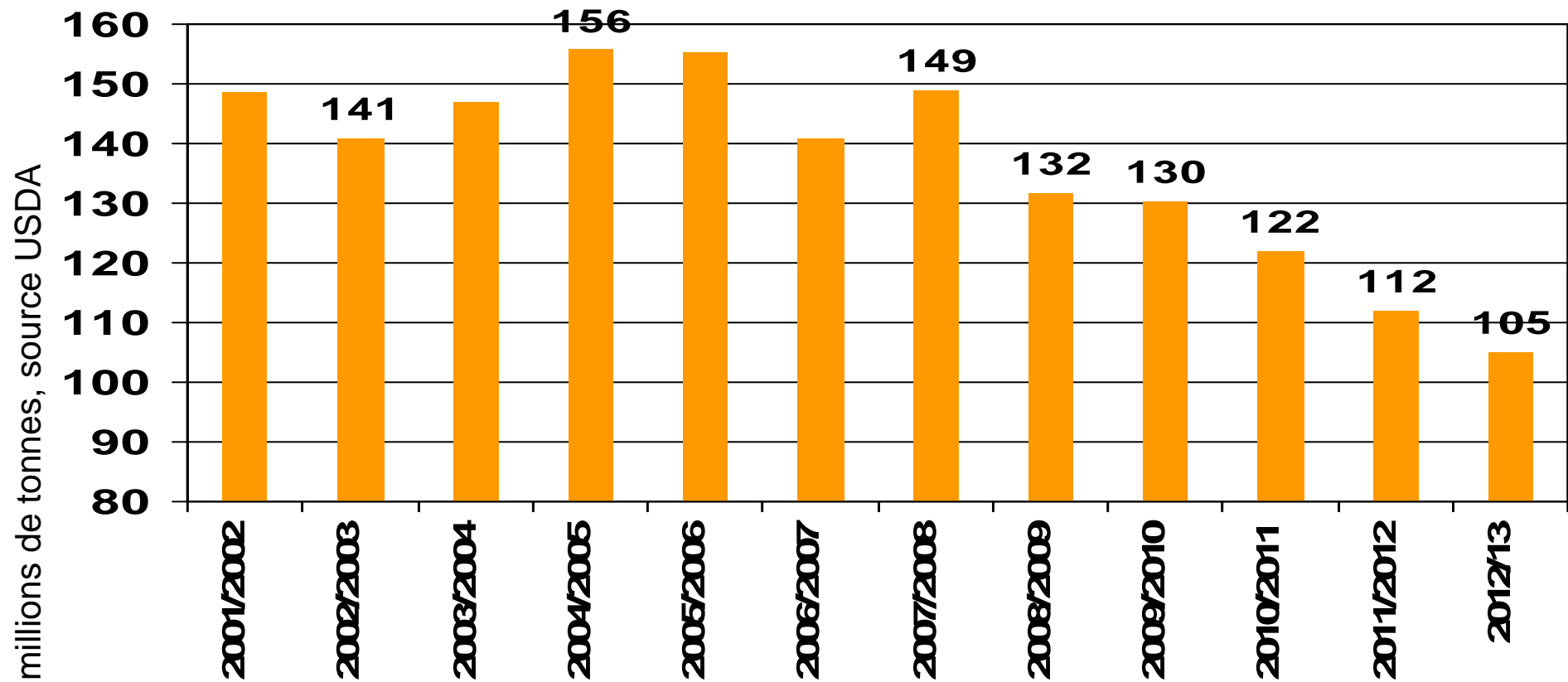


# Surfaces de maïs récoltées aux Etats Unis

En Mha, source USDA

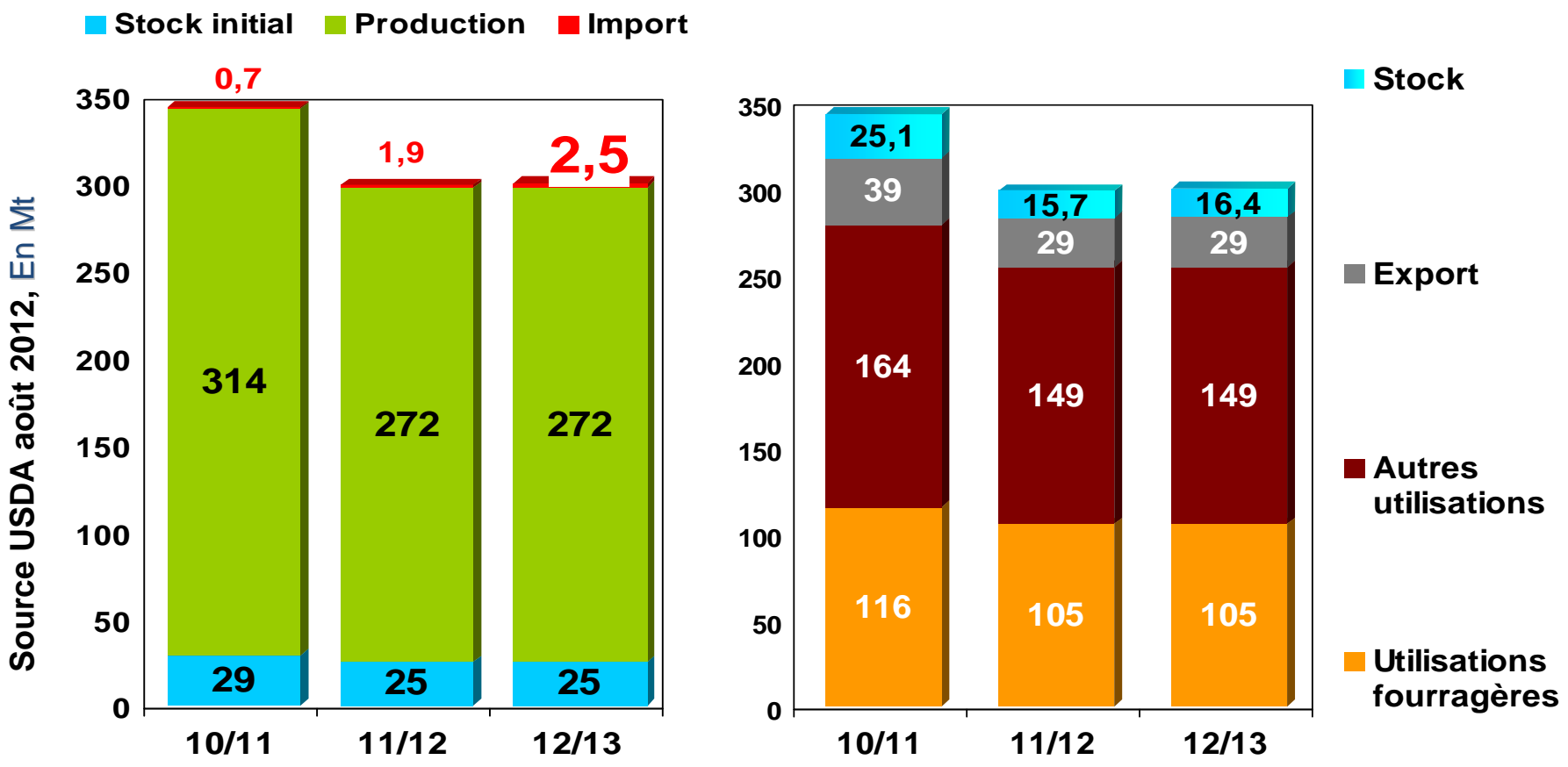


## Mais américain : consommation animale





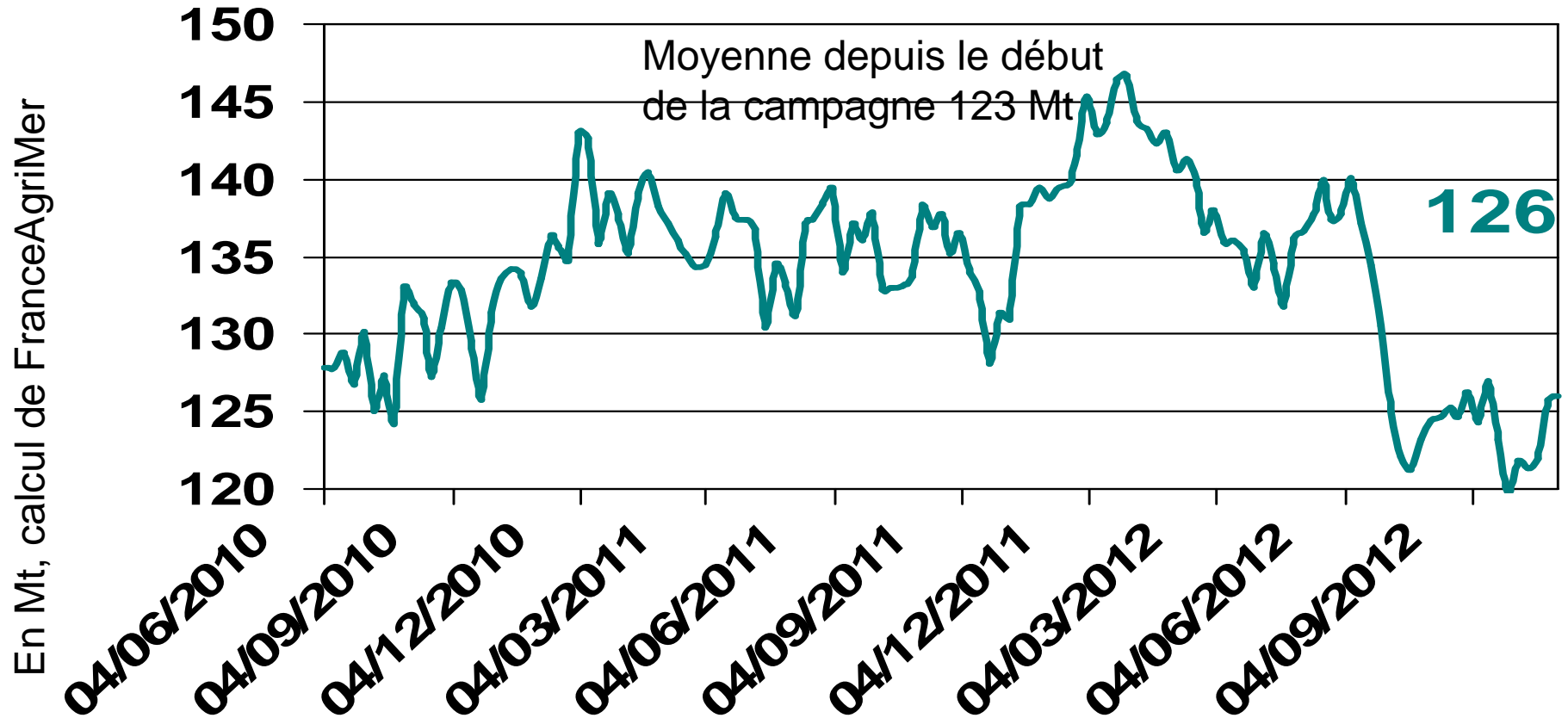
# Etats-Unis, bilan maïs 2012/13 : un stock attendu de l'ordre de 16 Mt



# Production d'éthanol et consommation de maïs

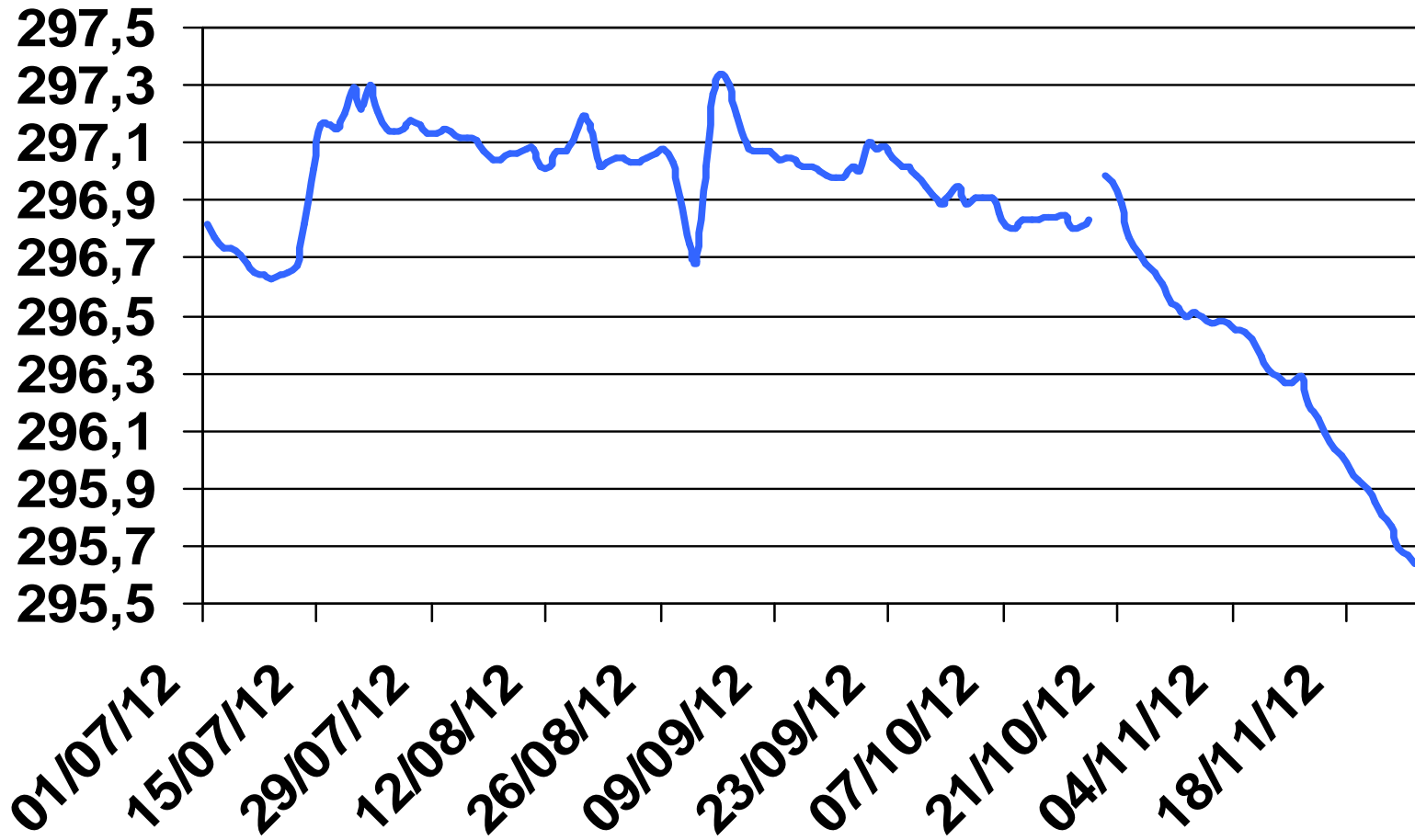
- Volume d'éthanol produit et tonnage de maïs utilisé
- **1 boisseau de maïs => 2,8 gallons d'éthanol**
- Sachant que : 1 boisseau US de maïs vaut 0,02540 tonne (25,4 kg)
- 1 gallon = 3,78541178 litres donc 2,8 gallons = 10,599 litres
- On a l'équivalence : 25,4 kg de maïs => 10,599 litres d'éthanol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



# Hauteur du Mississippi à Jackson, Louisiane

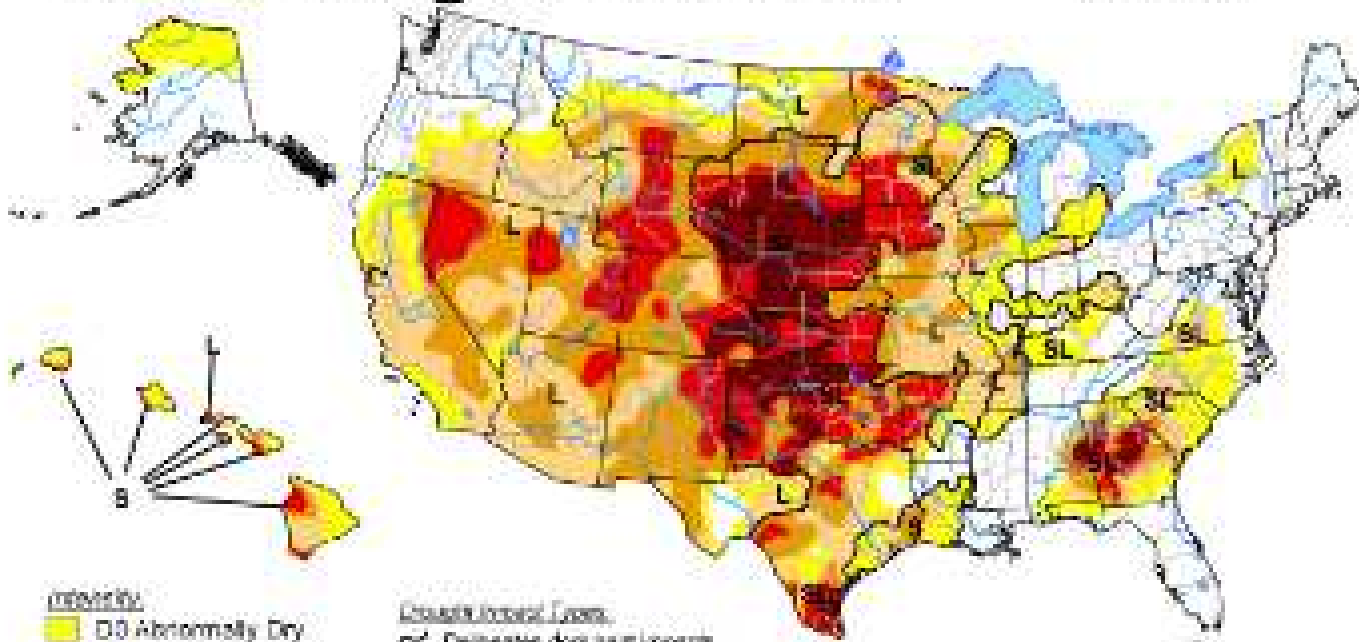
En pieds américains, source : USGeological Survey



# U.S. Drought Monitor

## U.S. Drought Monitor

November 20, 2012  
Valid 7 a.m. EST



**Intensity**

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

**Counts Local Units**

- M** - Delineates drought-impacted
- S** - Short-Term, typically <60 months (e.g. agriculture, grasslands)
- L** - Long-Term, typically >60 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/>

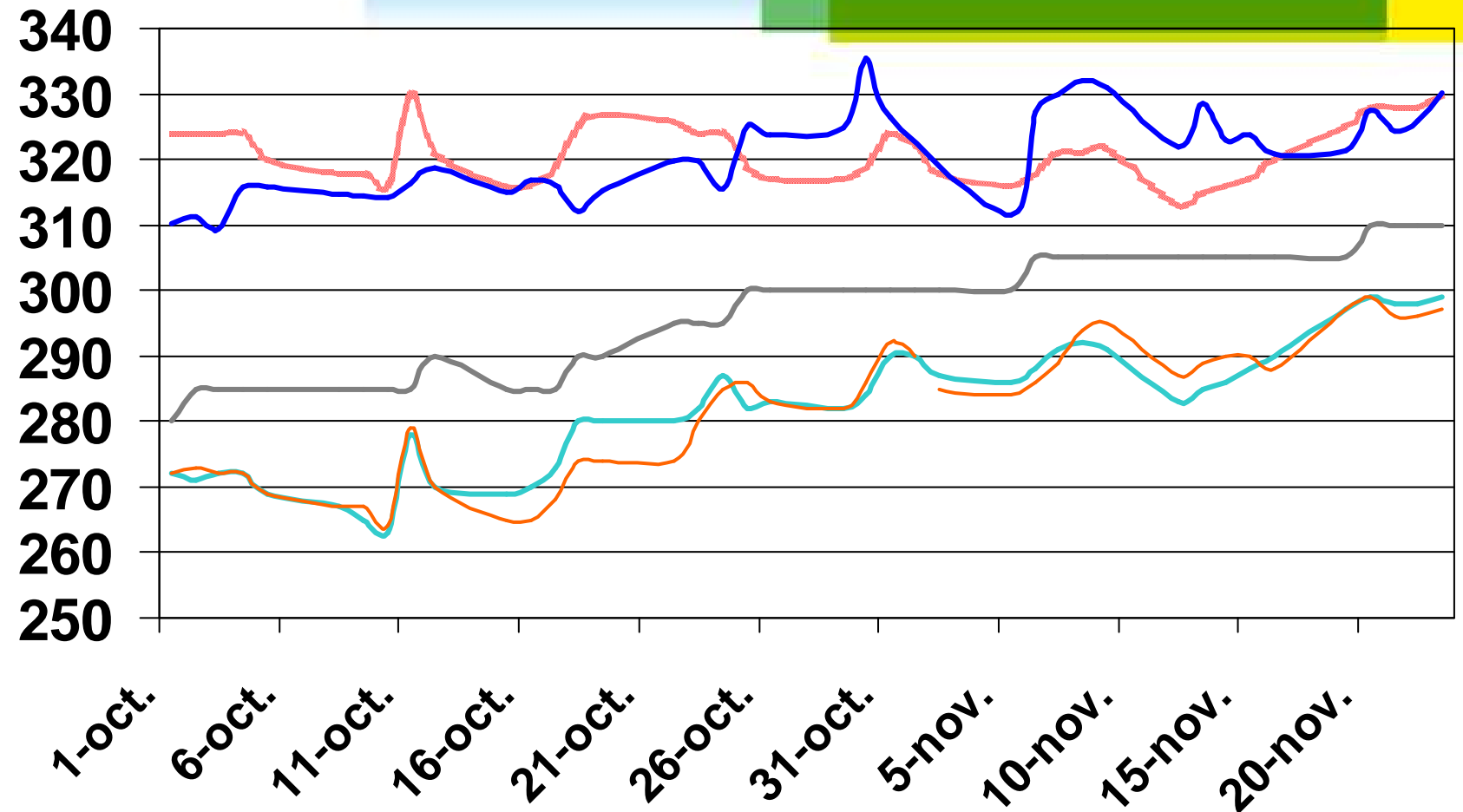


Released Wednesday, November 21, 2012  
Author: Eric Luebbehusen, U.S. Department of Agriculture

# 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

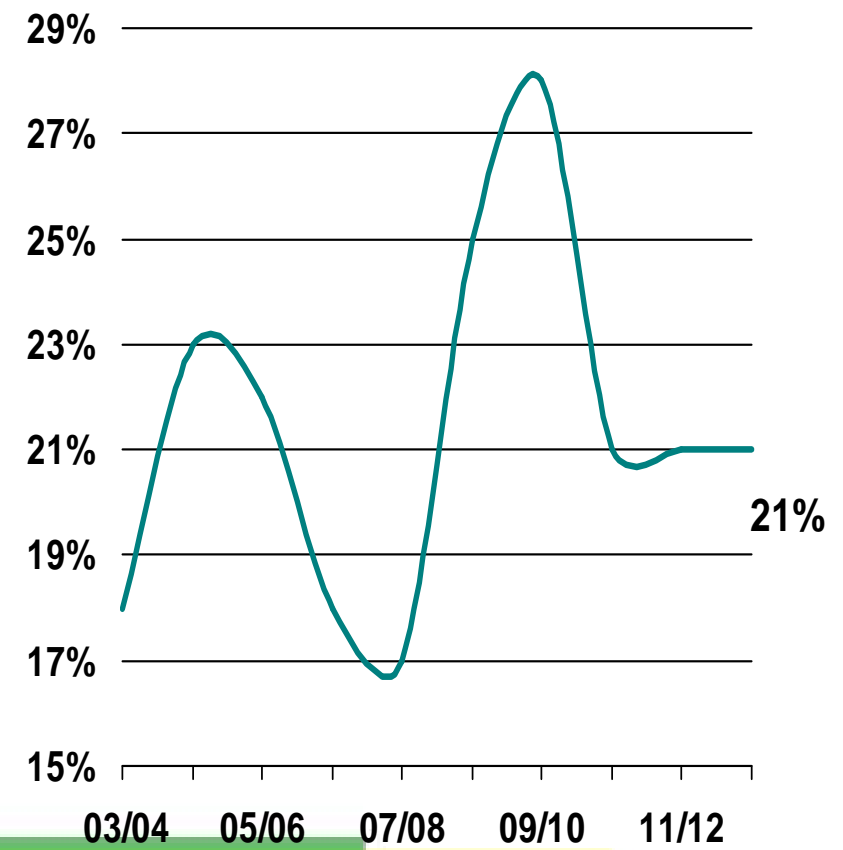
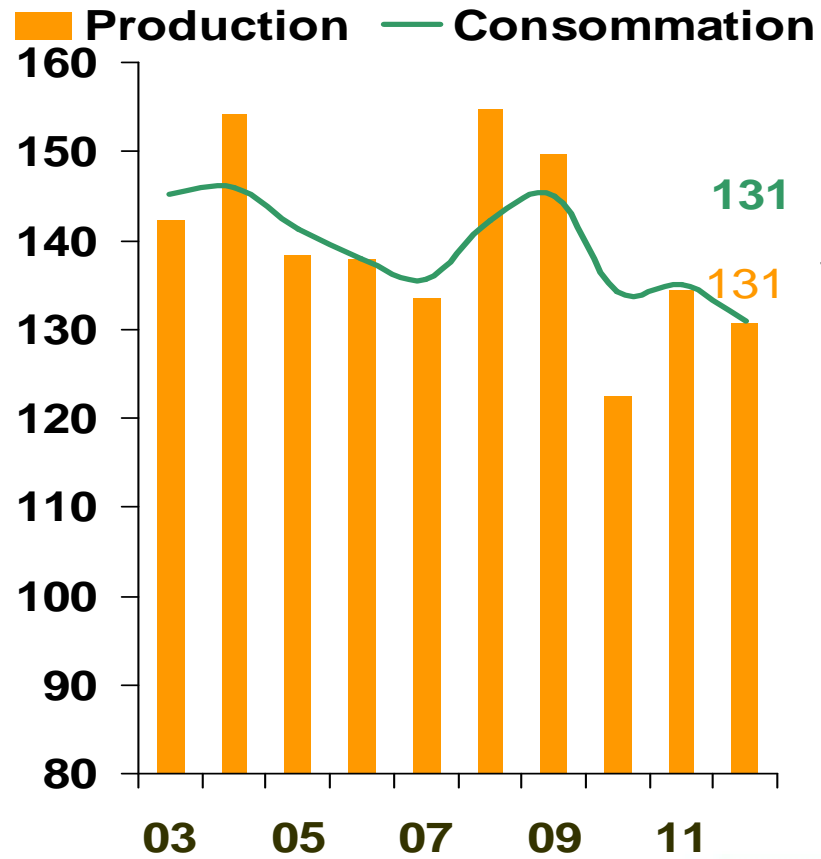
# Cours du maïs



— Argentina Feed Up River    — Black Sea Feed    — Brazil feed Paranaguá  
 — US 3YC Gulf    — Fob Bordeaux

# Bilan mondial orge 2012/13

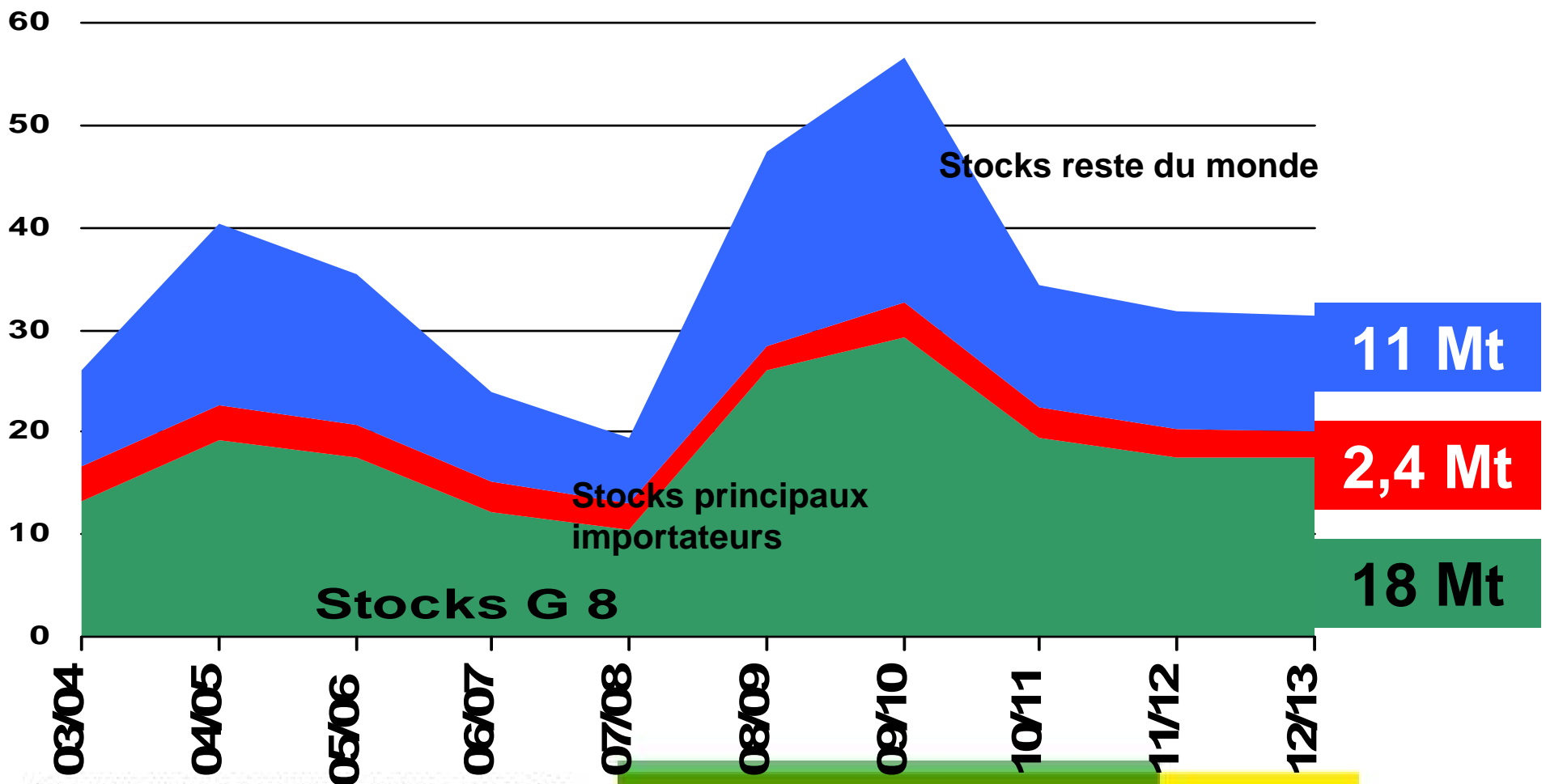
Ratio stock sur consommation



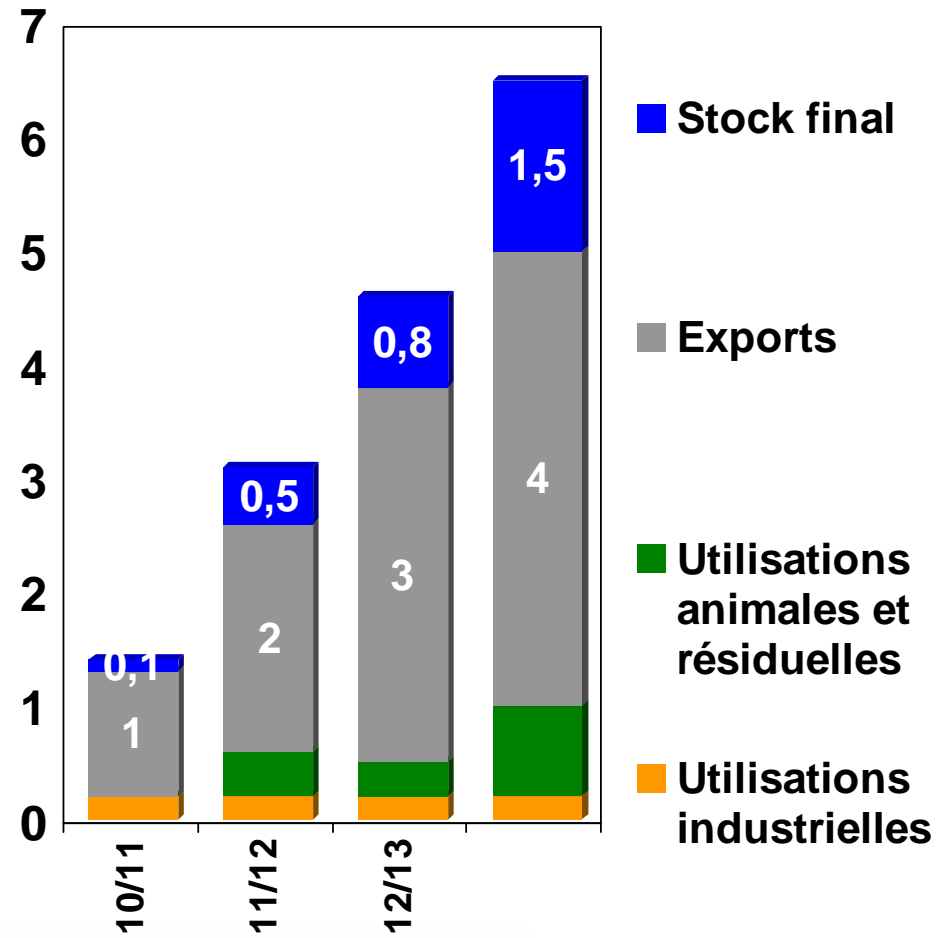
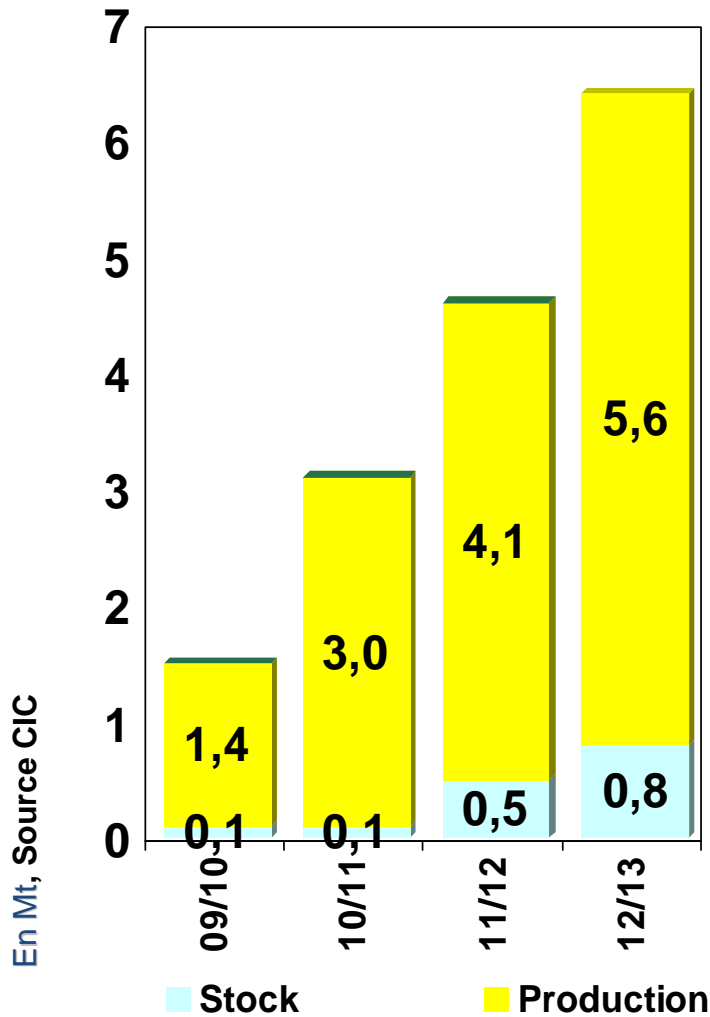


# Répartition des stocks mondiaux d'orge en 2012/13

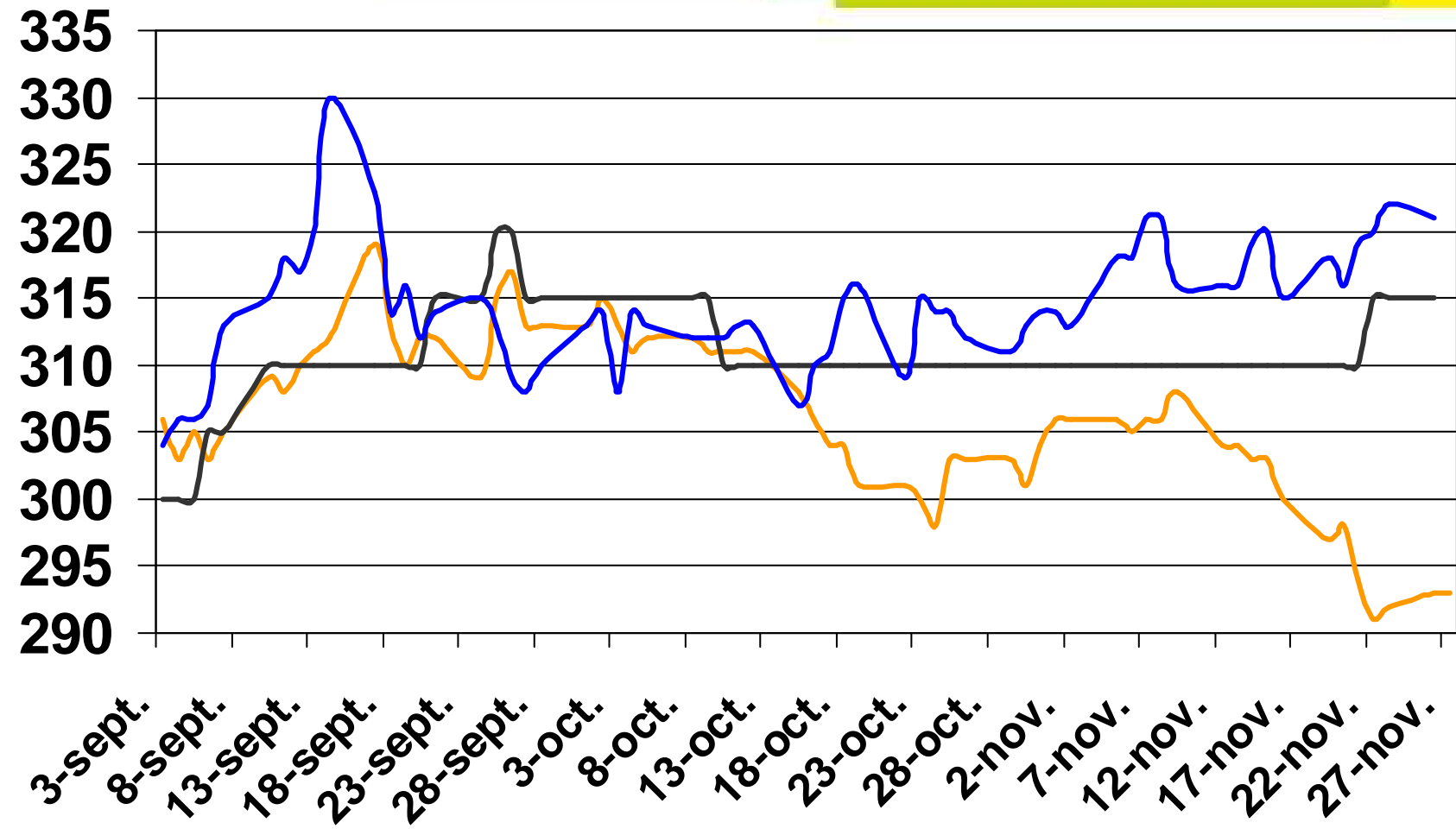
en Mt, Source CIC



# Argentine : bilan orge



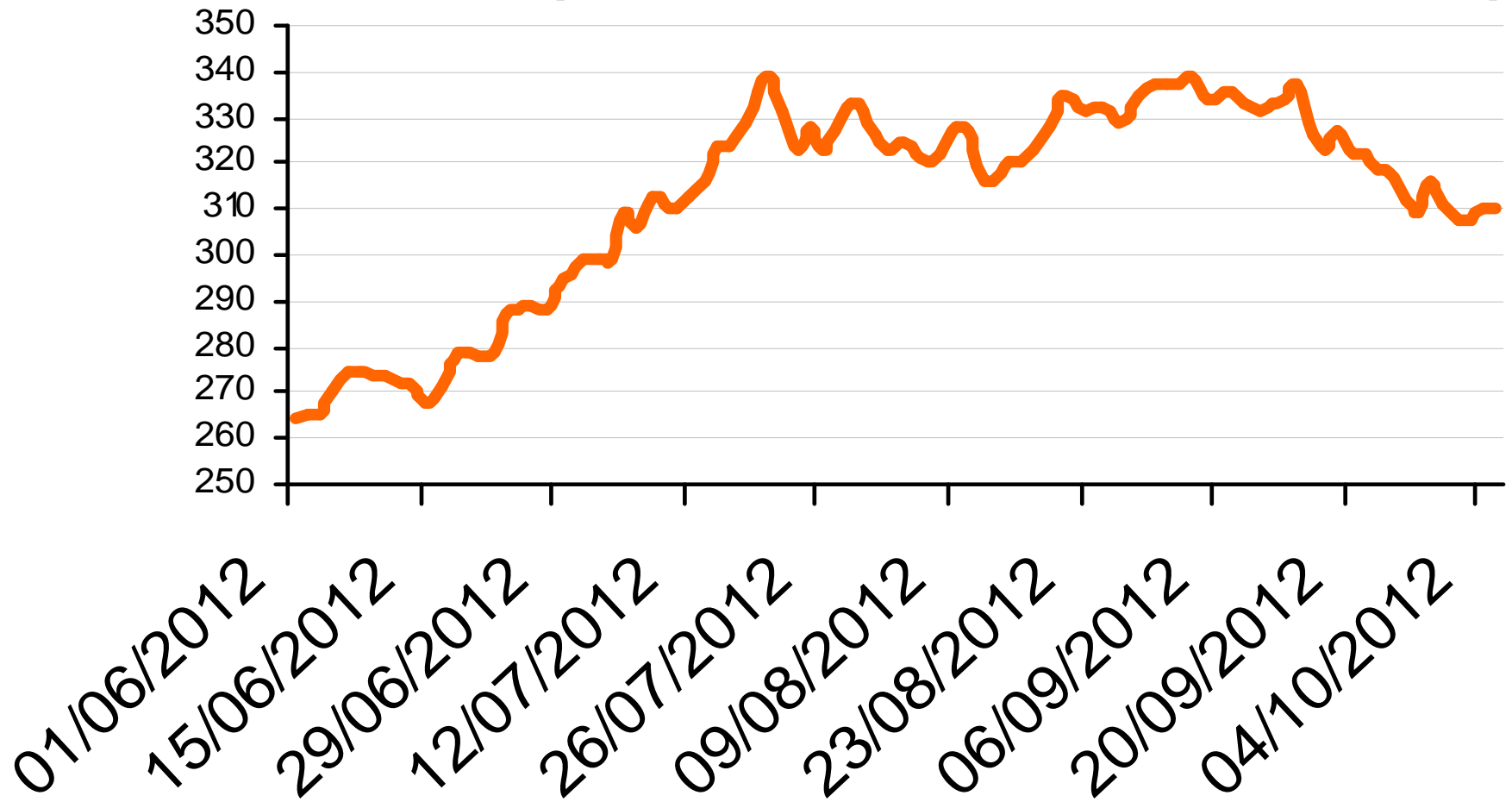
# Cours de l'orge



— Australia Feed Eastern States      — Black Sea Feed      — France Feed Rouen

# Indice CIC - GOI (Grains and Oilseeds Index)

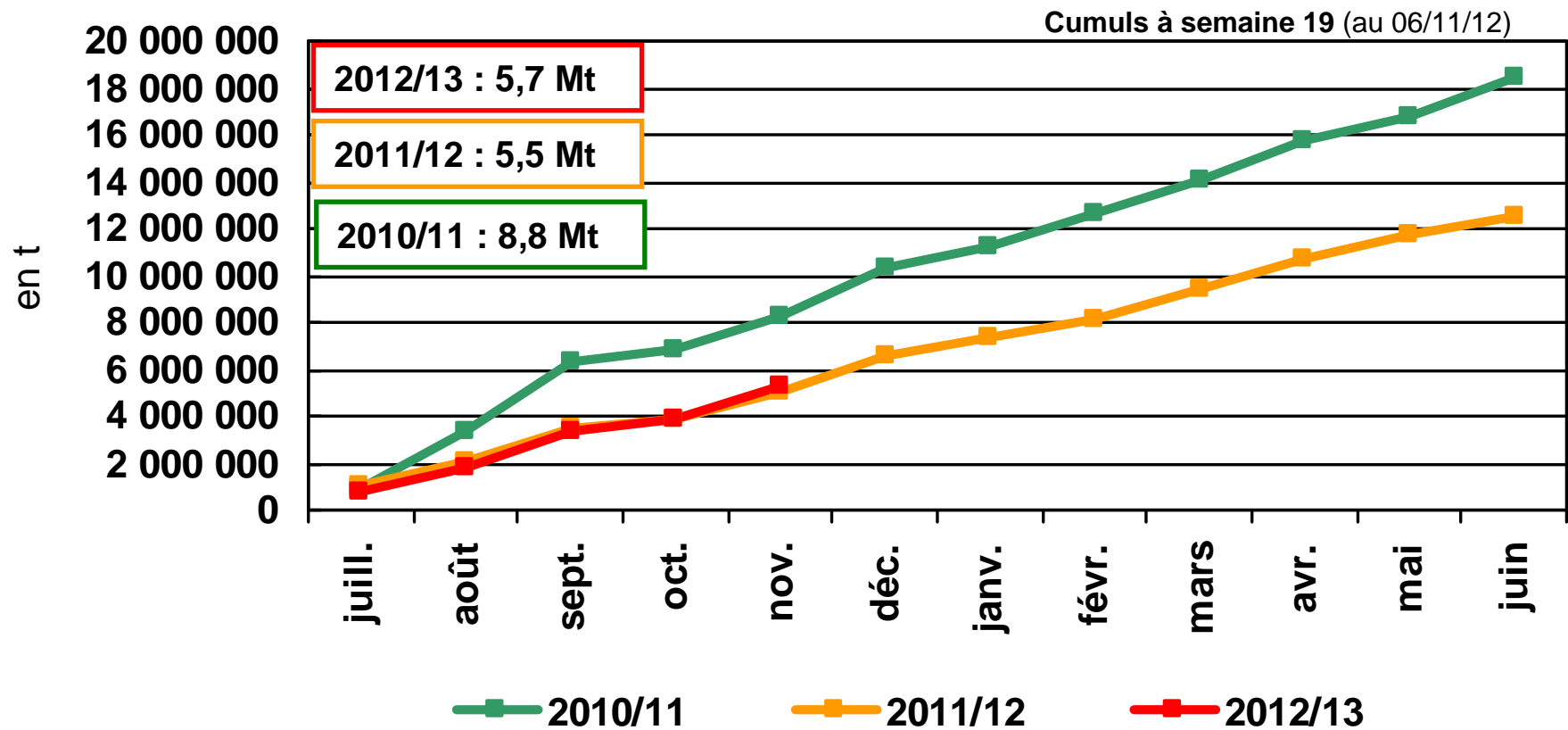
Source : CIC-indice 100 janvier 2000





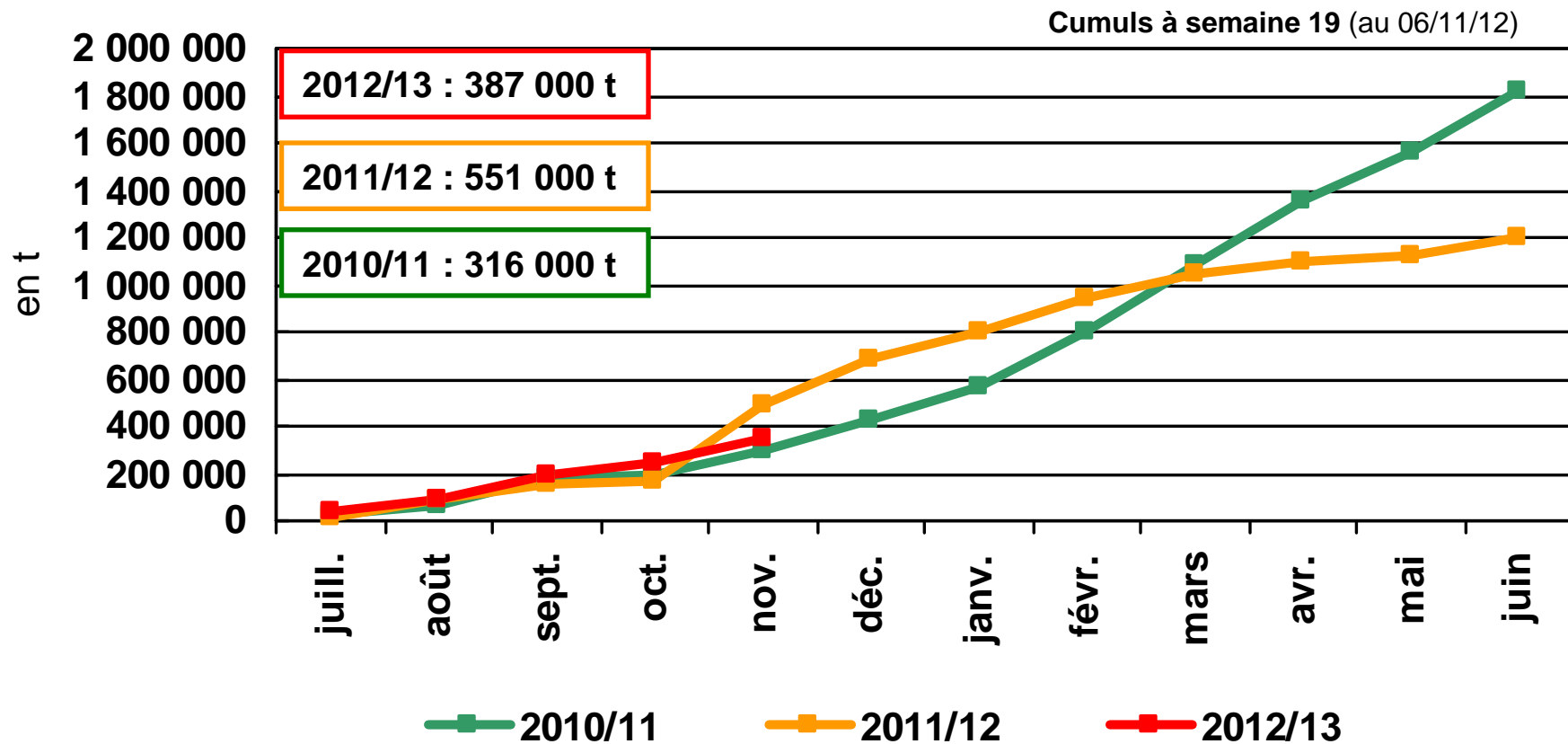
# Marché européen

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



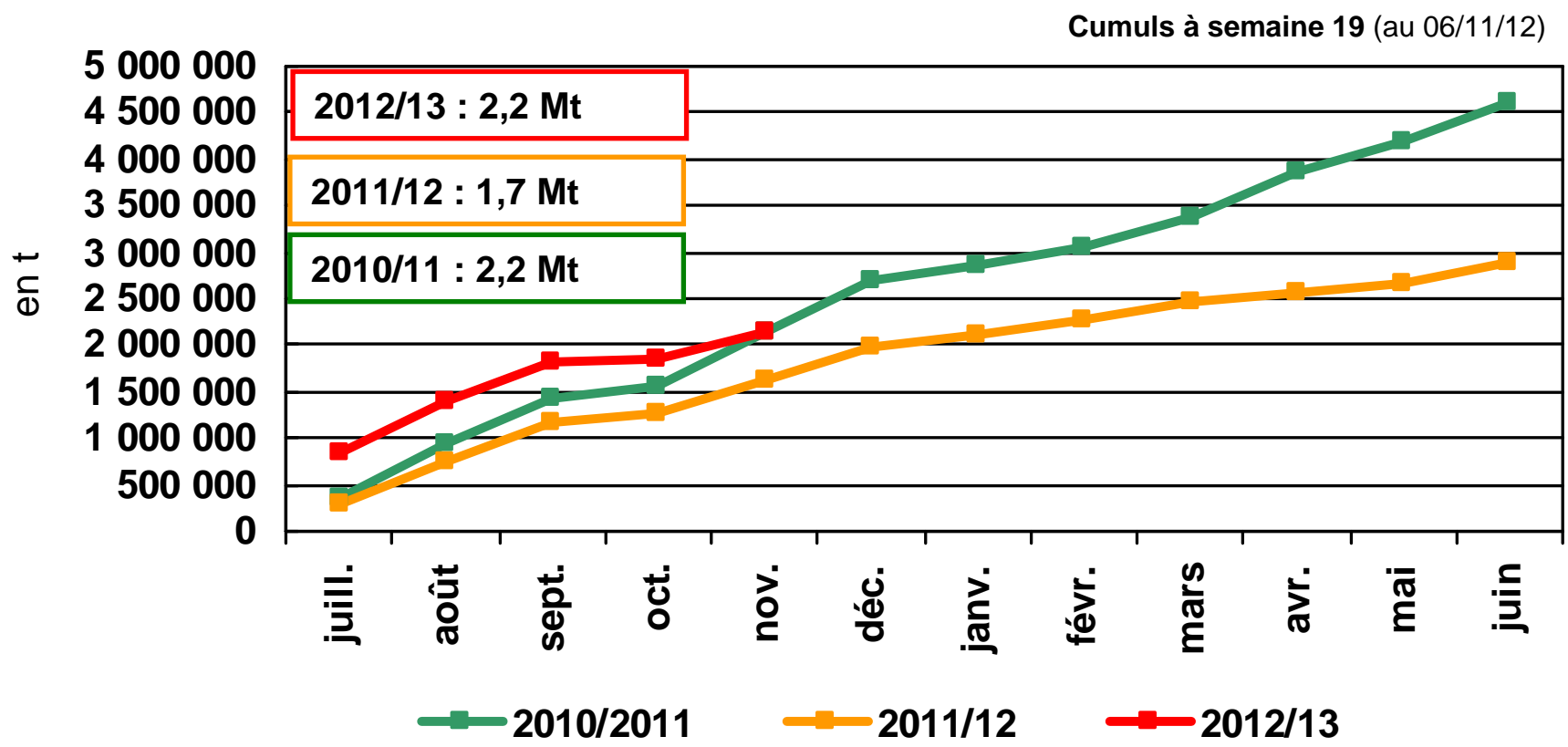
Source : Commission européenne

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



Source : Commission européenne

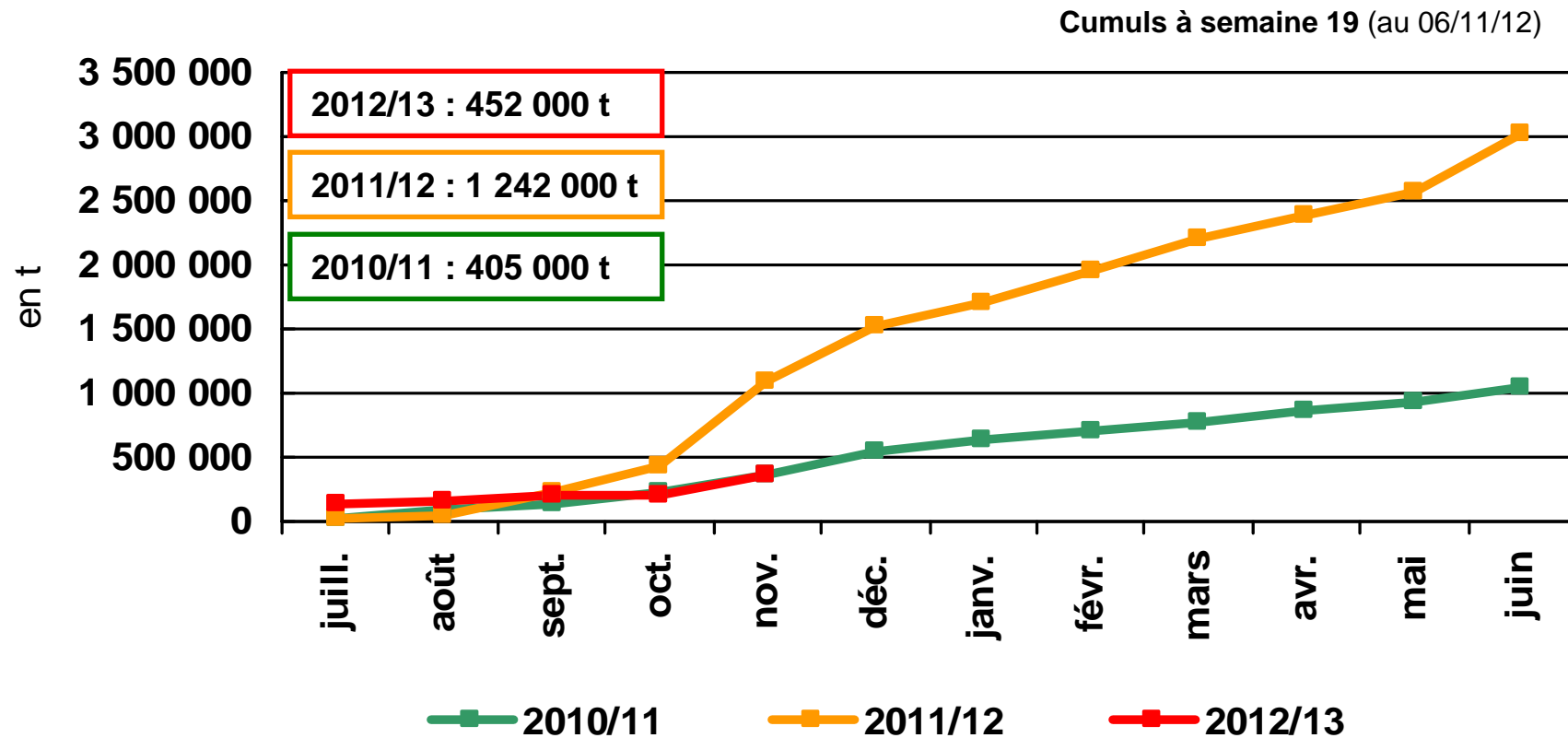
## Orge : certificats à l'exportation délivrés dans l'UE



Source : Commission européenne

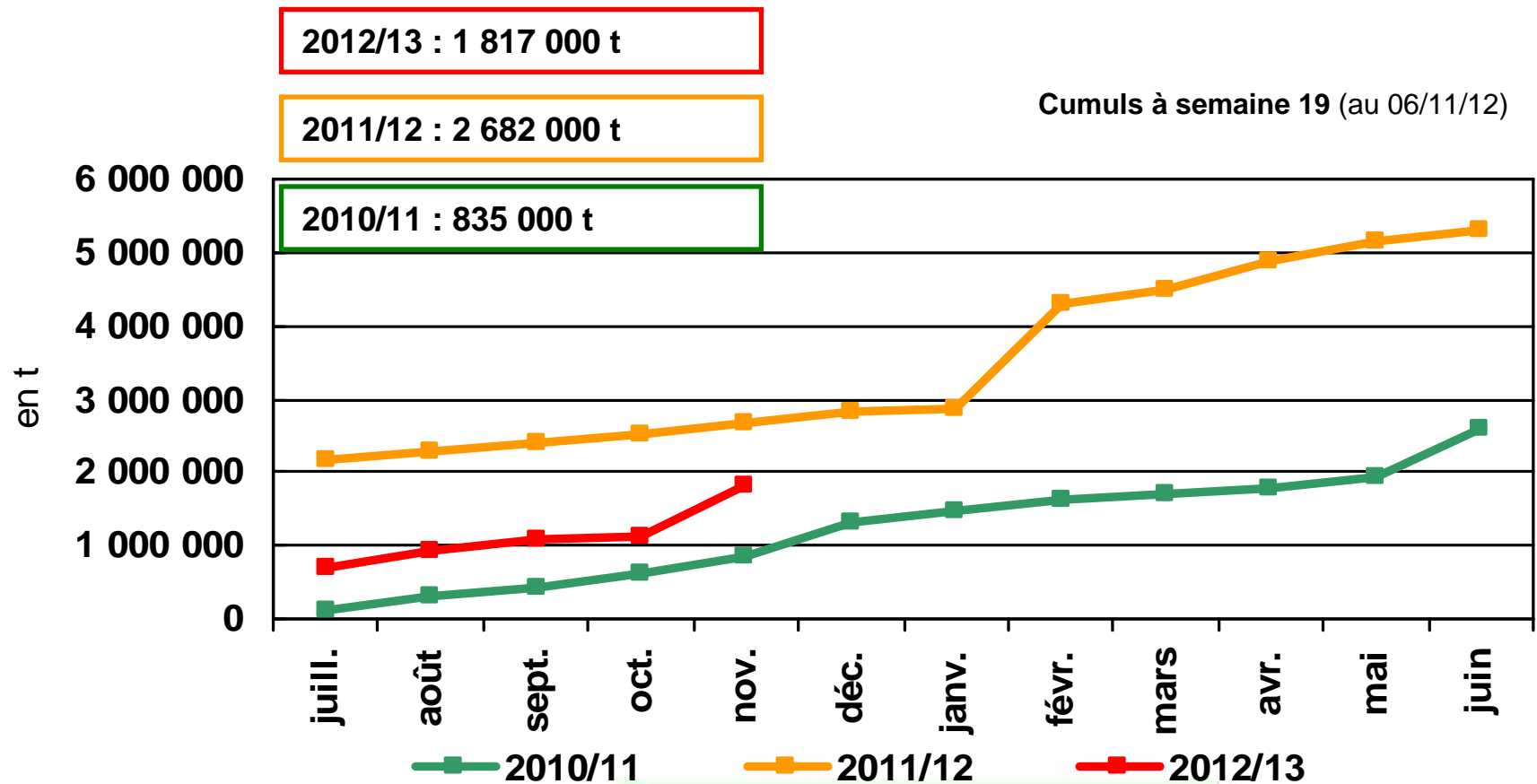


## Maïs : certificats à l'exportation délivrés dans l'UE

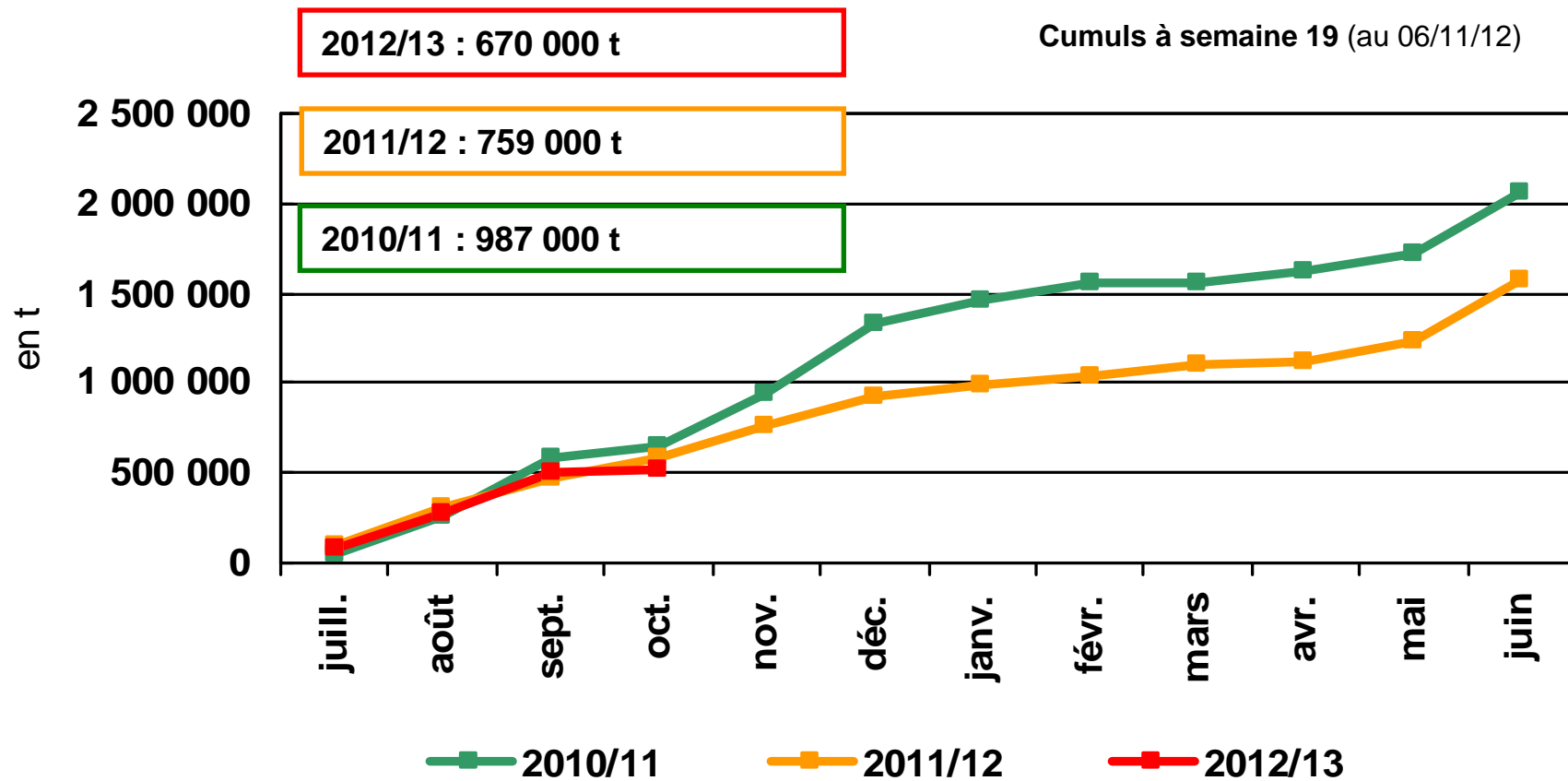


Source : Commission européenne

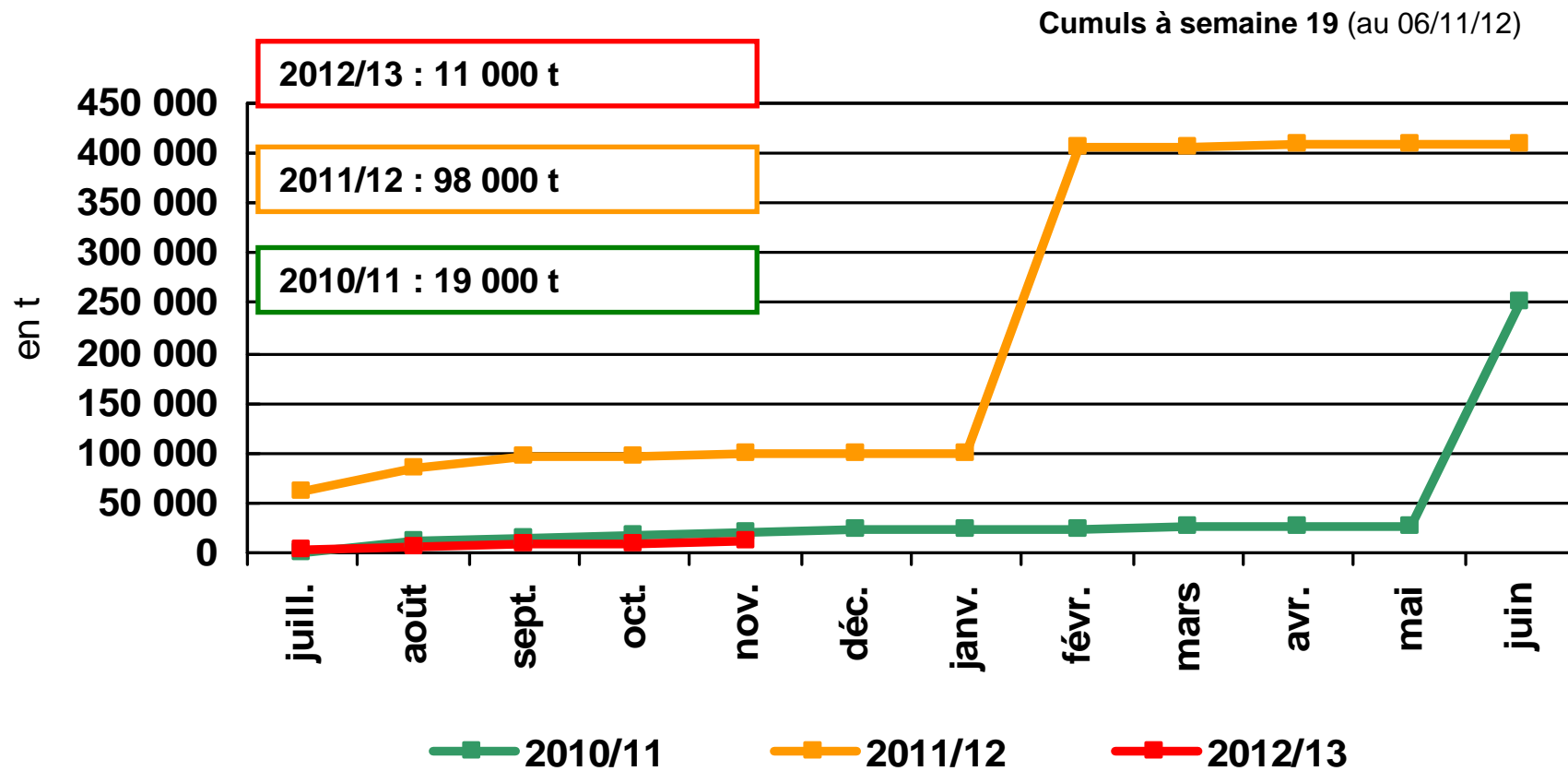
## Blé tendre : certificats à l'importation délivrés dans l'UE



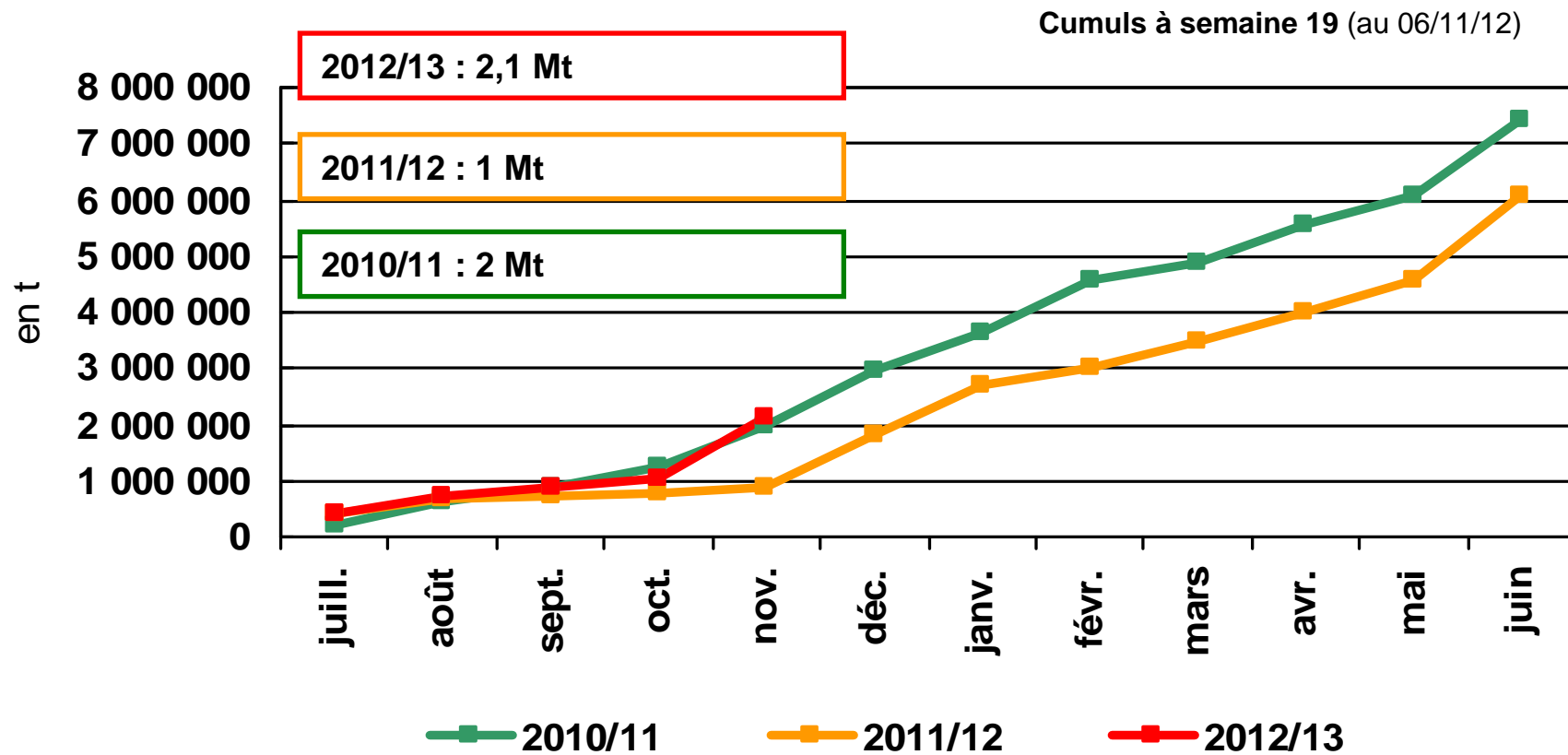
## Blé dur : certificats à l'importation délivrés dans l'UE



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

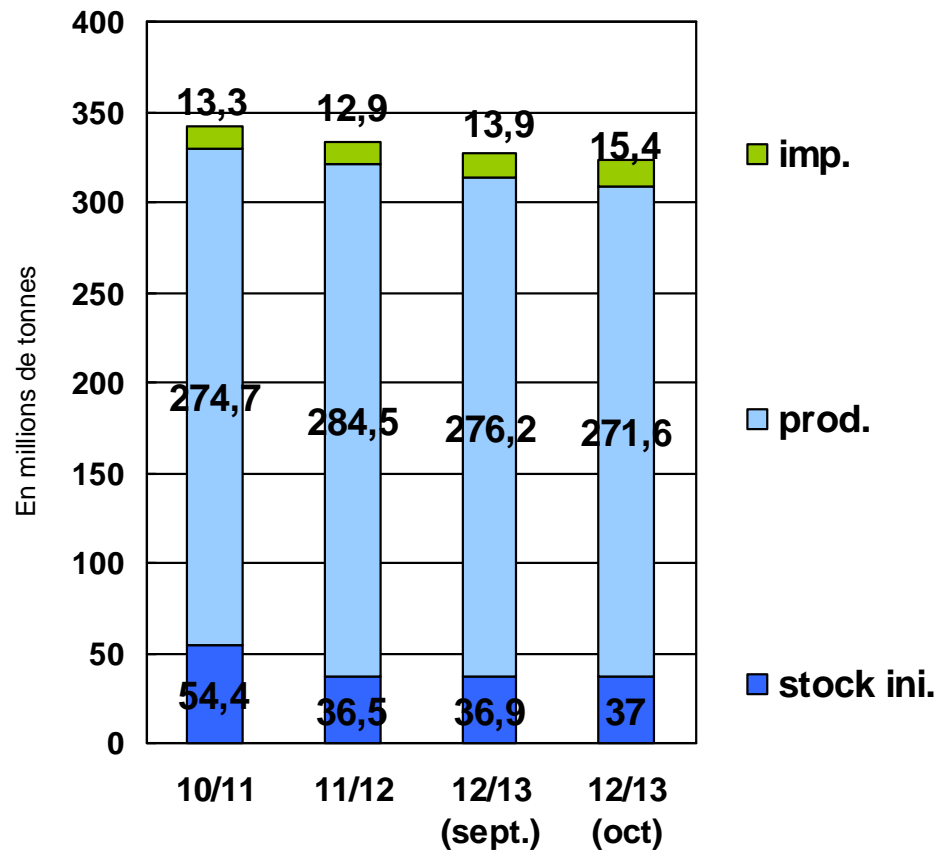


## Maïs : certificats à l'importation délivrés dans l'UE

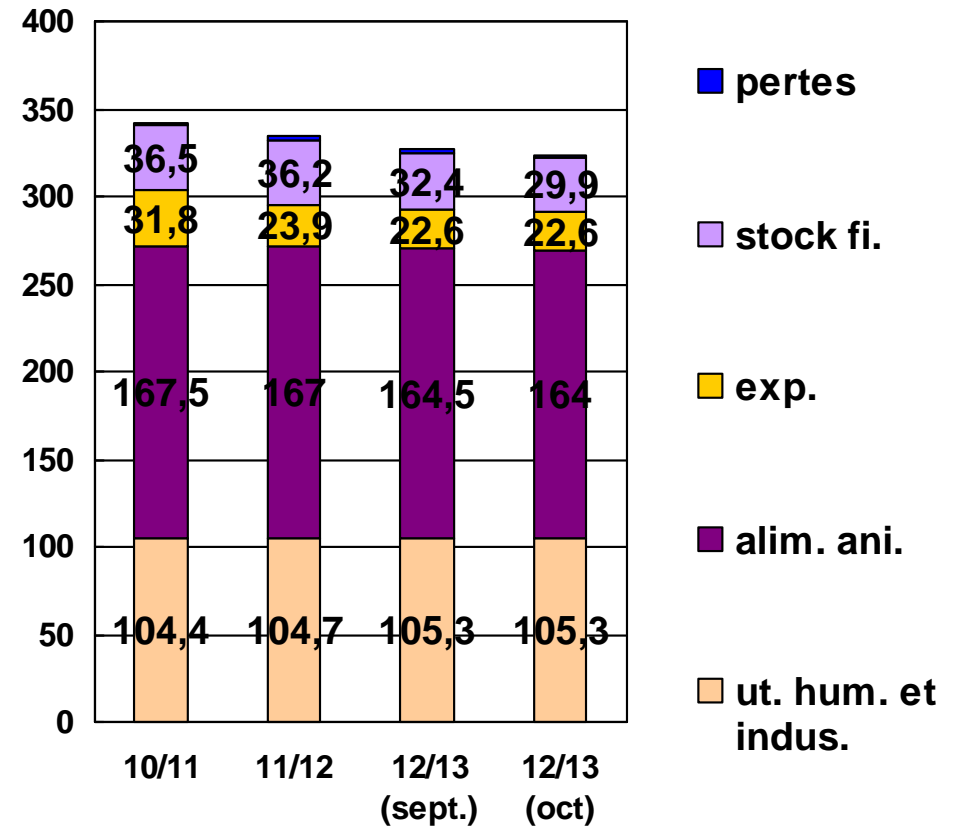


# UE - bilan toutes céréales

Total dispo 2012/13 : 324 Mt

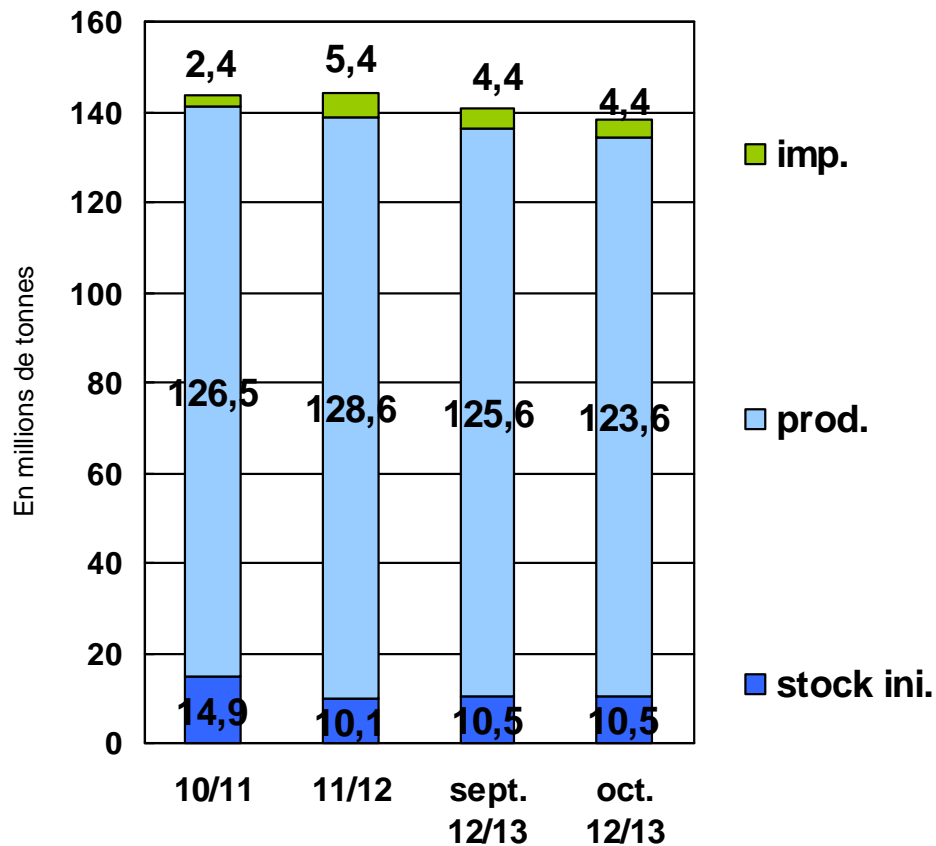


Total utilisation 2012/13 : 324 Mt

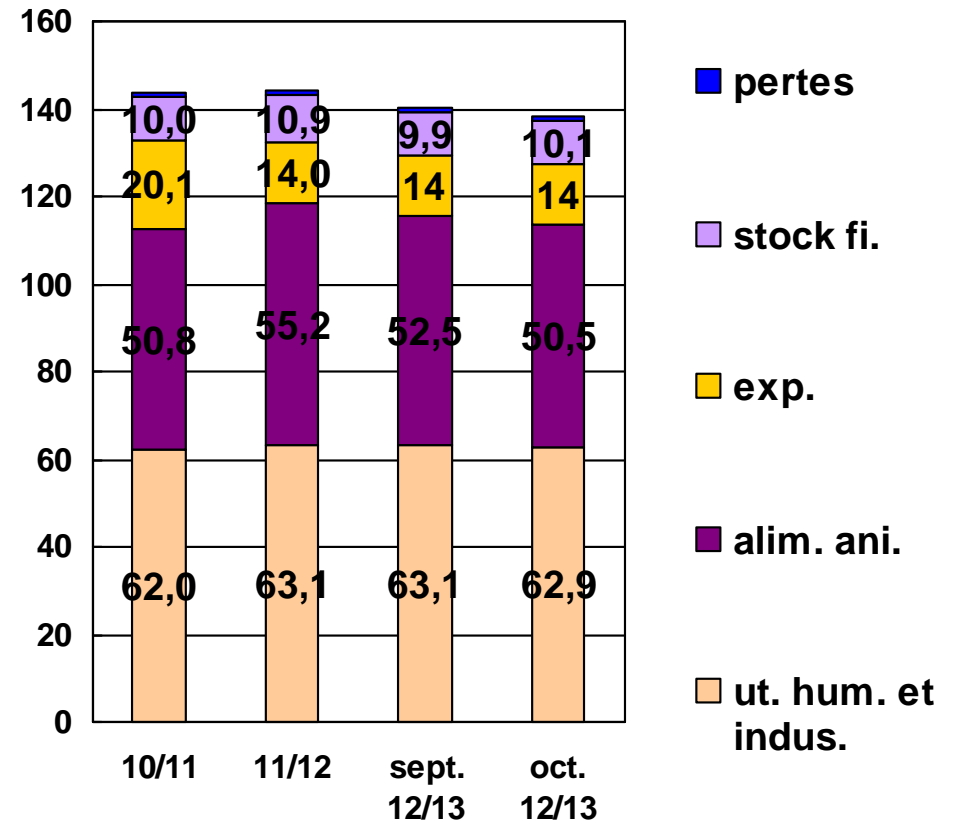


# UE - bilan blé tendre

Total dispo 2012/13 : 138,5 Mt

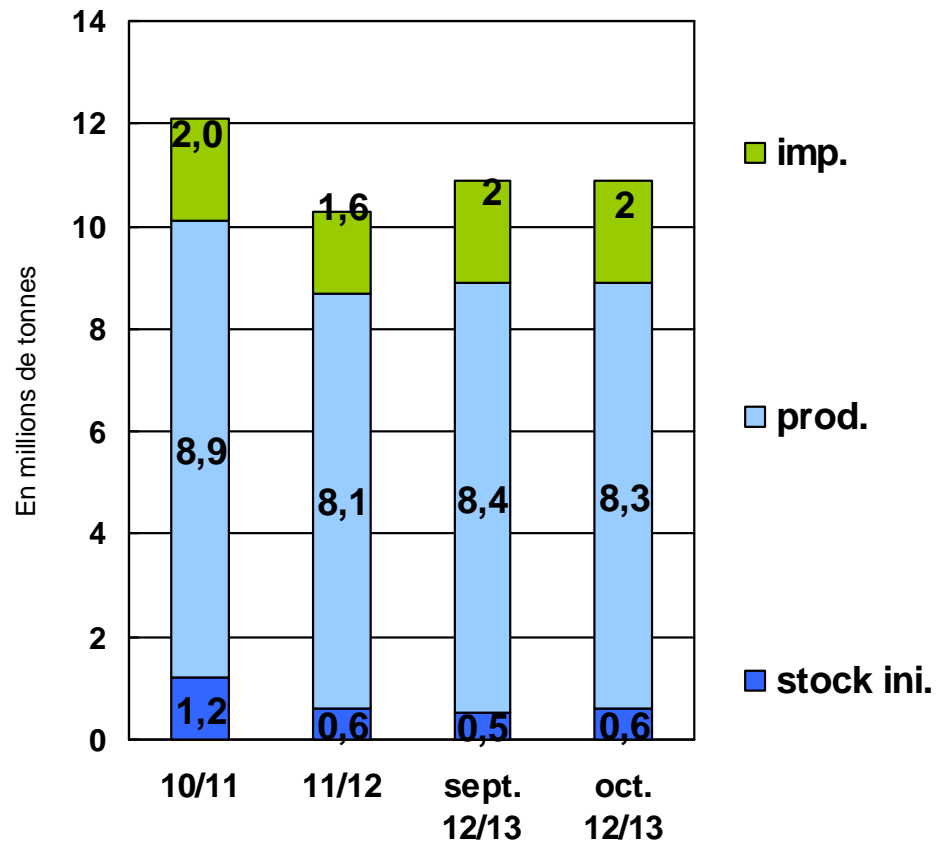


Total utilisation 2012/13 : 138,5 Mt

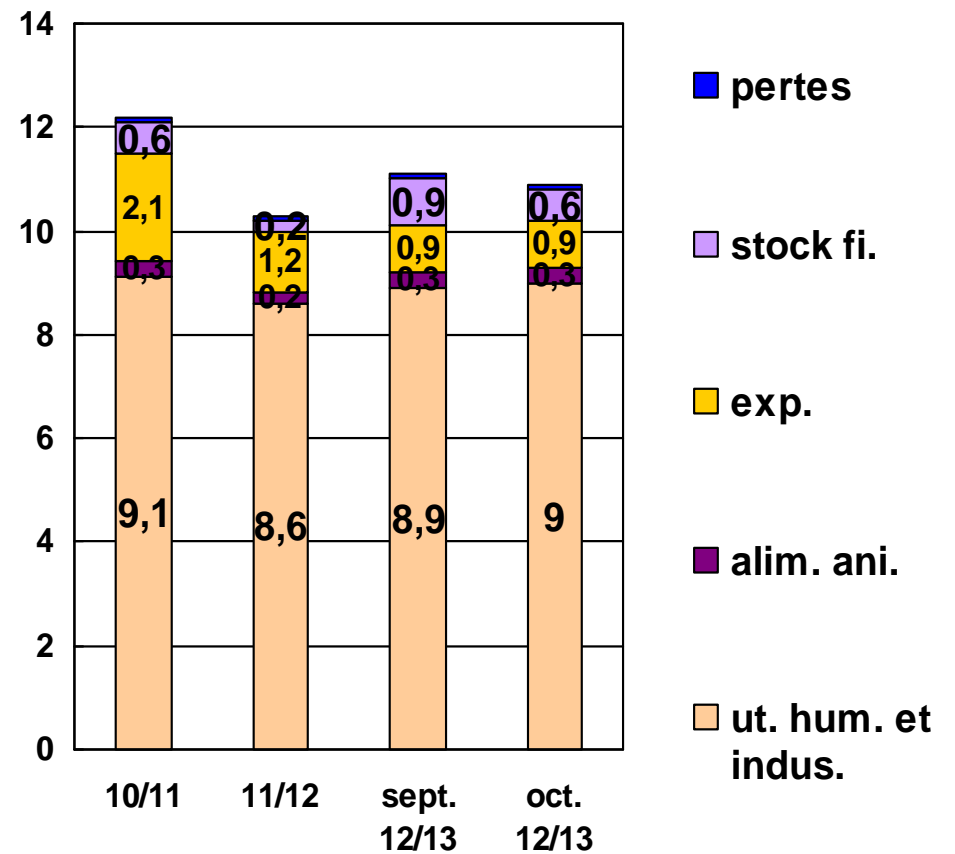


# UE - bilan blé dur

Total dispo 2012/13 : 10,9 Mt



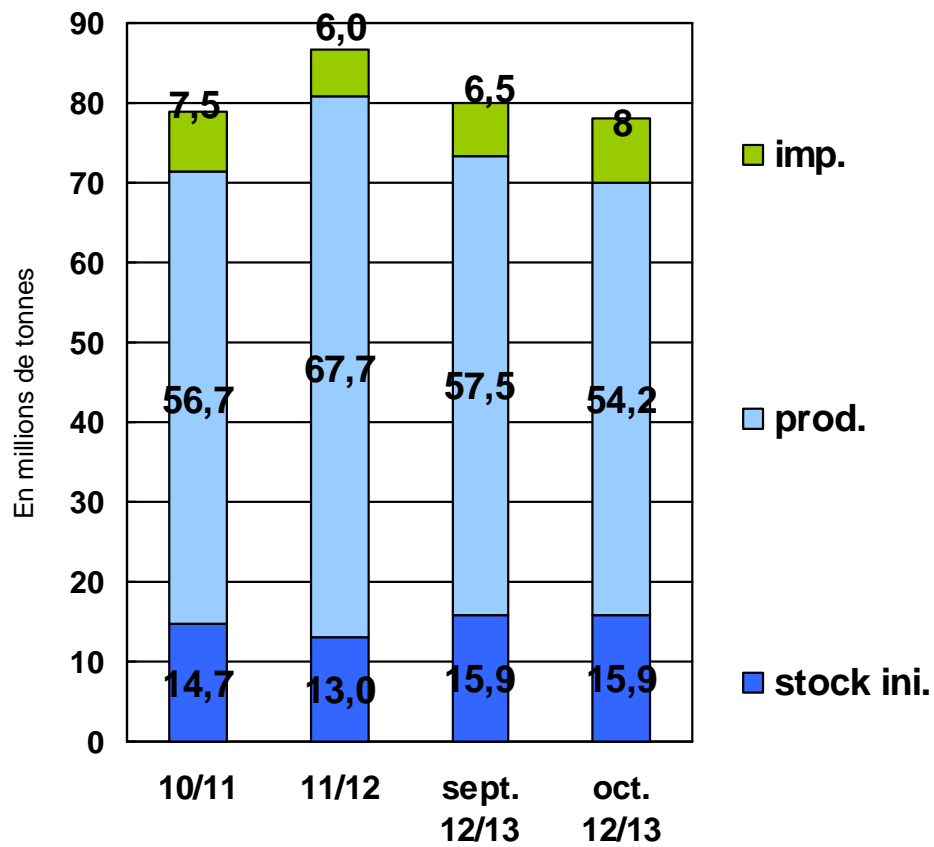
Total utilisation 2012/13 : 10,9 Mt



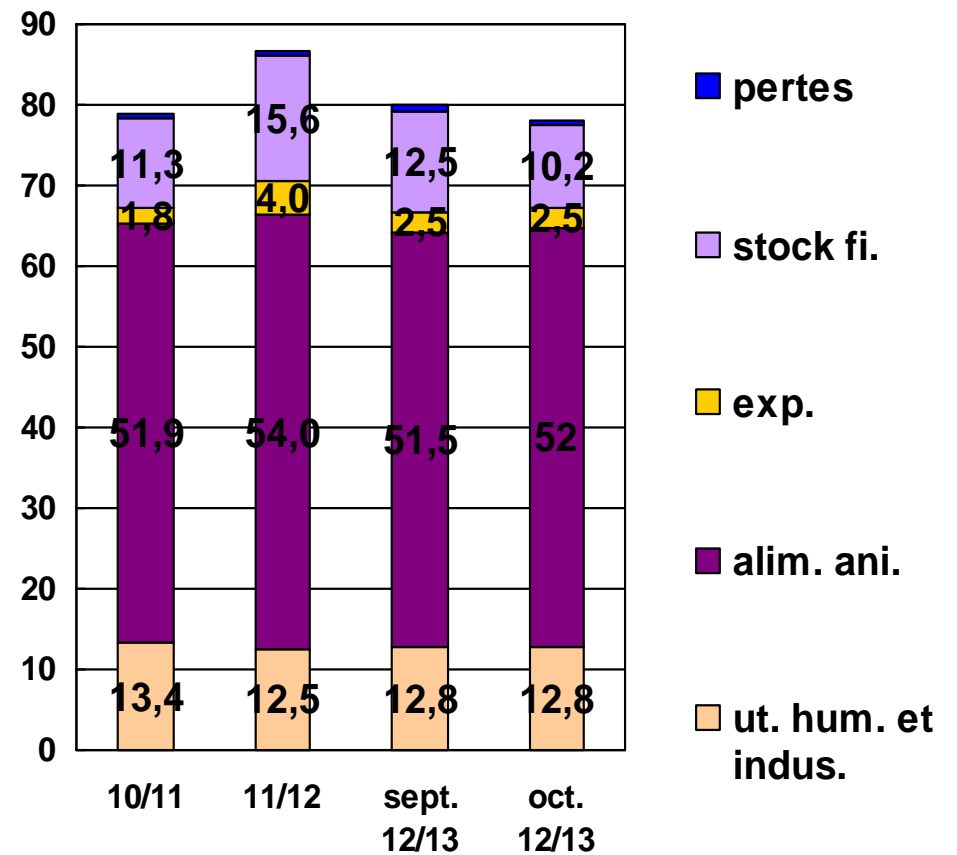


# UE - bilan maïs

Total dispo 2012/13 : 78,1 Mt

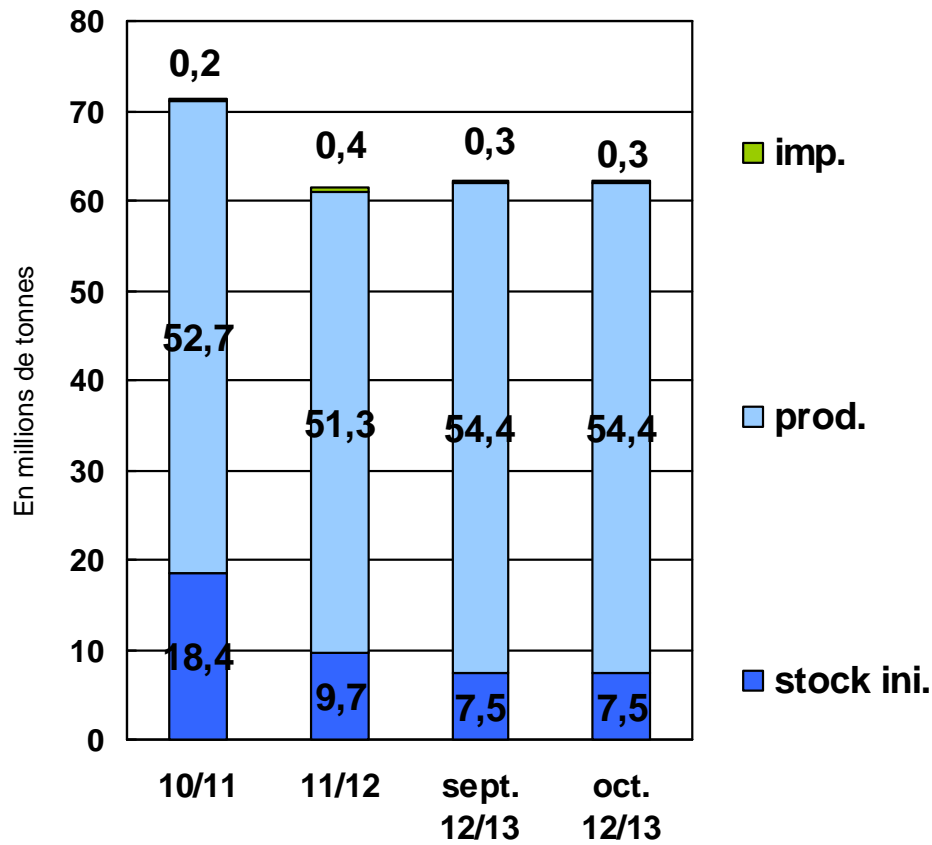


Total utilisation 2012/13 : 78,1 Mt

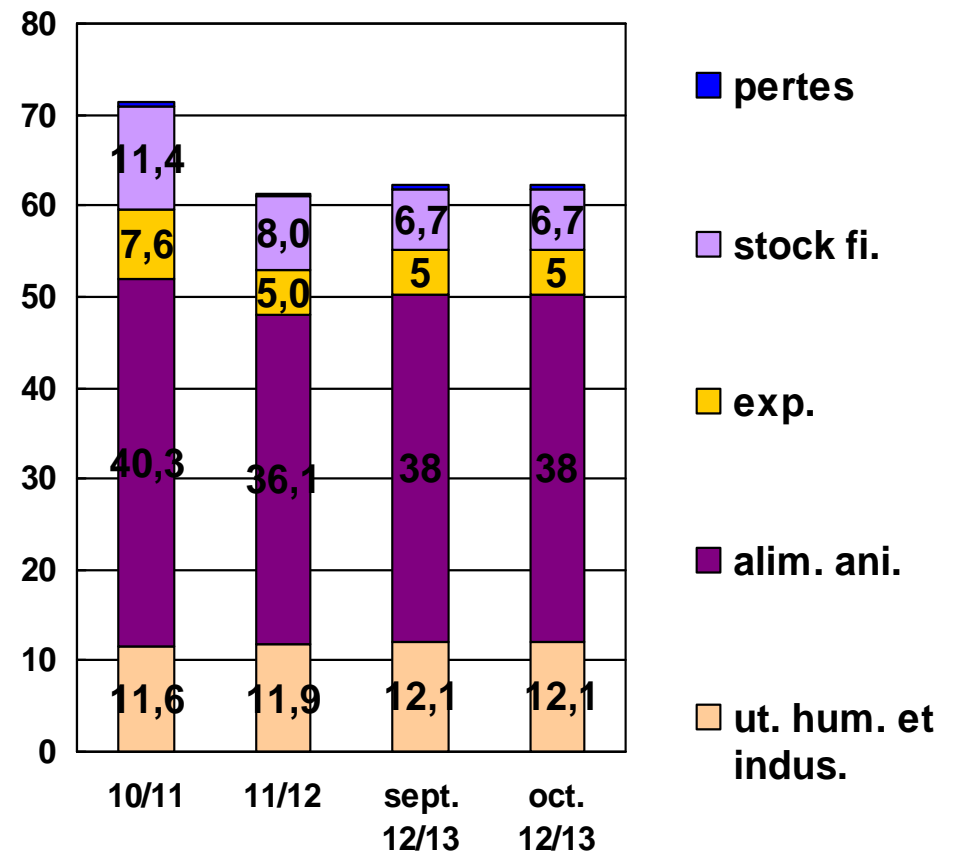


# UE - bilan orge

Total dispo 2012/13 : 62,1 Mt

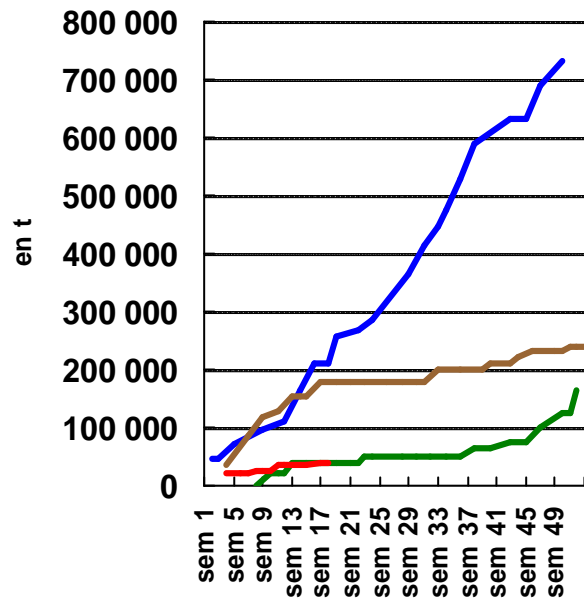


Total utilisation 2012/13 : 62,1 Mt

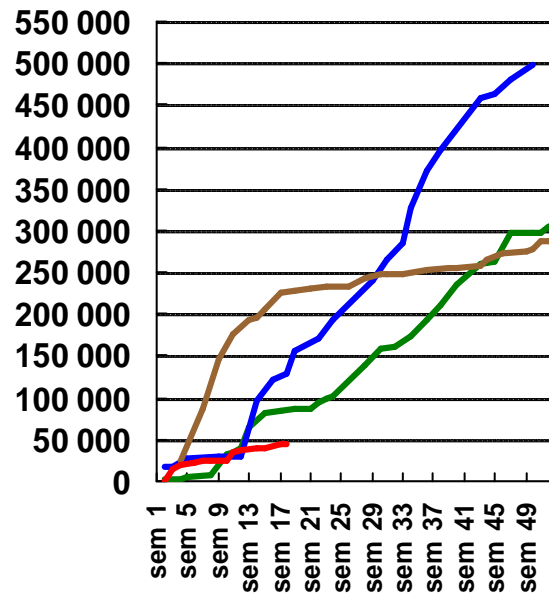


## IMPORTATIONS DE "PRODUITS DE SUBSTITUTION DES CEREALES" (PSC) Certificats délivrés, en cumul depuis le début de campagne

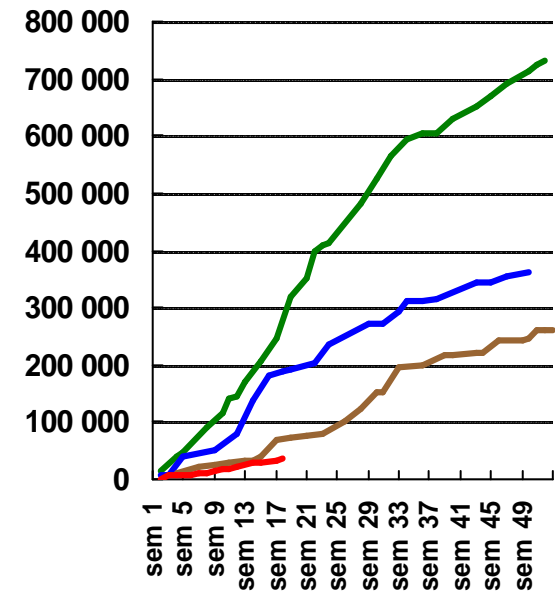
Corn gluten feed



Drèches de brasserie

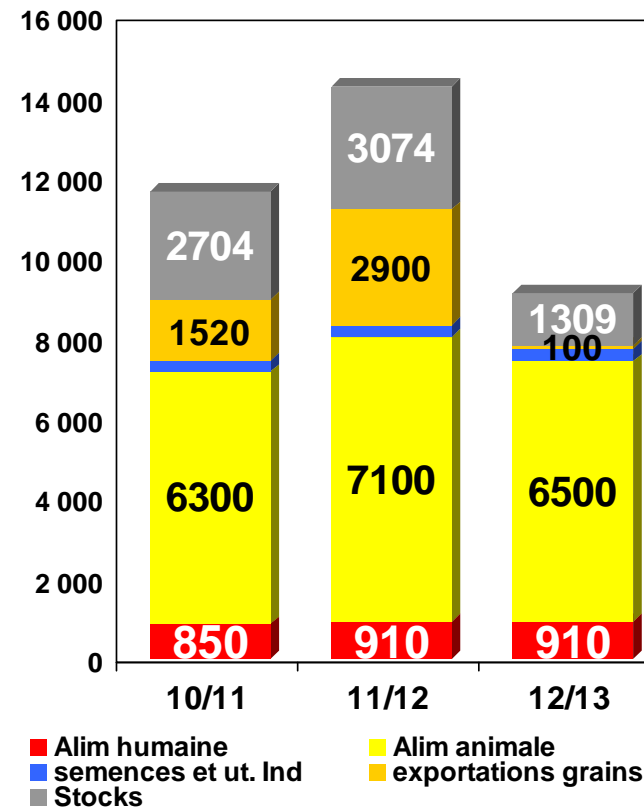
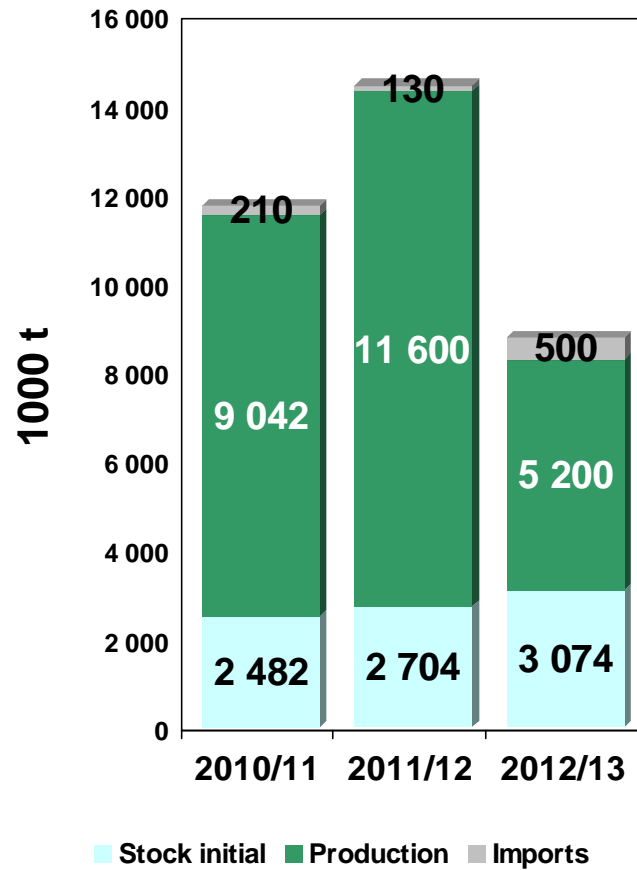


Pulpes d'agrumes

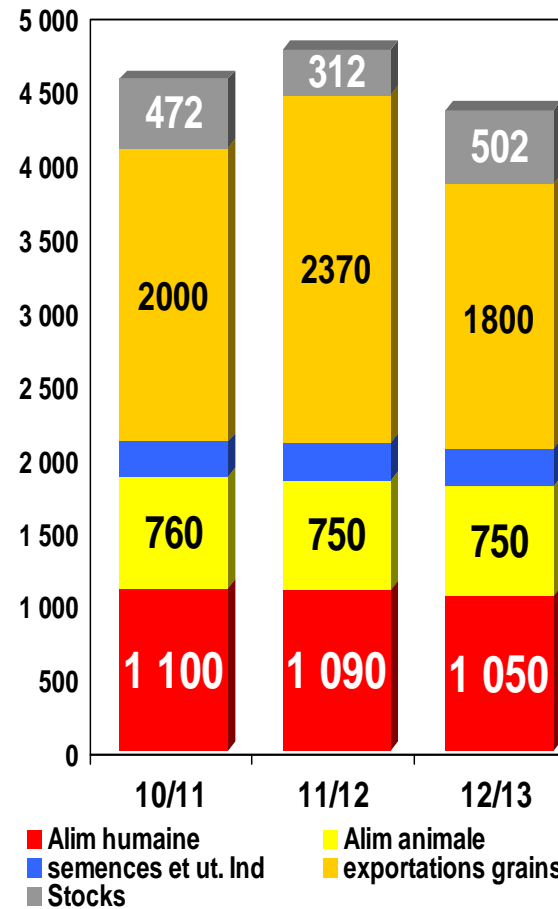
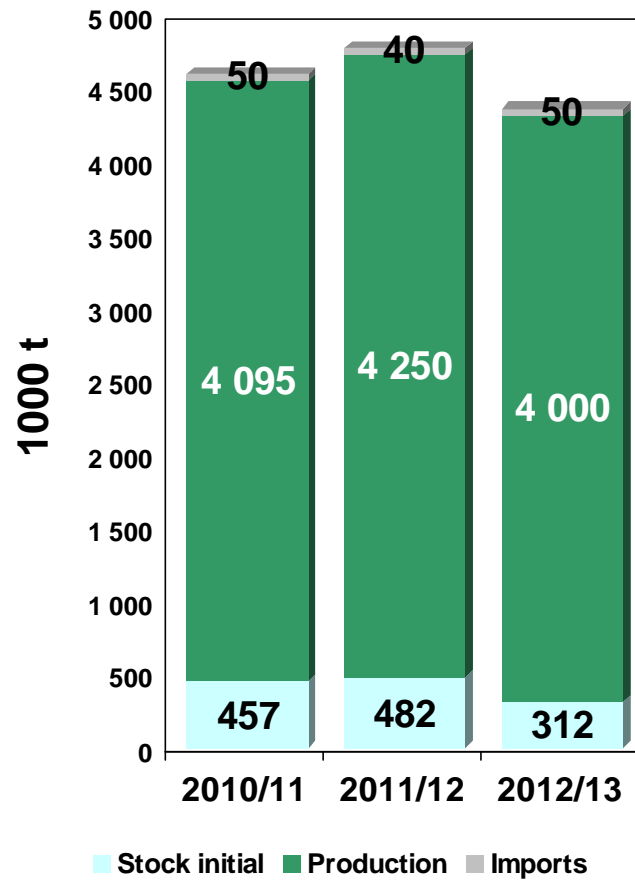


— 2009/10      — 2010/11  
— 2011/12      — 2012/13

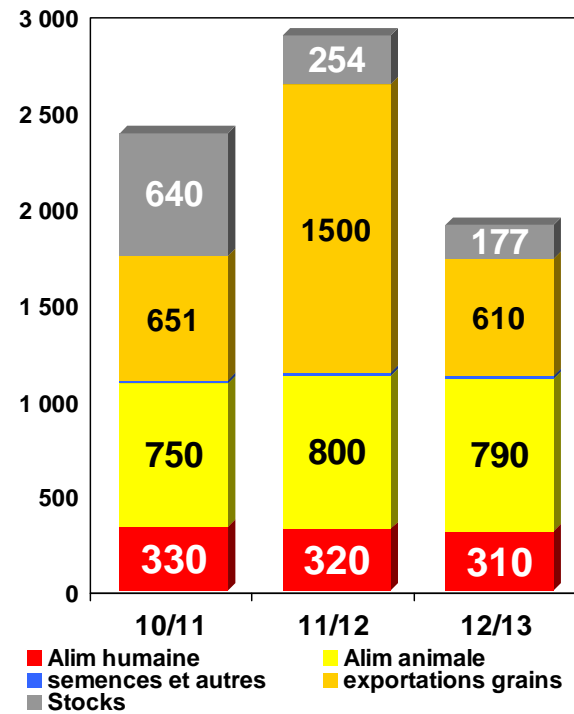
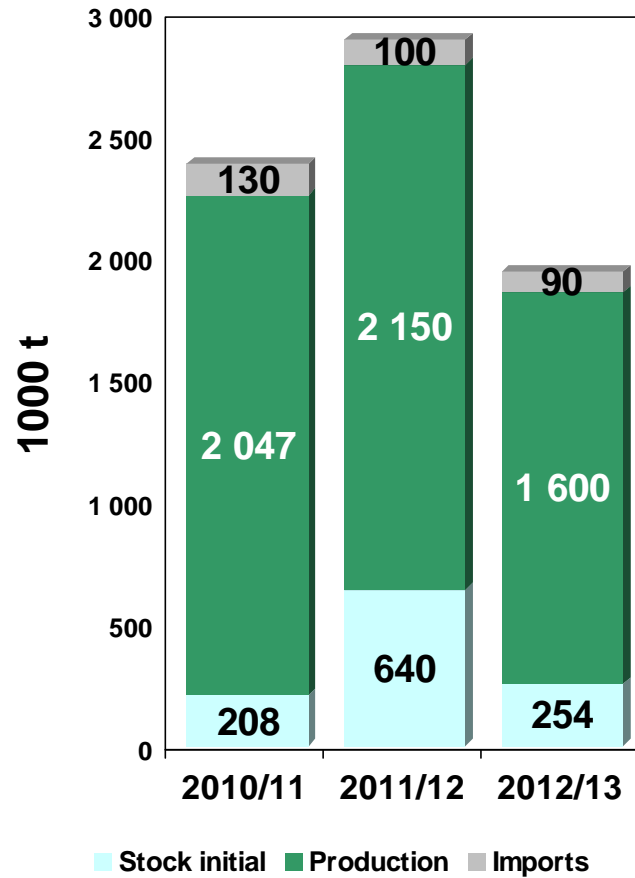
## ROUMANIE : Bilan maïs



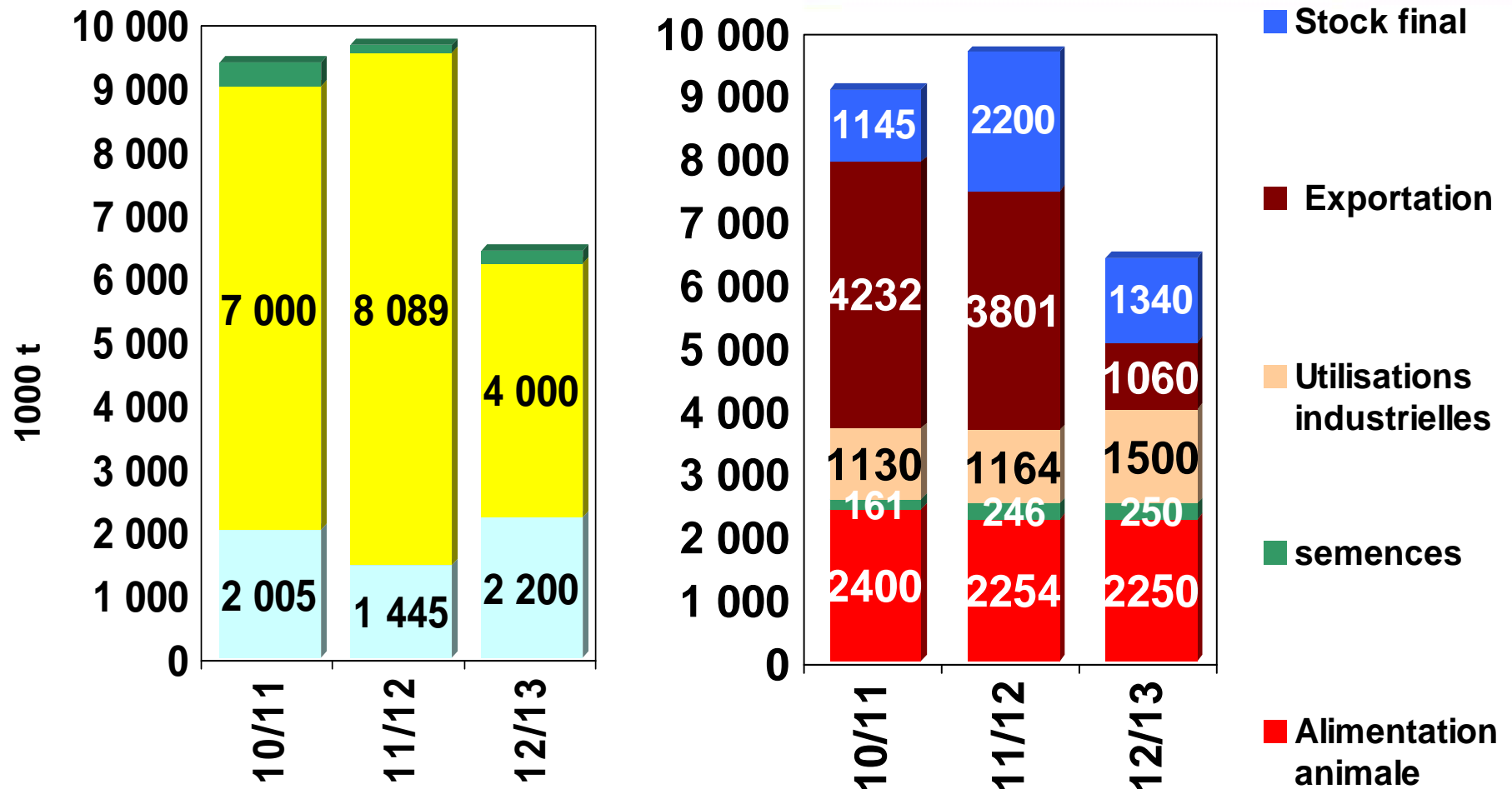
## BULGARIE : bilan blé tendre



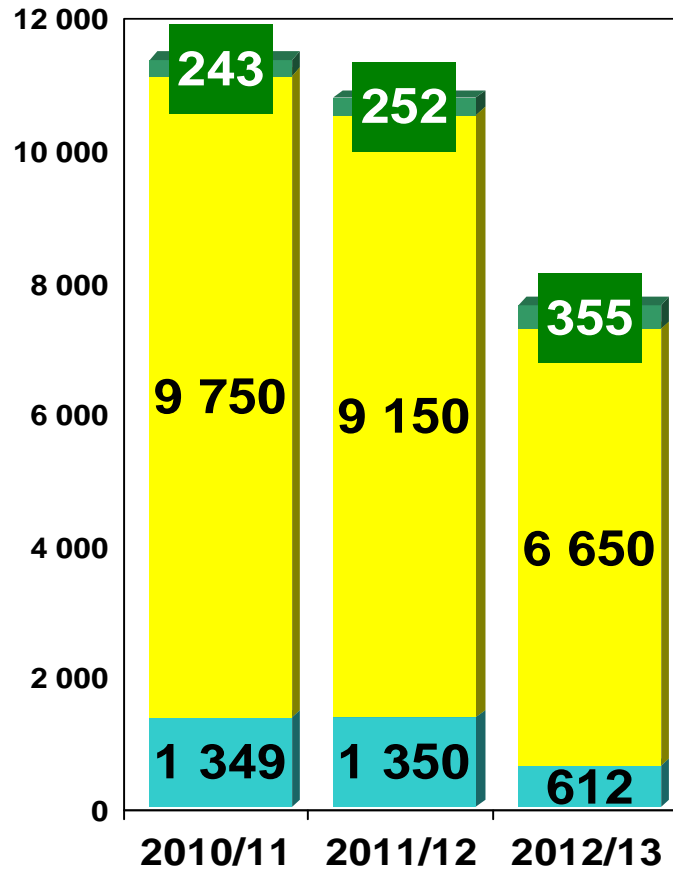
# BULGARIE : bilan maïs



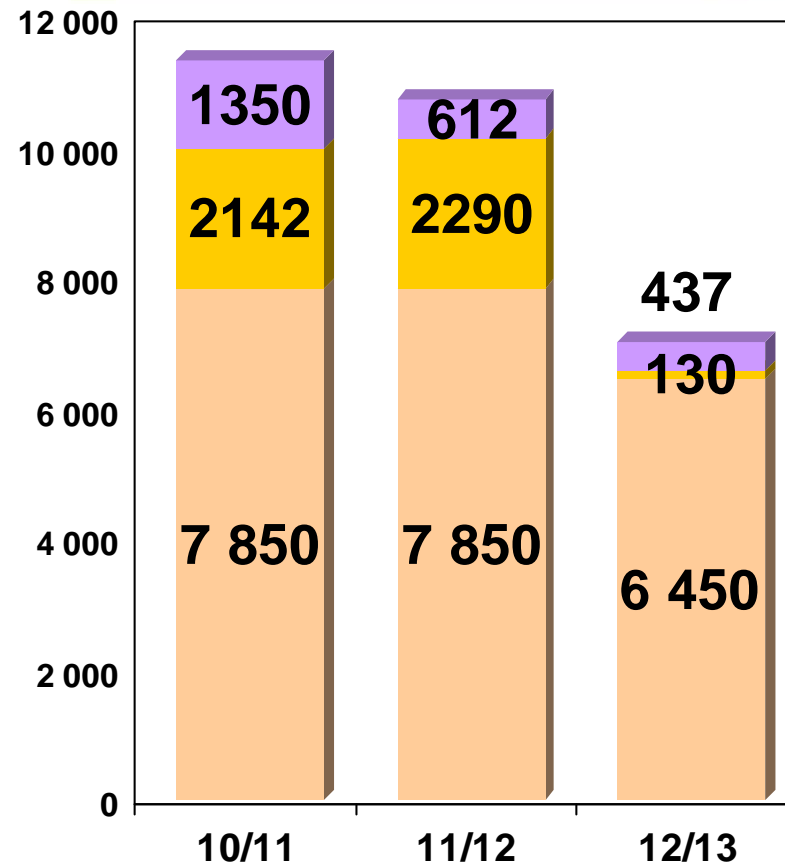
## Hongrie, bilan maïs



# Bilan Maïs Balkans occidentaux



■ Stock initial ■ Production ■ Imports

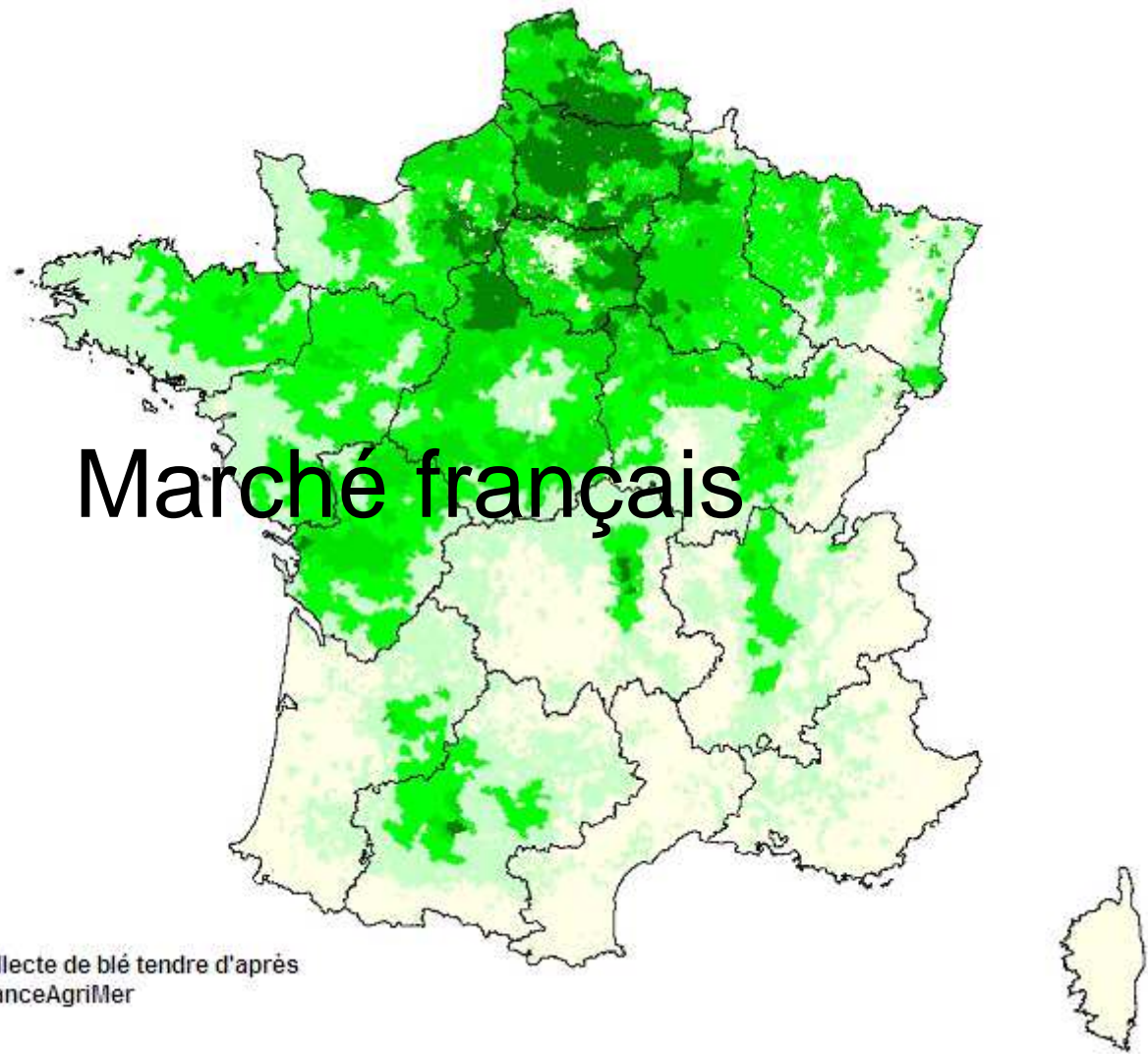
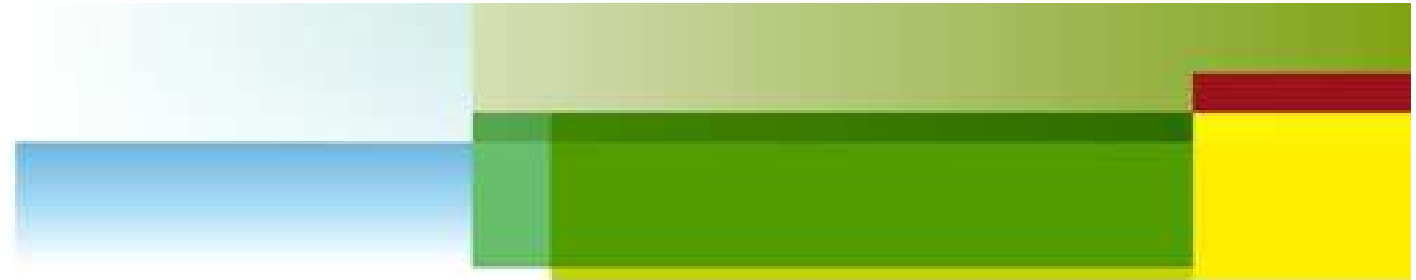


■ Conso intérieure ■ exportations grains ■ Stocks



# Production de maïs de l'Europe danubienne

Roumanie	9 042	11 600	5 200	-55%
Bulgarie	2 047	2 150	1 600	-26%
Hongrie	7 000	8 089	4 000	-51%
Balkans occidentaux	9 750	9 150	6 650	-27%
Total	27 839	30 989	17 450	-44%

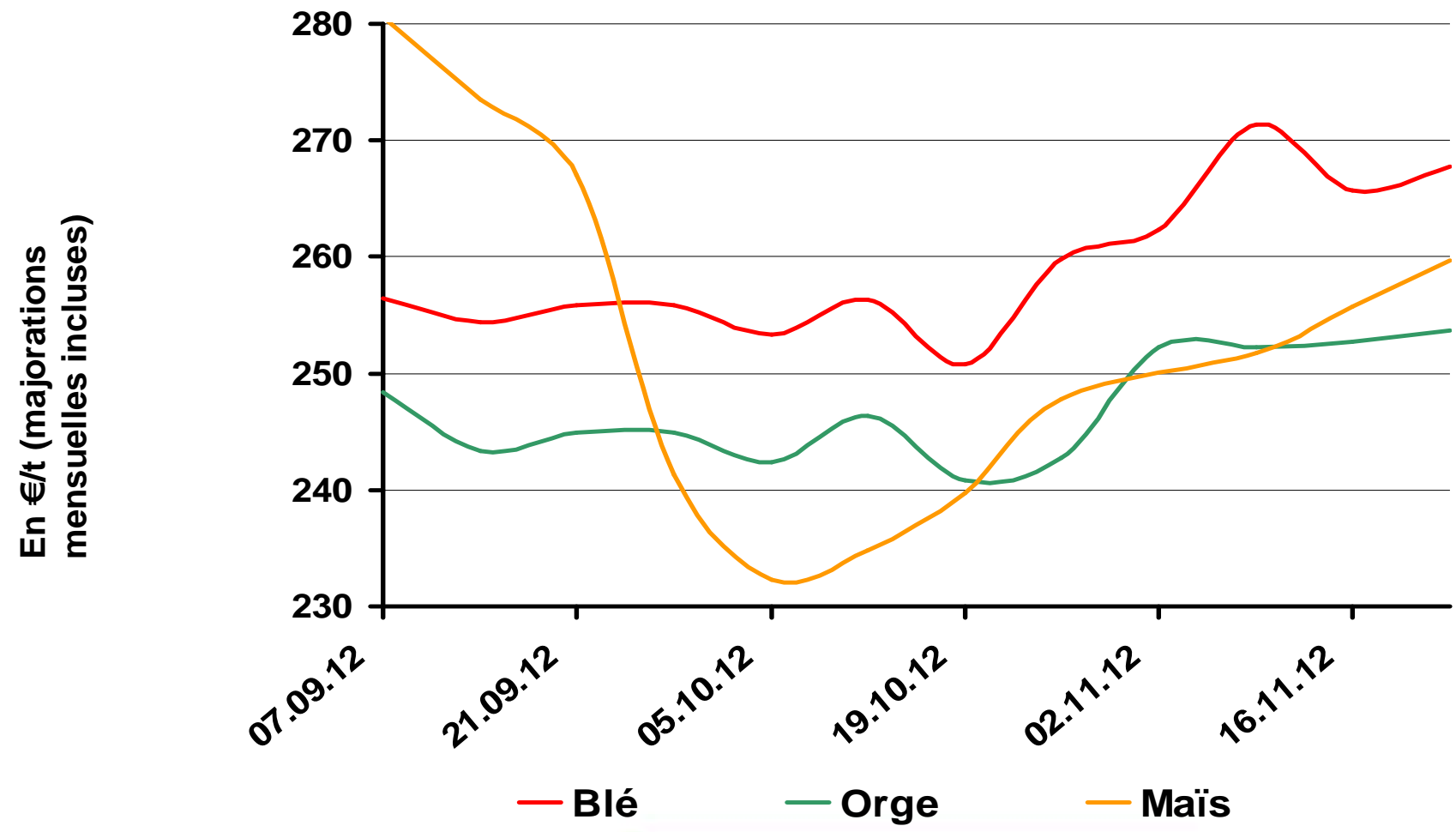


# Marché français

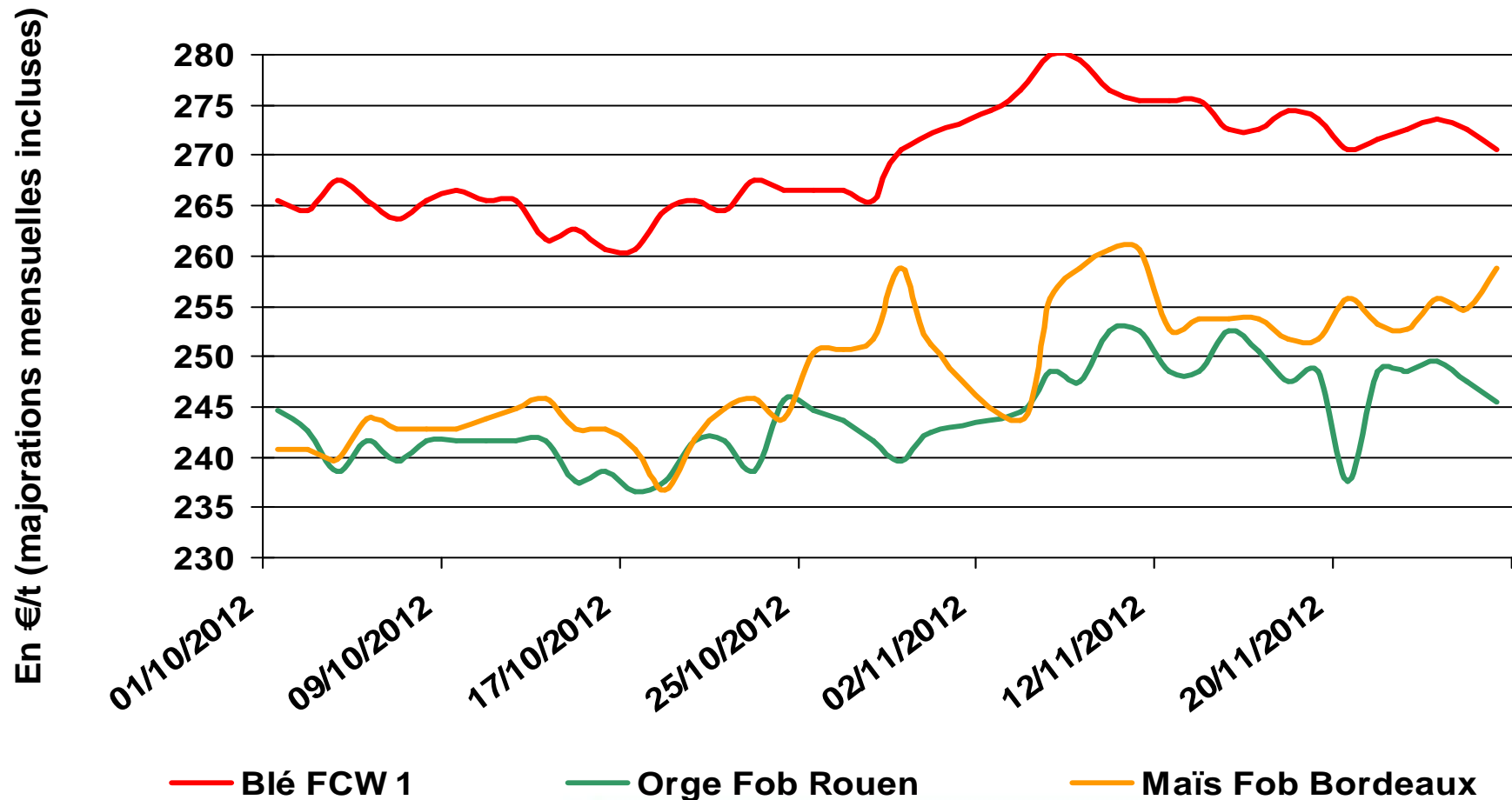
densité de collecte de blé tendre d'après les états 1 FranceAgriMer

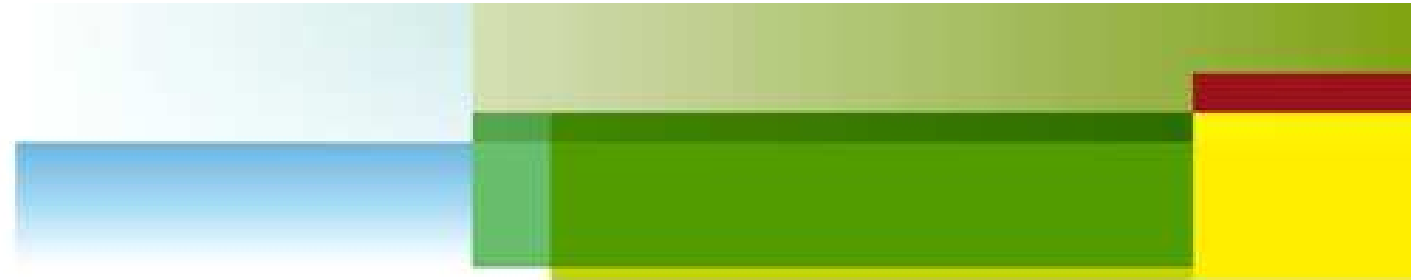


## Prix du blé tendre, de l'orge et du maïs en rendu Pontivy

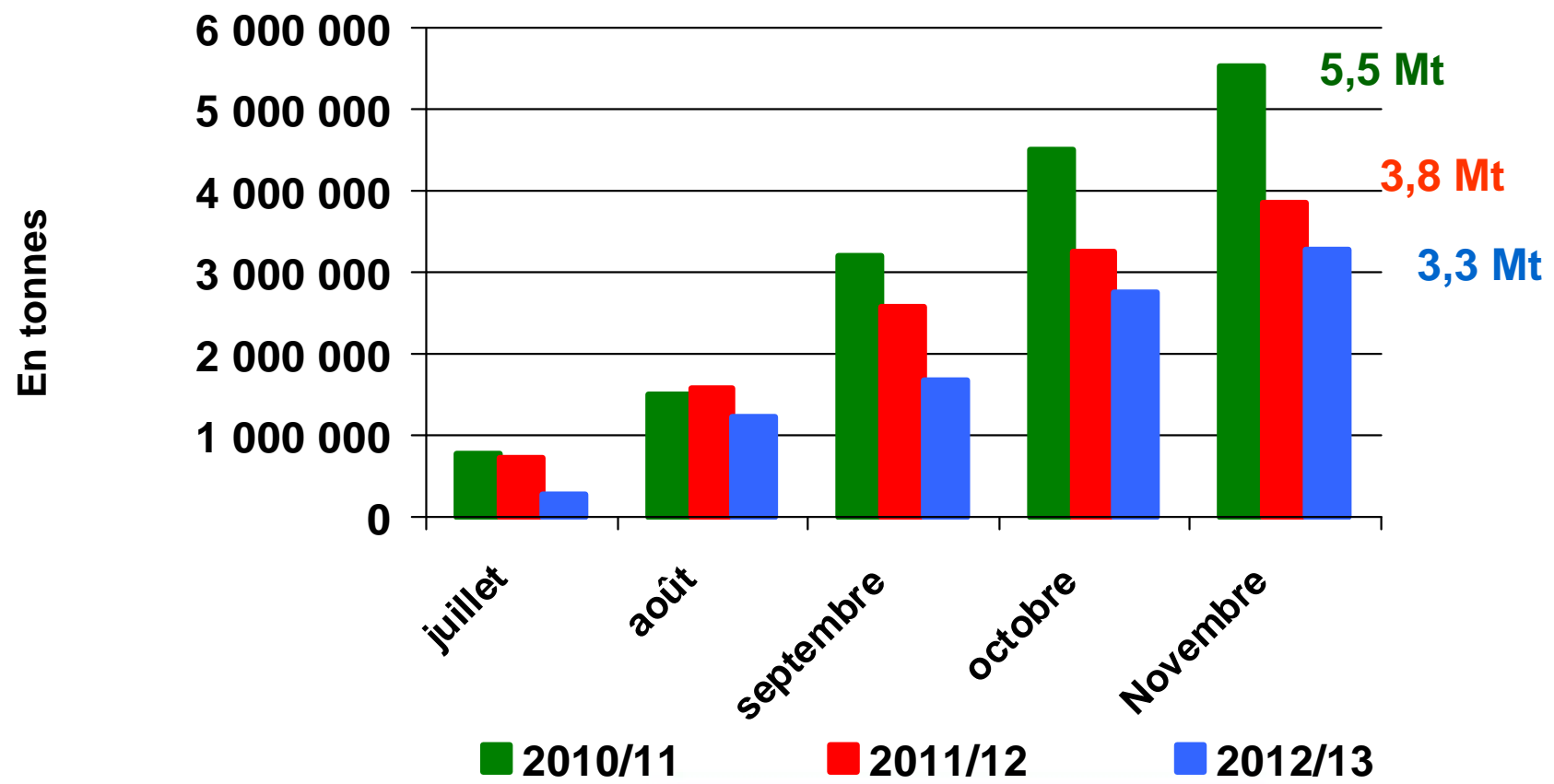


## Céréales françaises : cotations à l'exportation



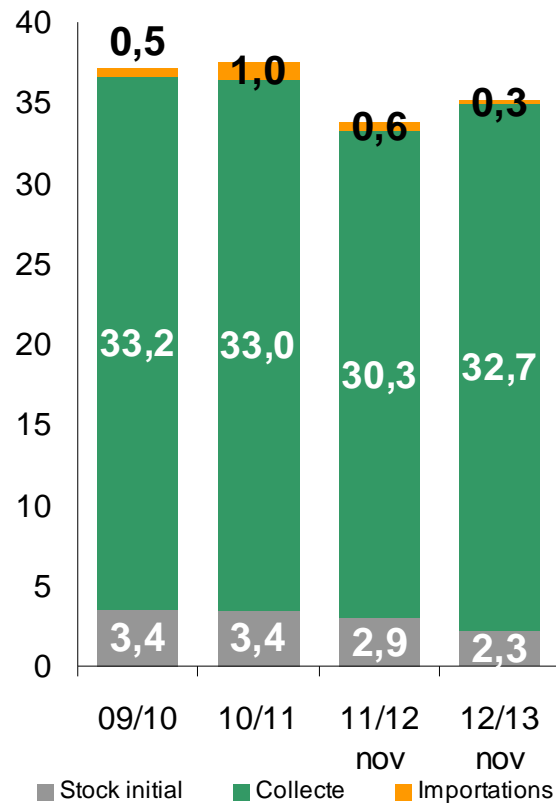


## Blé tendre : cumul des embarquements vers les pays tiers depuis les ports français

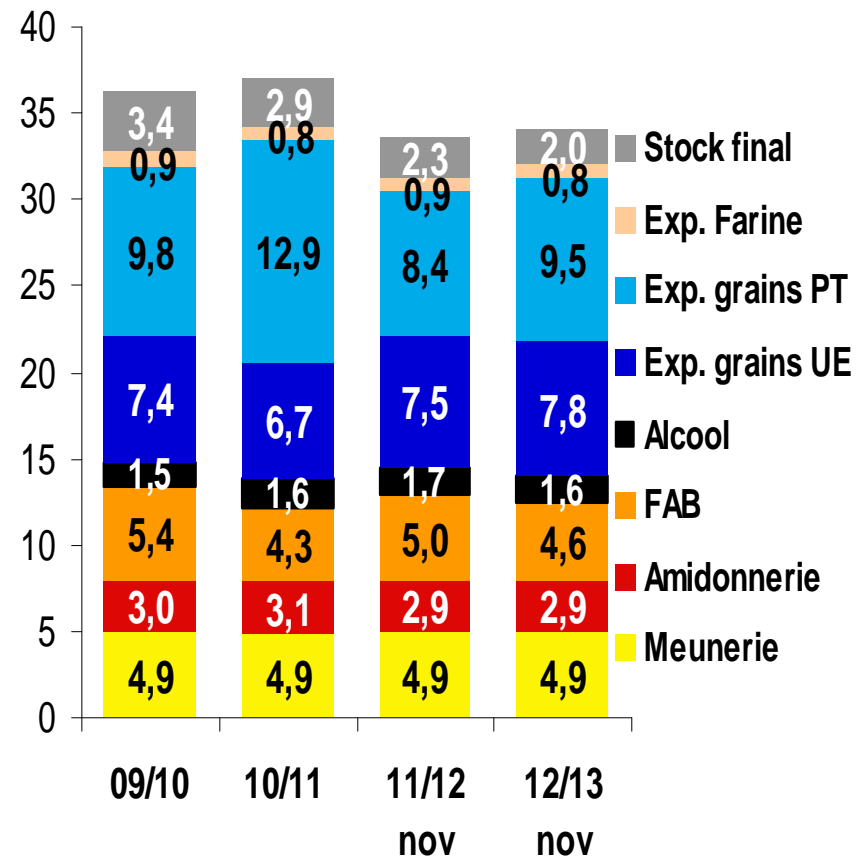


## Bilan blé tendre

Mt



Mt



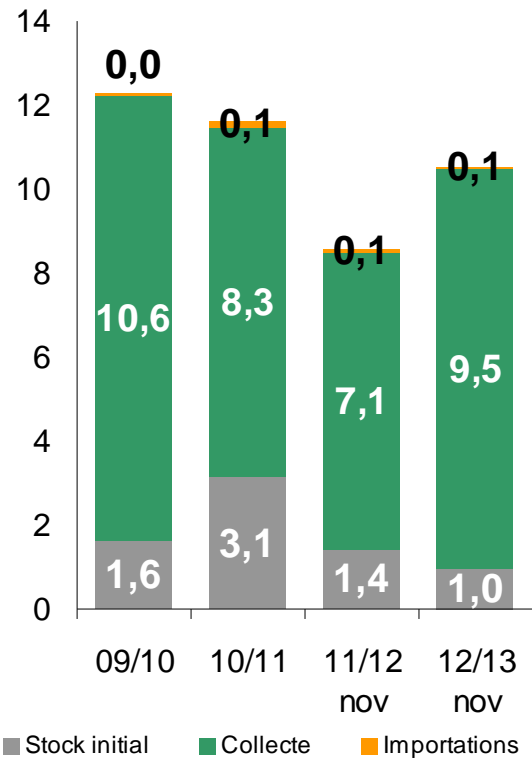
# Exportations pays tiers au départ de la France

En Mt, projection FranceAgriMer

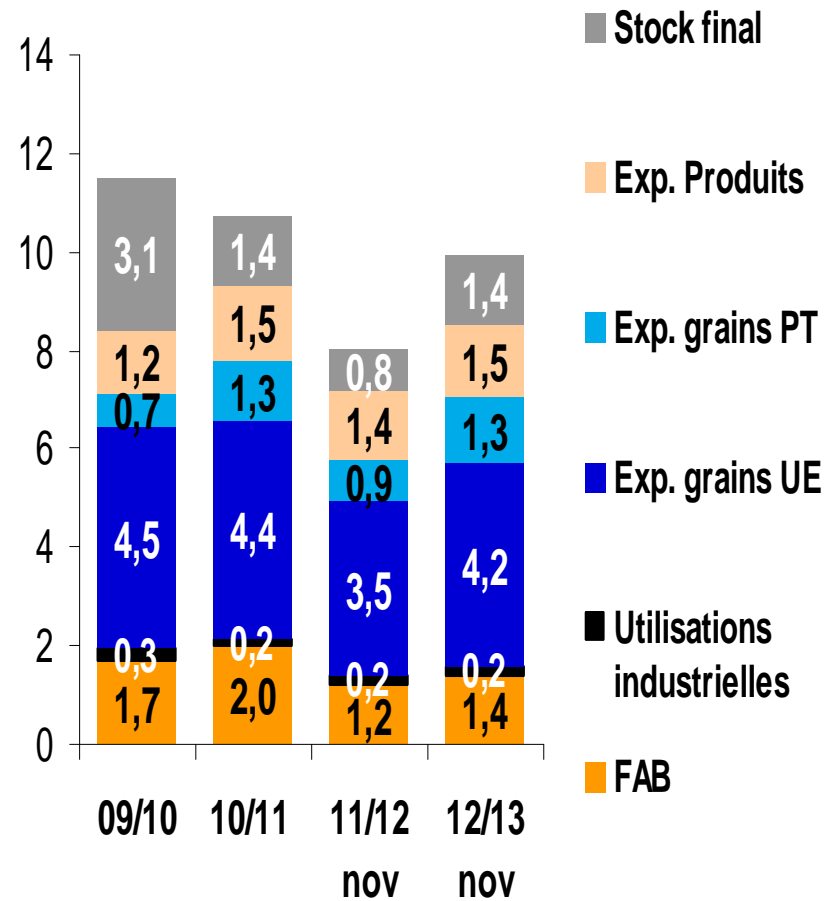
Maroc	2,5
Algérie	3,5
Tunisie	0,1
Lybie	0,1
Egypte	1,5
Ethiopie	-
Cuba	0,4
Syrie	-
Chine	-
Afrique subsaharienne	2,1
Yemen	0,4
<b>Autres</b>	-
<b>Total Pays-Tiers</b>	<b>10,6</b>

# Bilan orges

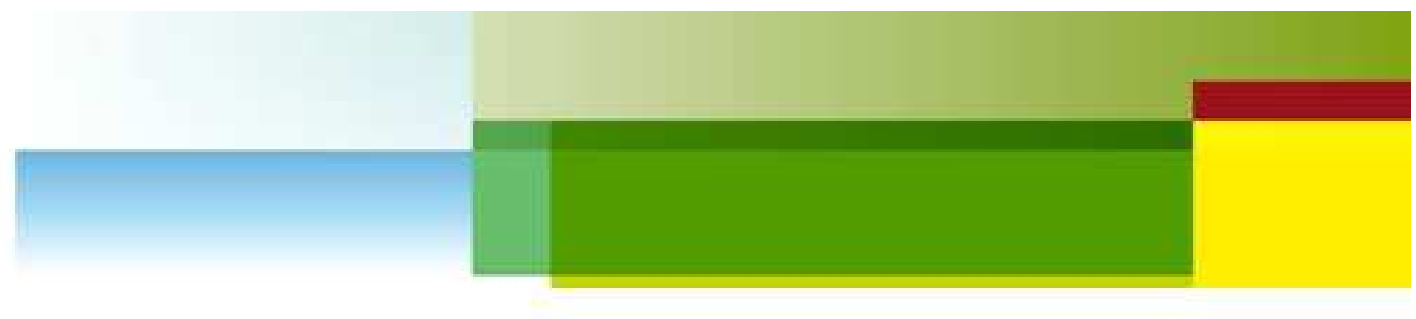
Mt



Mt

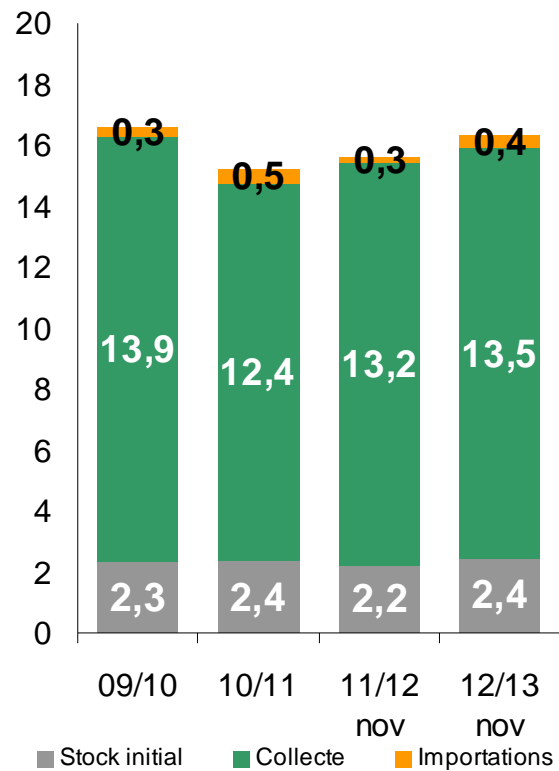




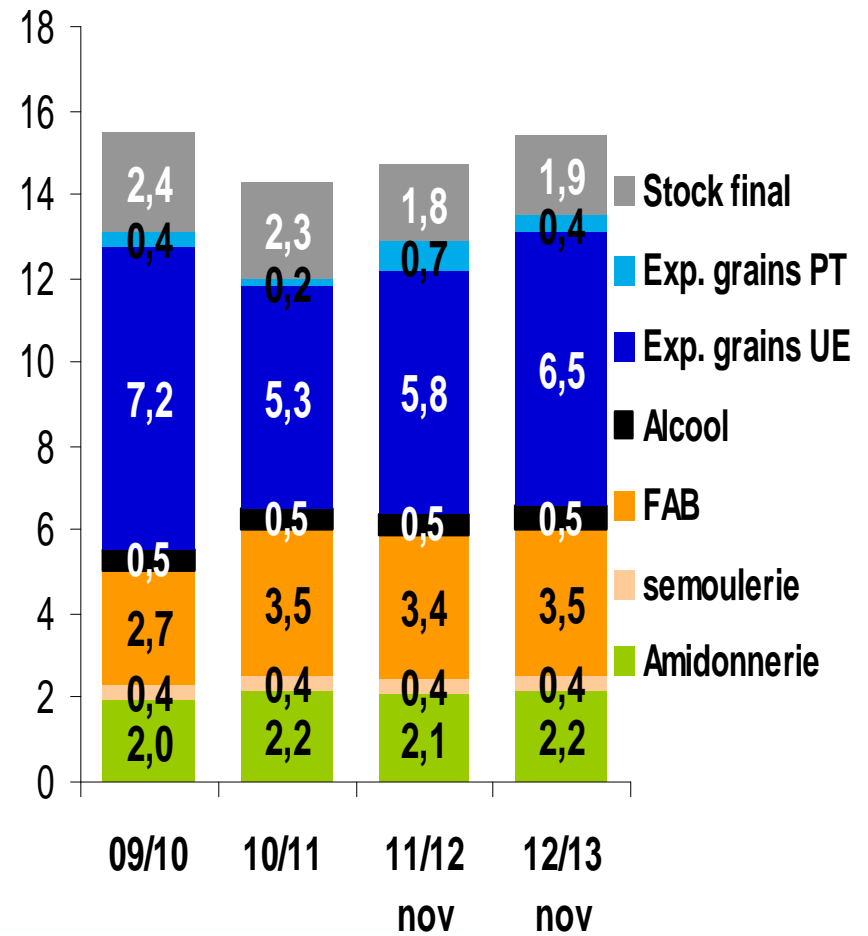


## Bilan maïs

Mt

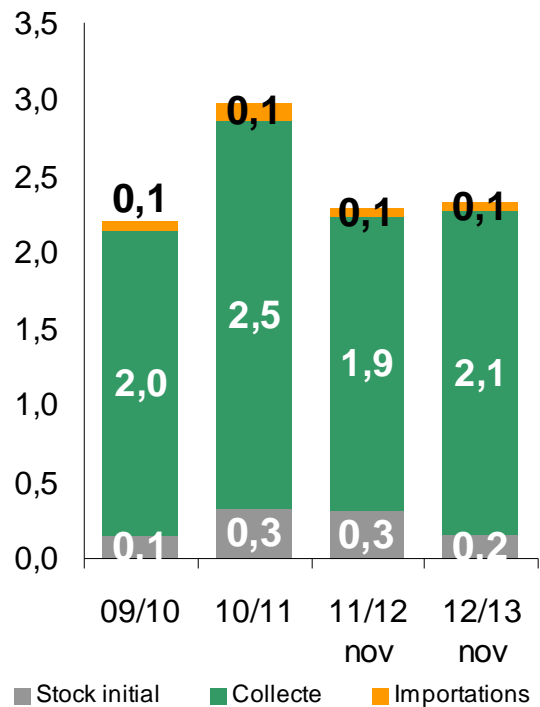


Mt

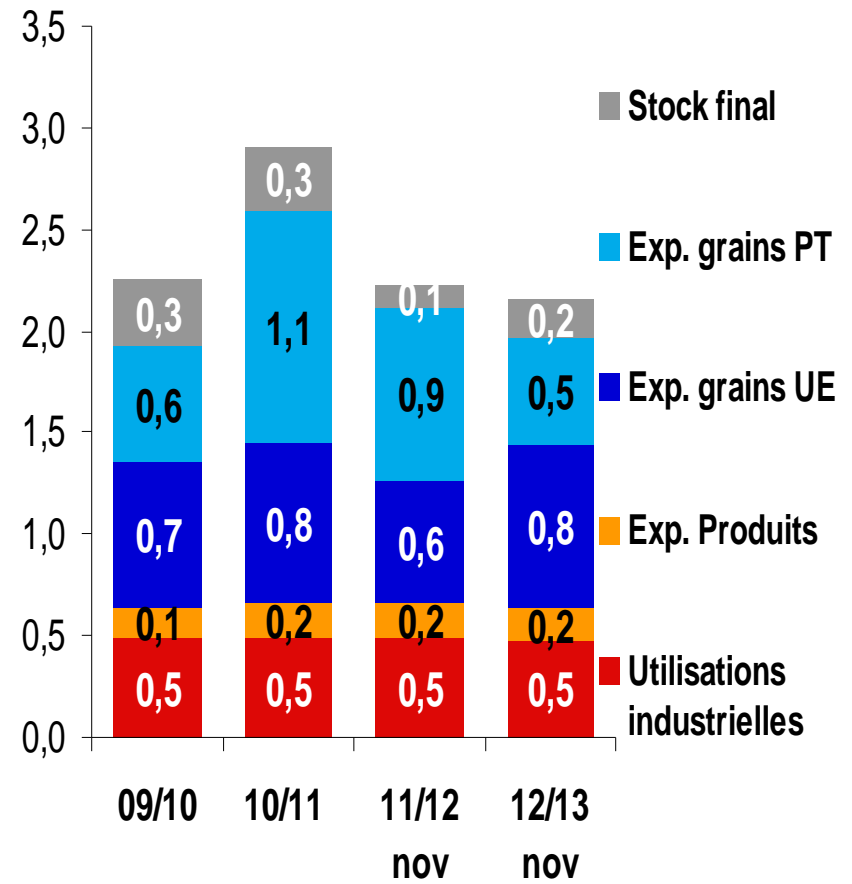


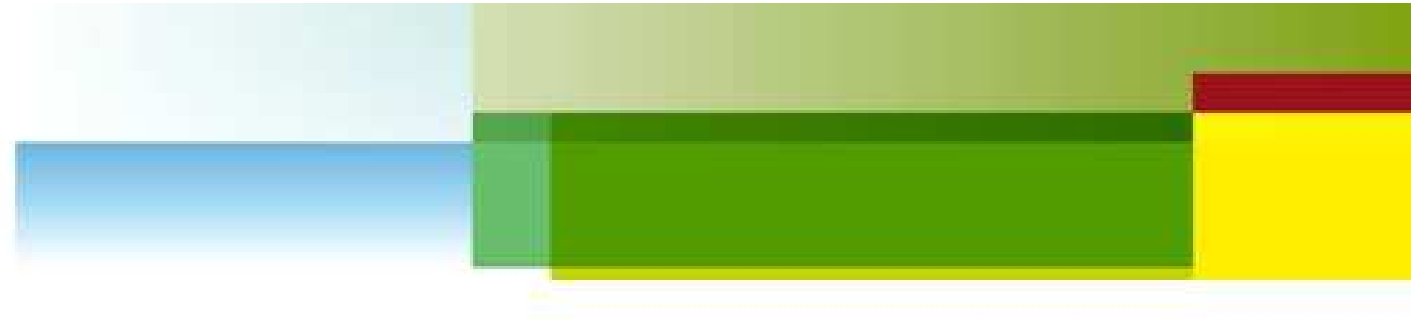
# Bilan blé dur

Mt



Mt





Merci de votre attention



