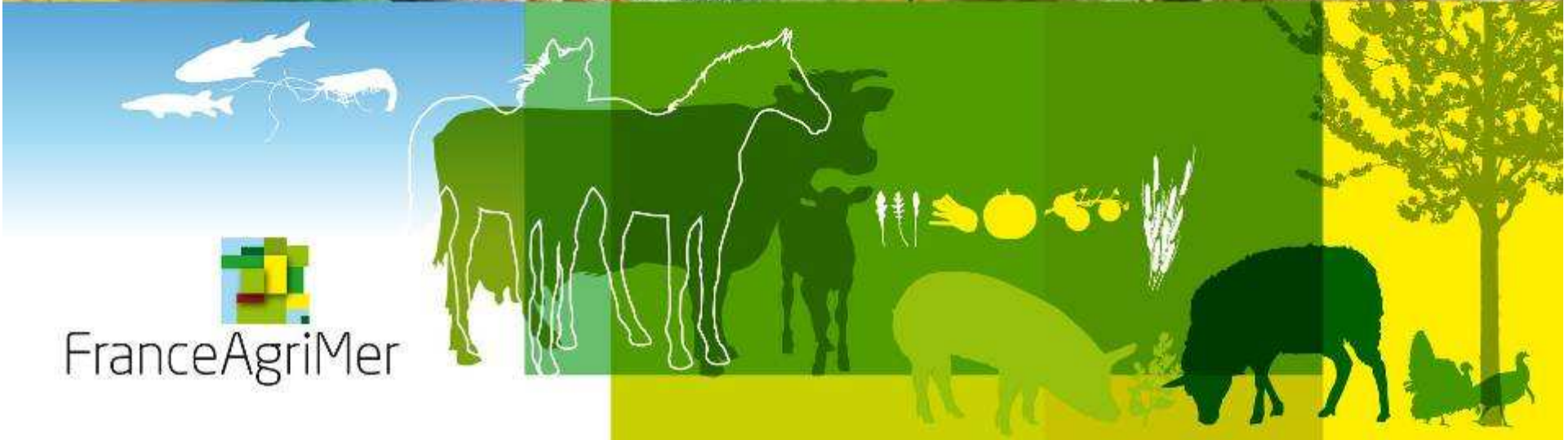


CÉRÉALES /  
FRUITS ET LÉGUMES /  
HORTICULTURE /  
LAIT /  
OLÉO-PROTÉAGINEUX /  
PÊCHE ET AQUACULTURE /  
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /  
SUCRE /  
VIANDES BLANCHES /  
VIANDES ROUGES /  
VINS /

# FranceAgriMer



FranceAgriMer



FranceAgriMer

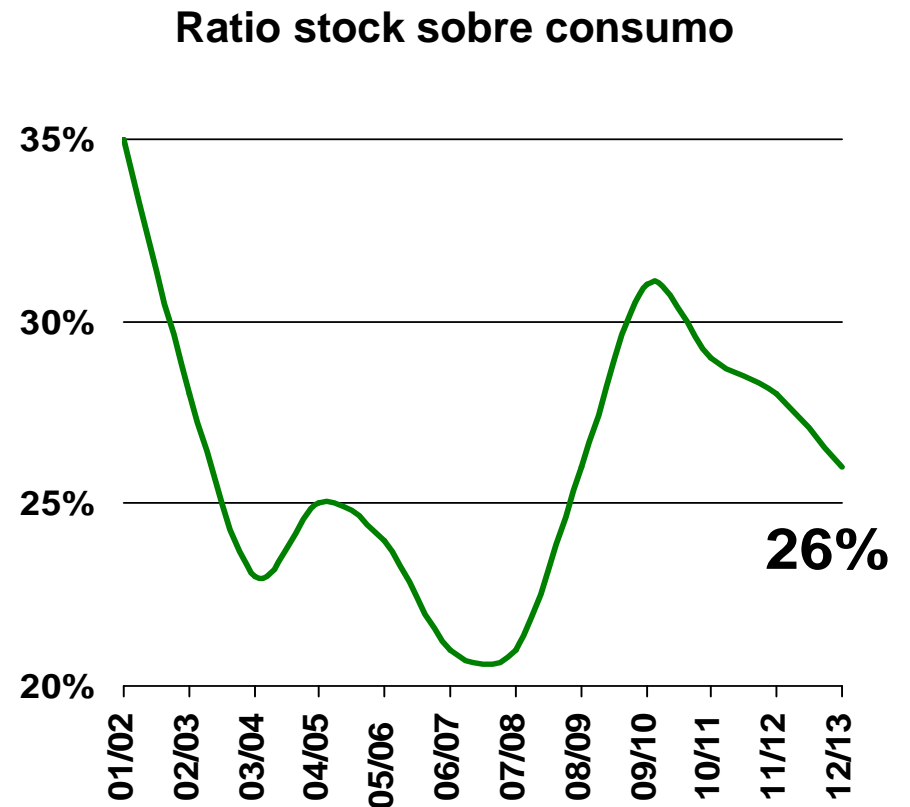
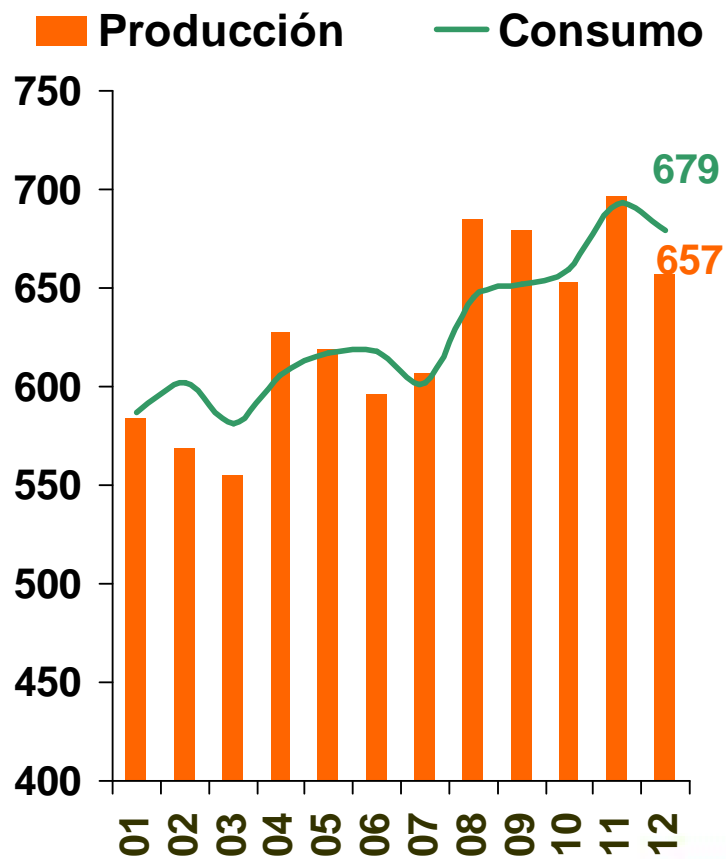
# Mercado mundial



## Puntos claves

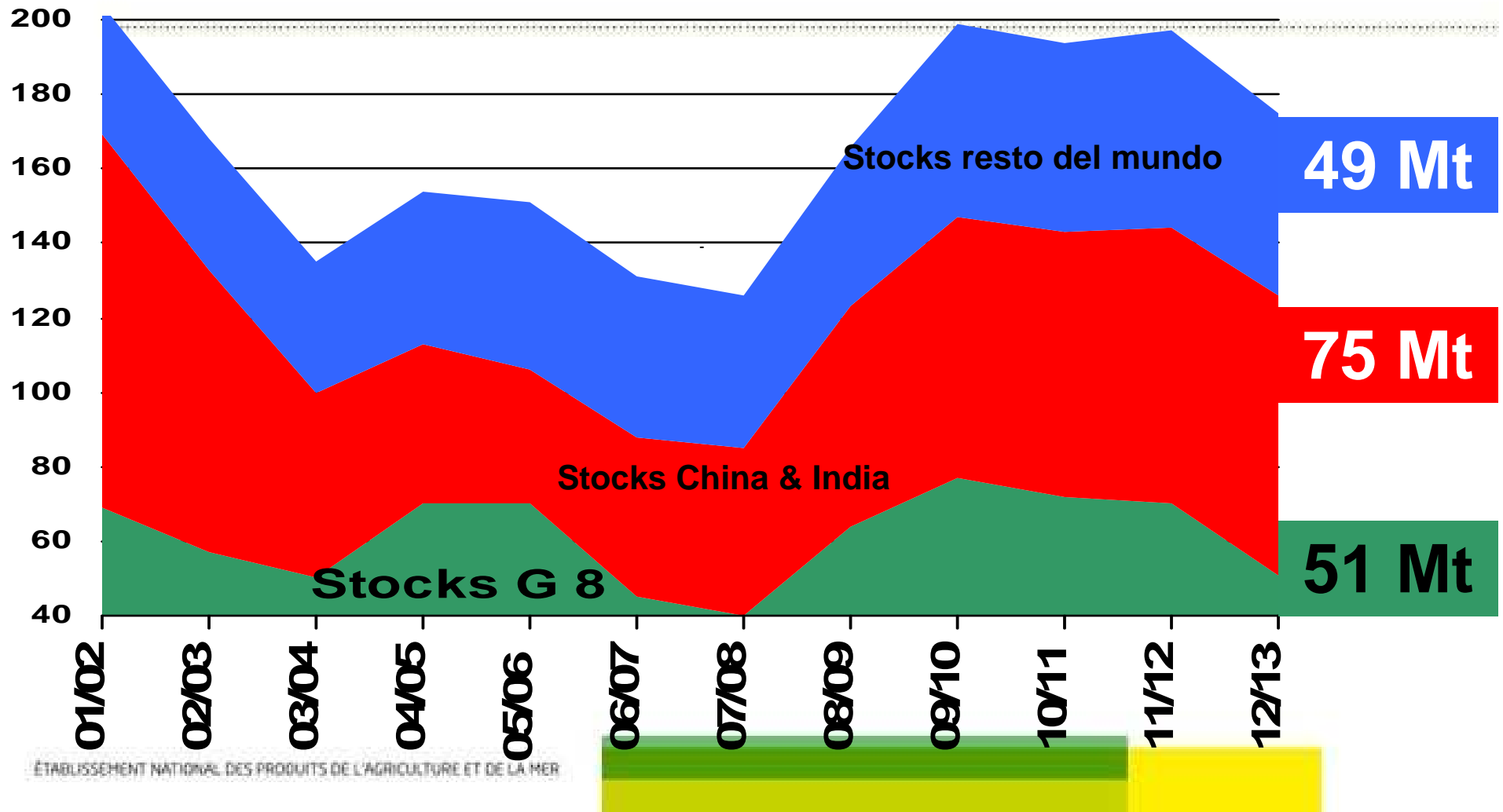
- Mundo
  - Existencias US de maíz inferiores a lo previsto
  - Las disponibilidades de trigo blando del Mar Negro, en vías de agotamiento
- UE
  - Fuerte revisión a la baja de la producción de maíz
  - Fuerte repunte de las adquisiciones de certificados de exportación de trigo blando
- Francia
  - Bajada de las cotizaciones del maíz
  - Récord de embarques en este principio de octubre

# Balance mundial de trigo 2012/13: producción, consumo y existencias

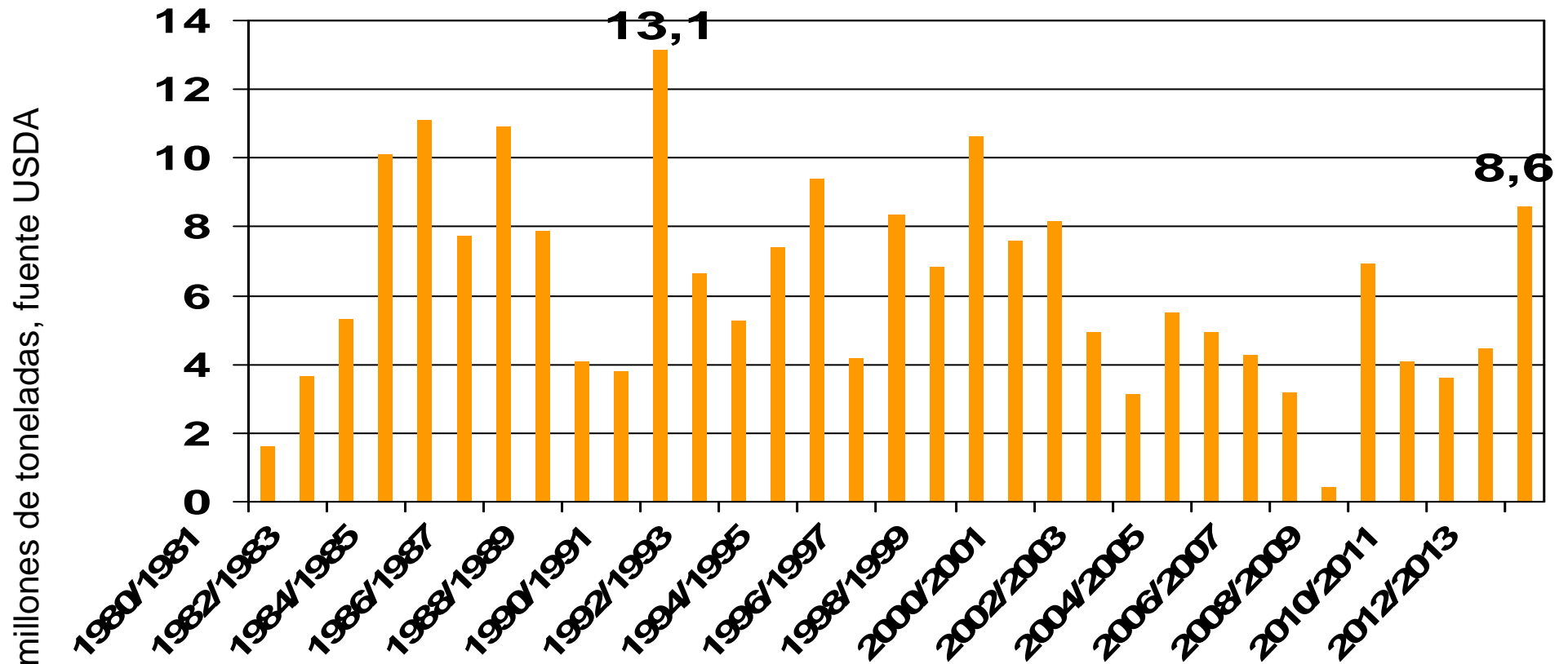


# Reparto de las existencias mundiales de trigo en 2012/13

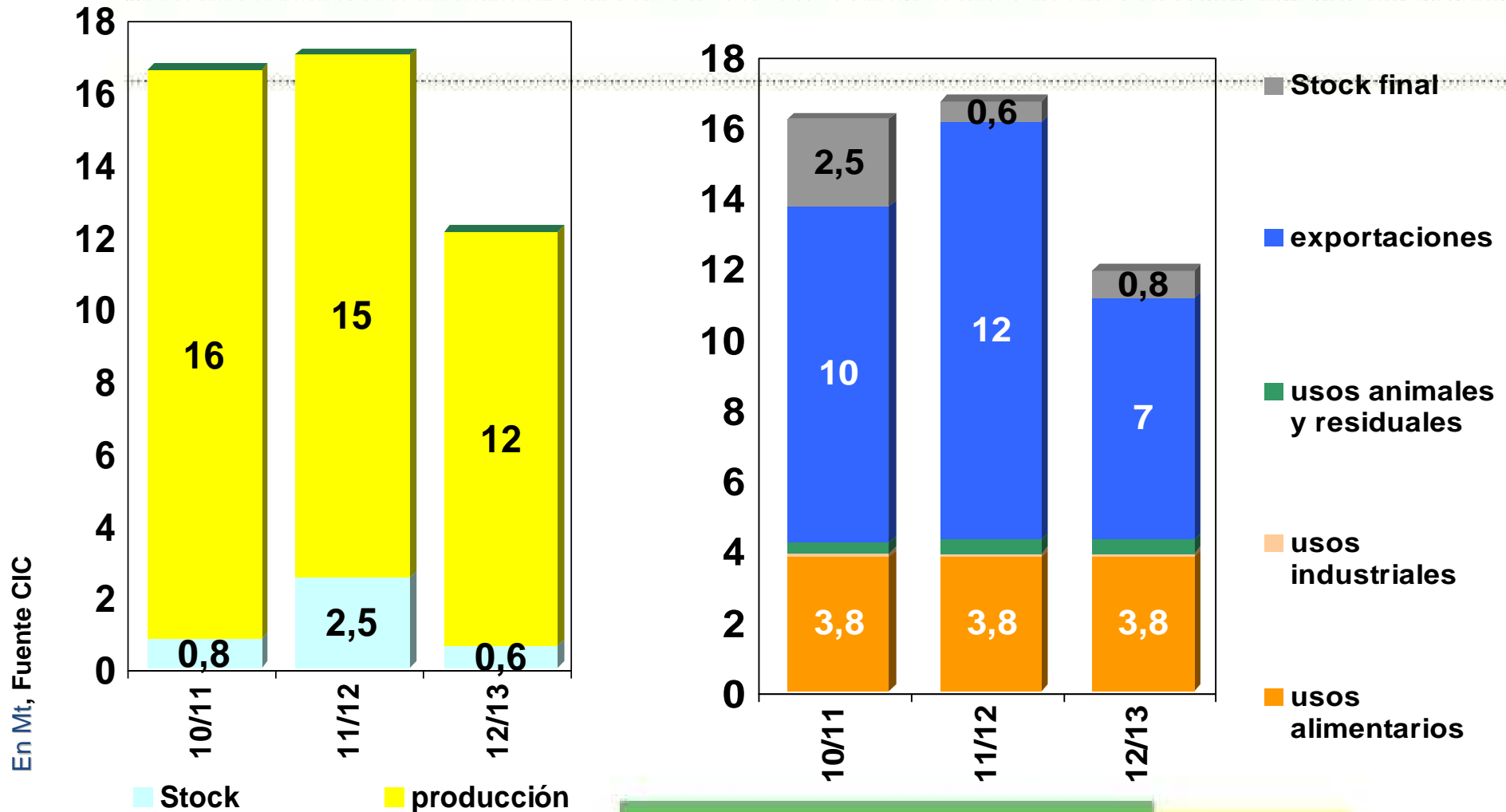
En Mt, fuente: CIC



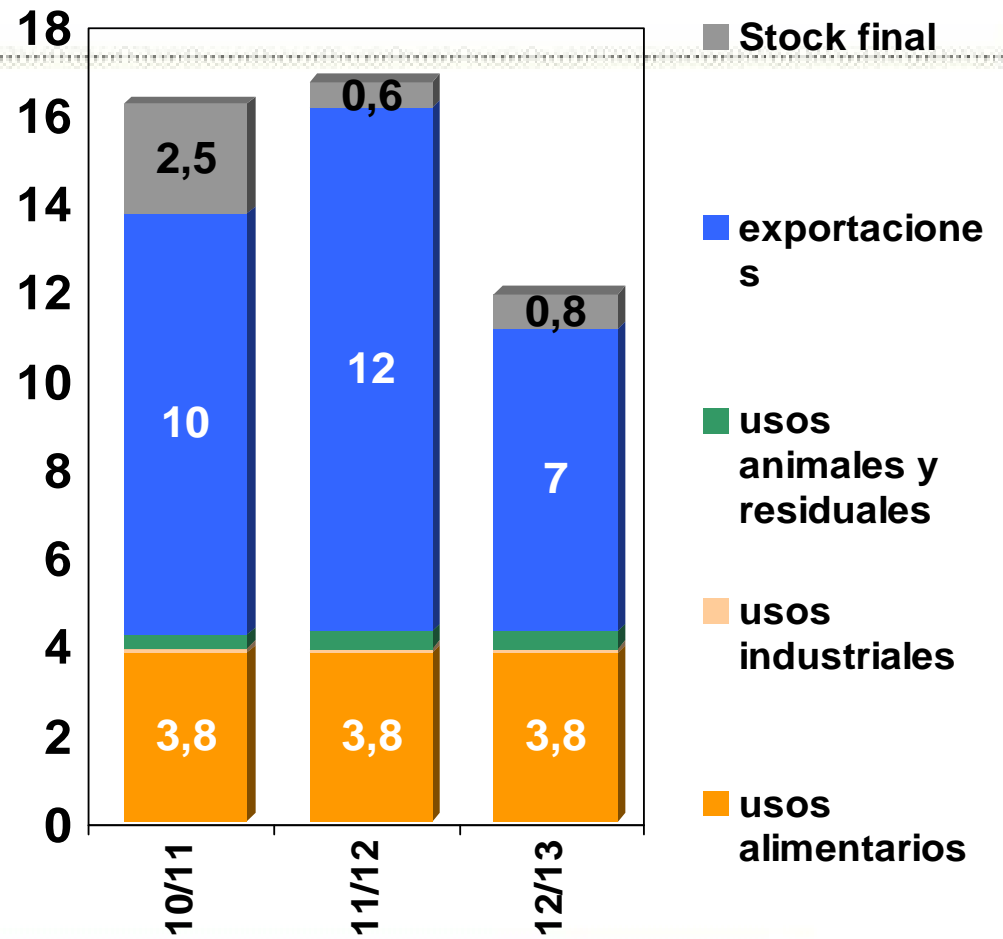
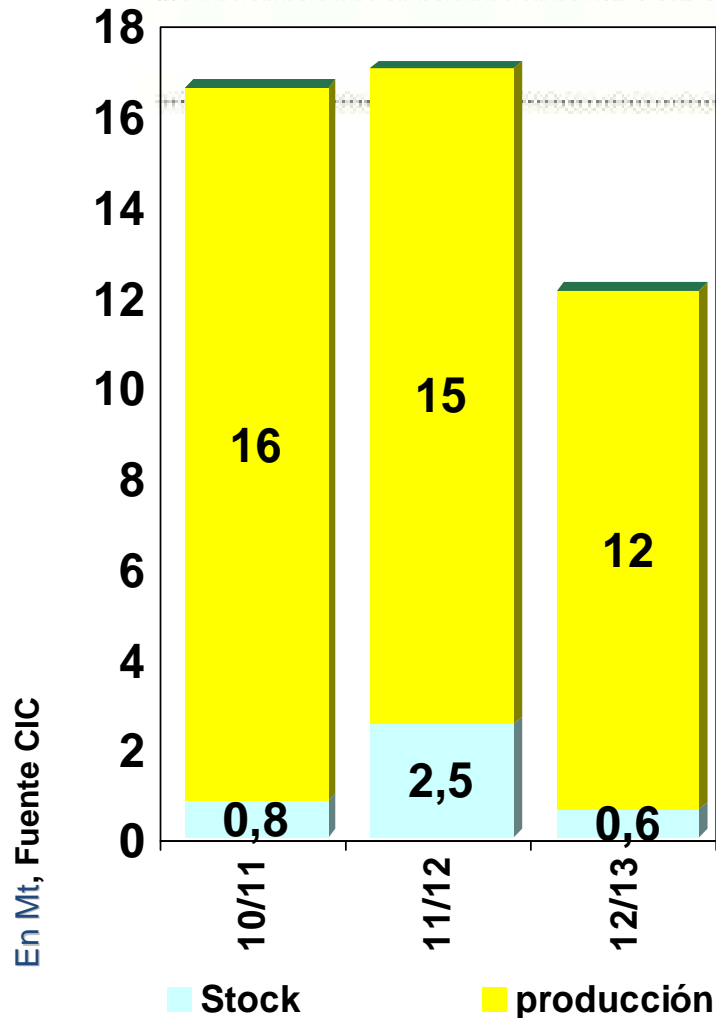
## Trigo americano: consumo animal



# Argentina: balance trigo



# Argentina: balance trigo



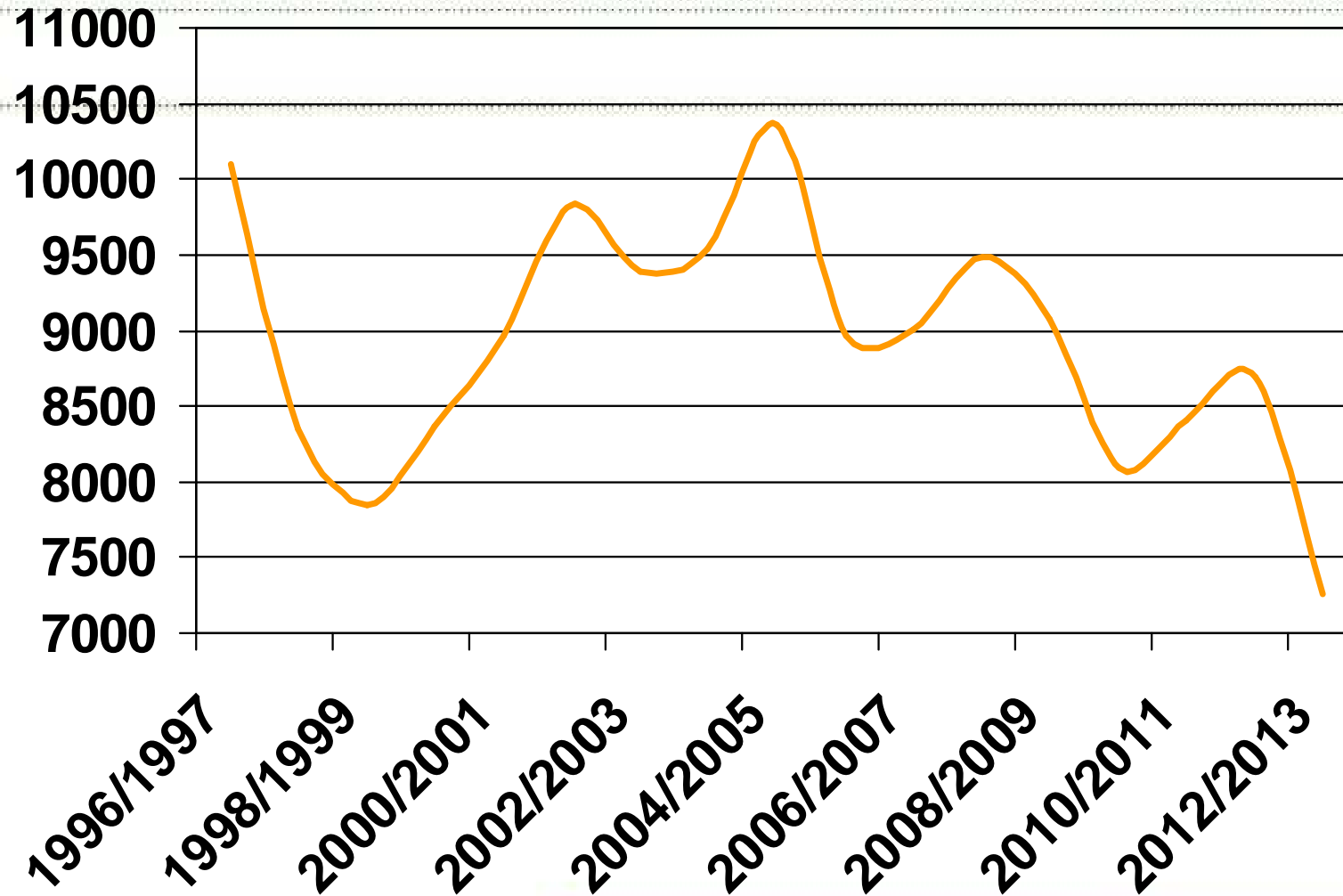




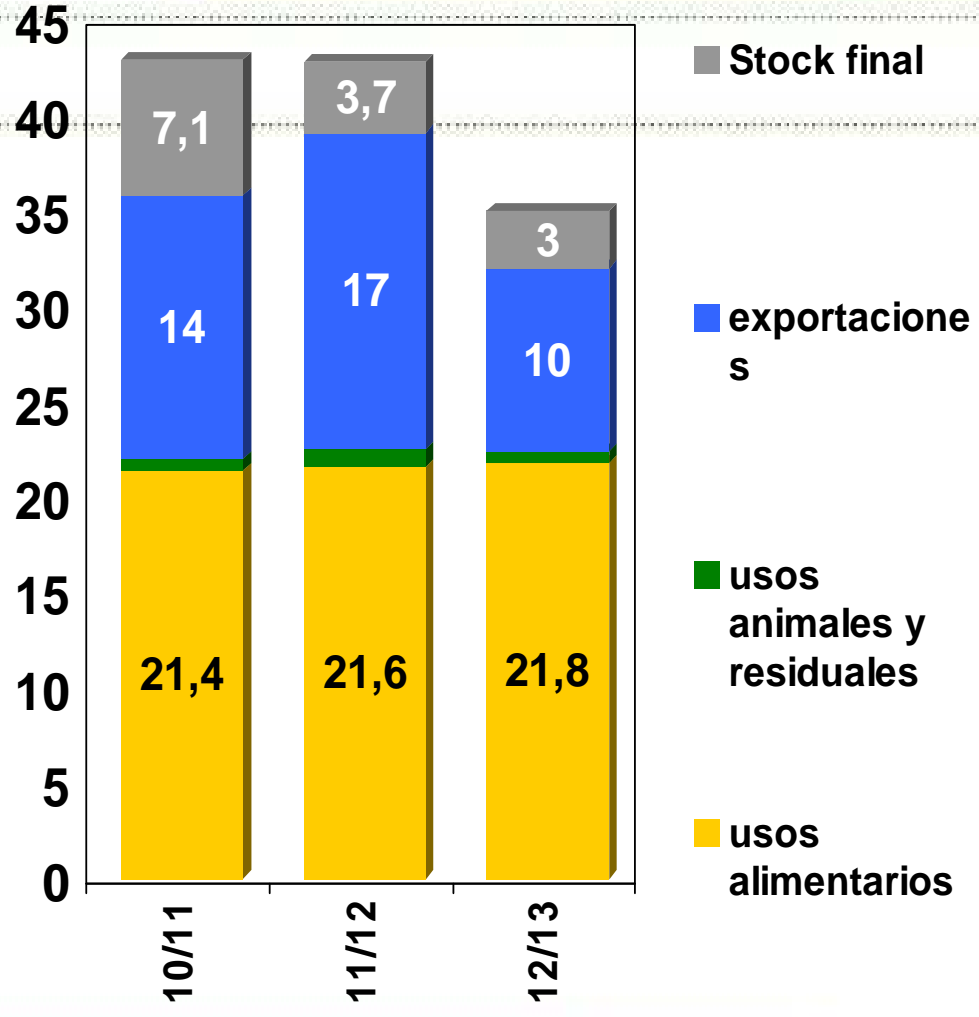
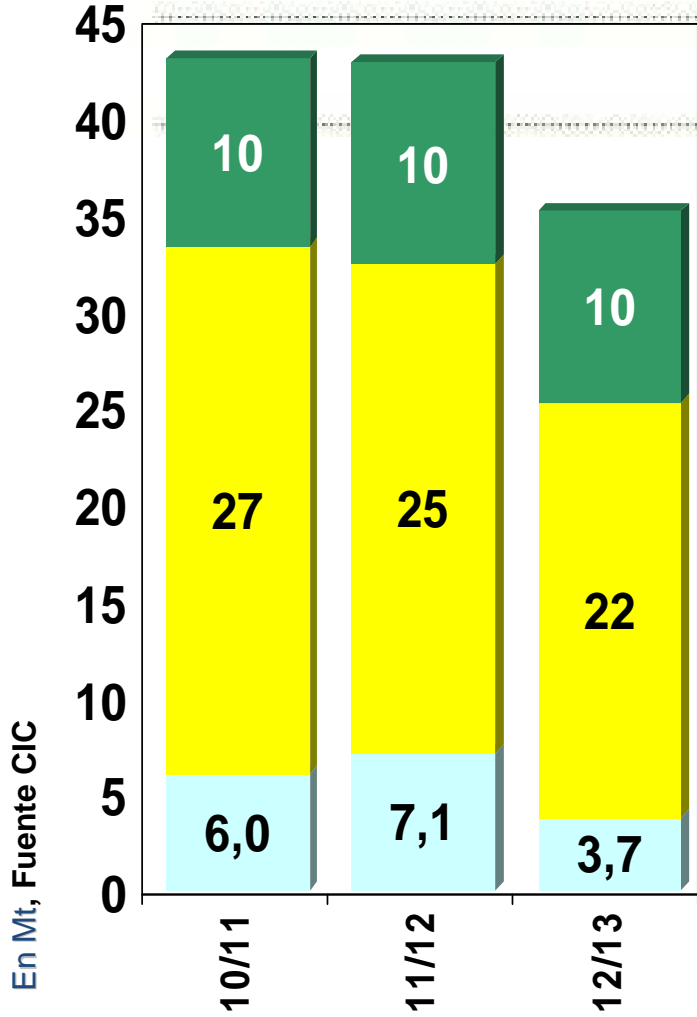
FranceAgriMer

## Superficies dedicadas al trigo Mercosur

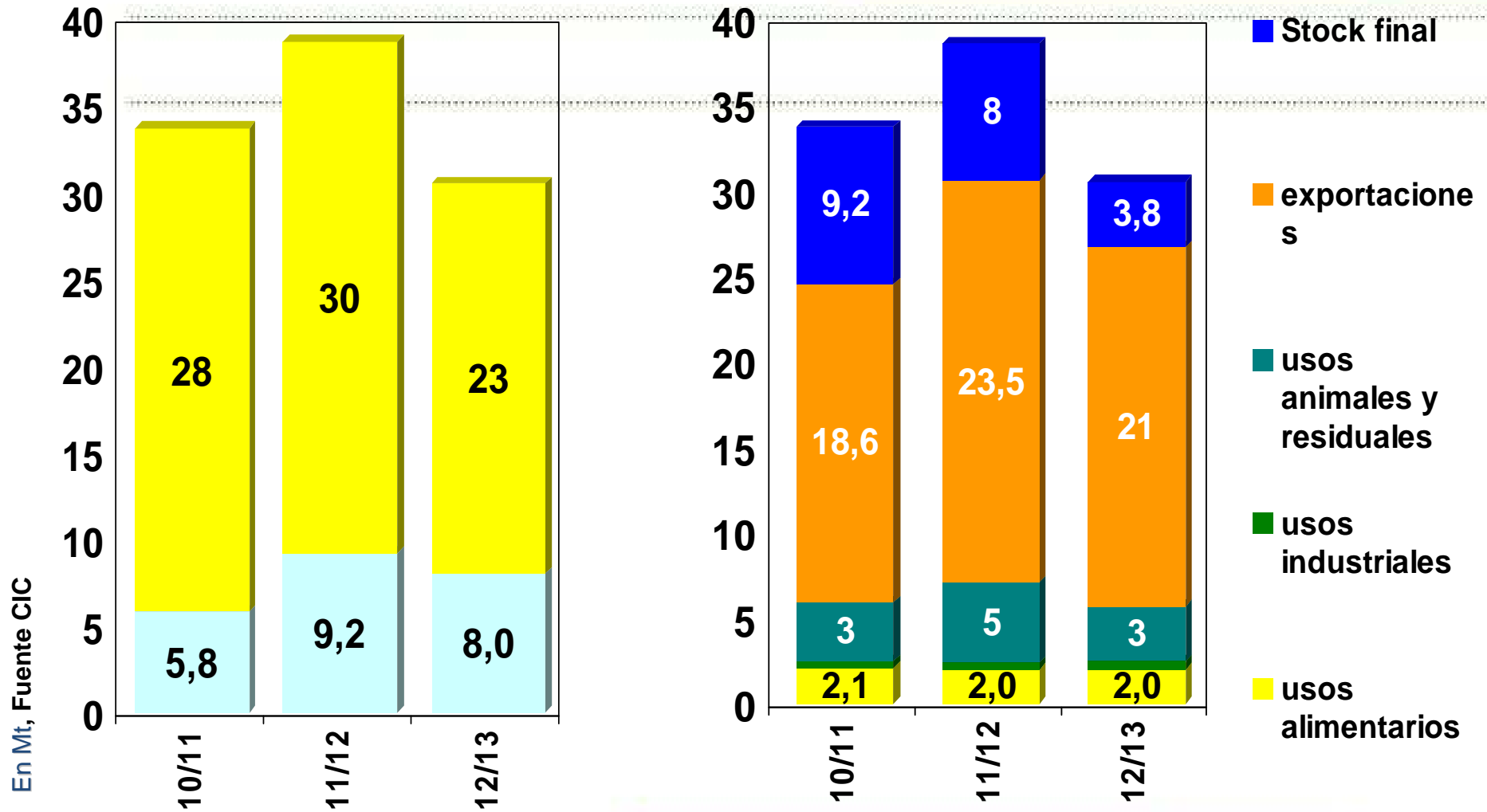
En 1 000 ha, fuente: USDA



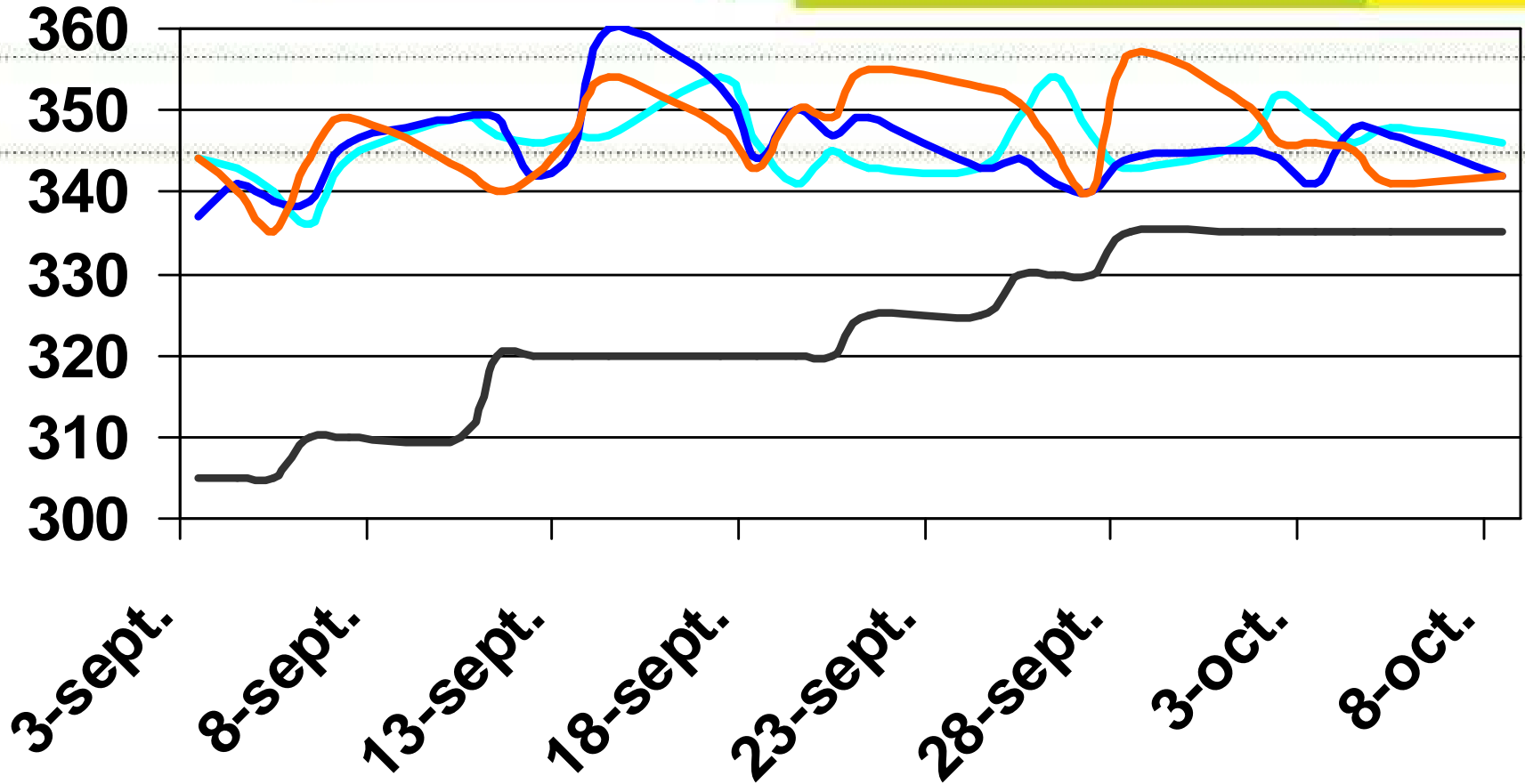
# Mercosur: balance trigo



# Australia: balance trigo



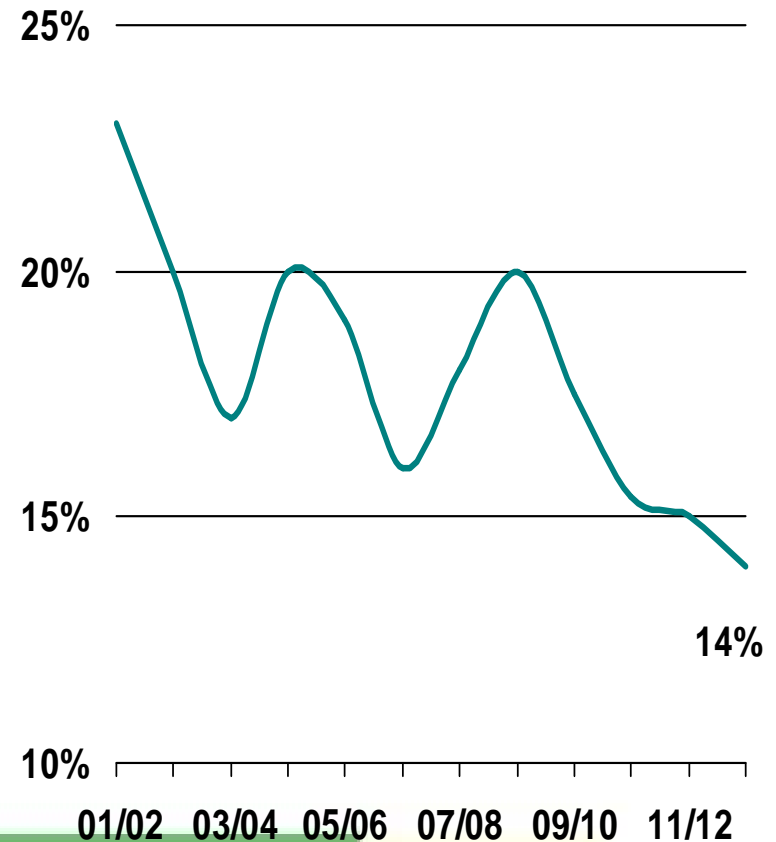
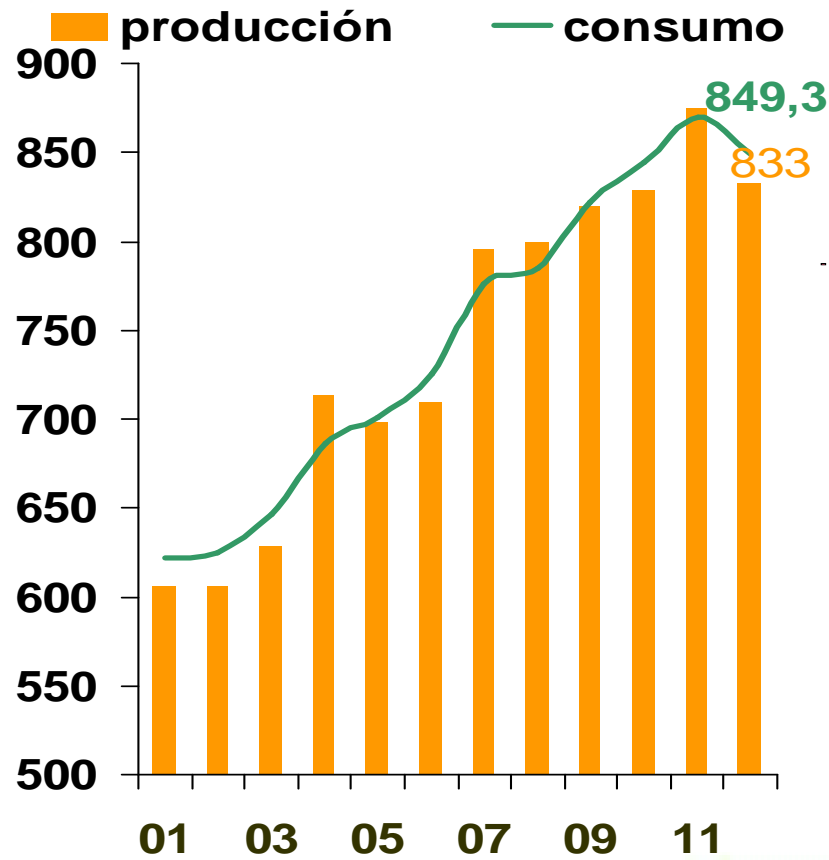
# Cotización del trigo



- Trigo blanco Australia oriental
- Forrajero mar Negro
- Fob Rouen

# Balance mundial de maíz 2012/13

Ratio stock sobre consumo

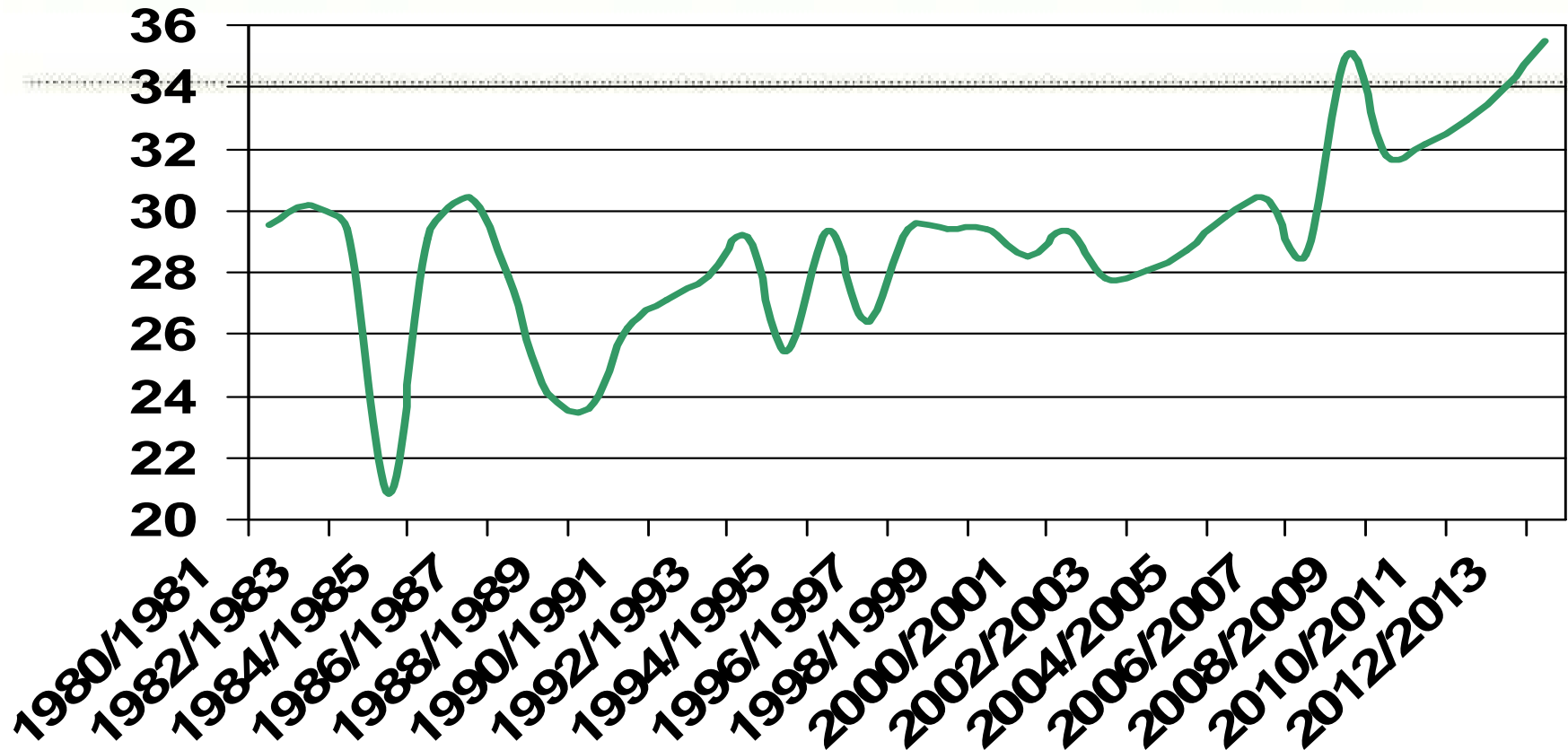




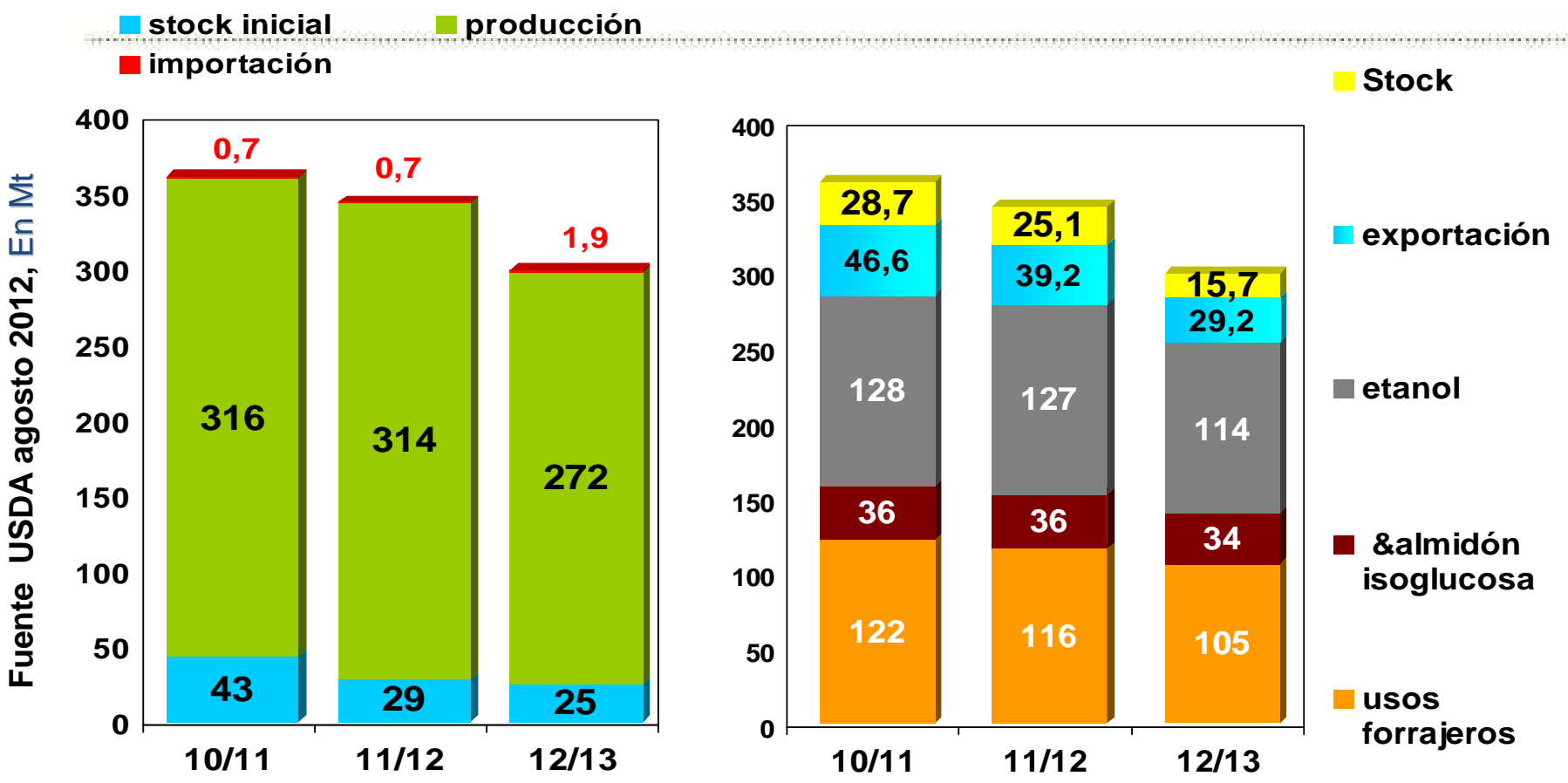
FranceAgriMer

# Superficies de maíz cosechadas en los Estados Unidos

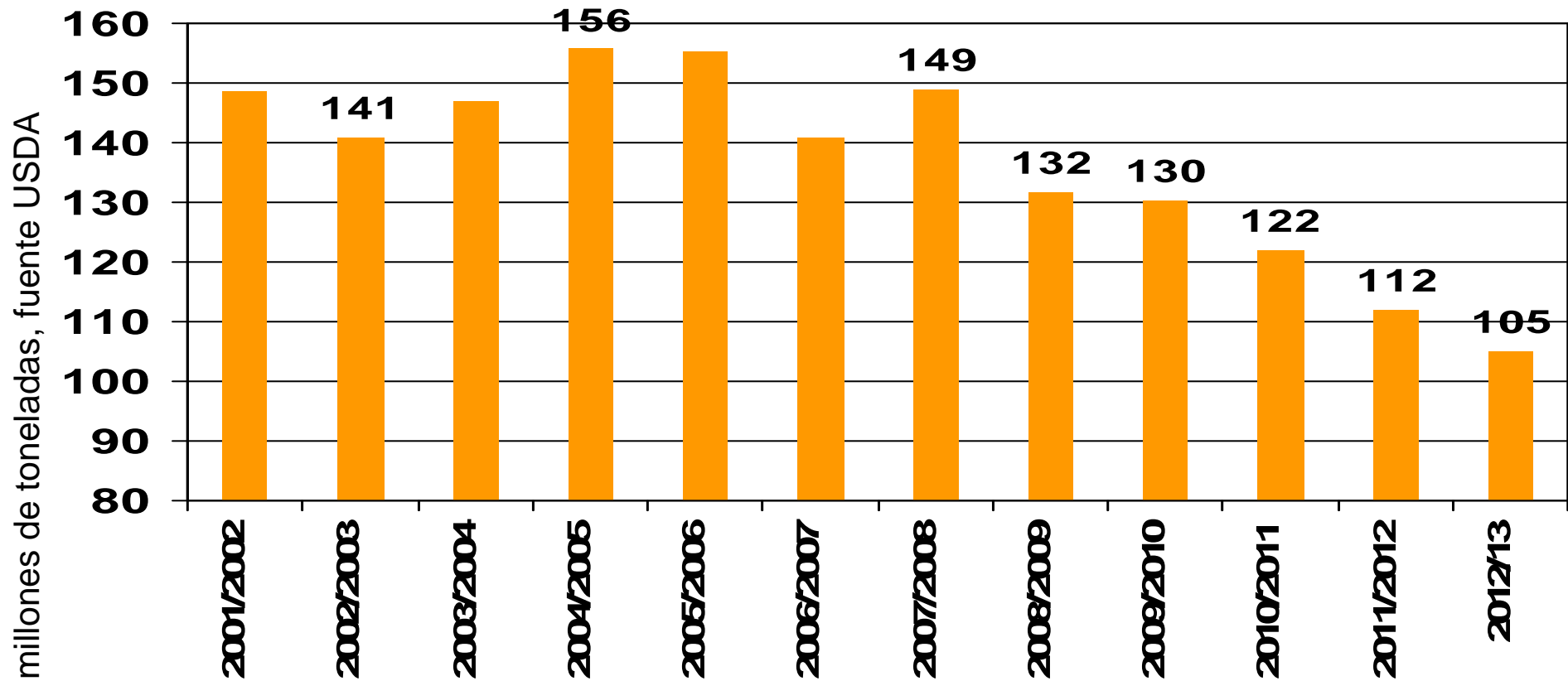
En Mha, fuente USDA



# Estados Unidos, balance maíz 2012/13 : Existencias esperadas del orden de 16 Mt



## Maíz americano: consumo animal

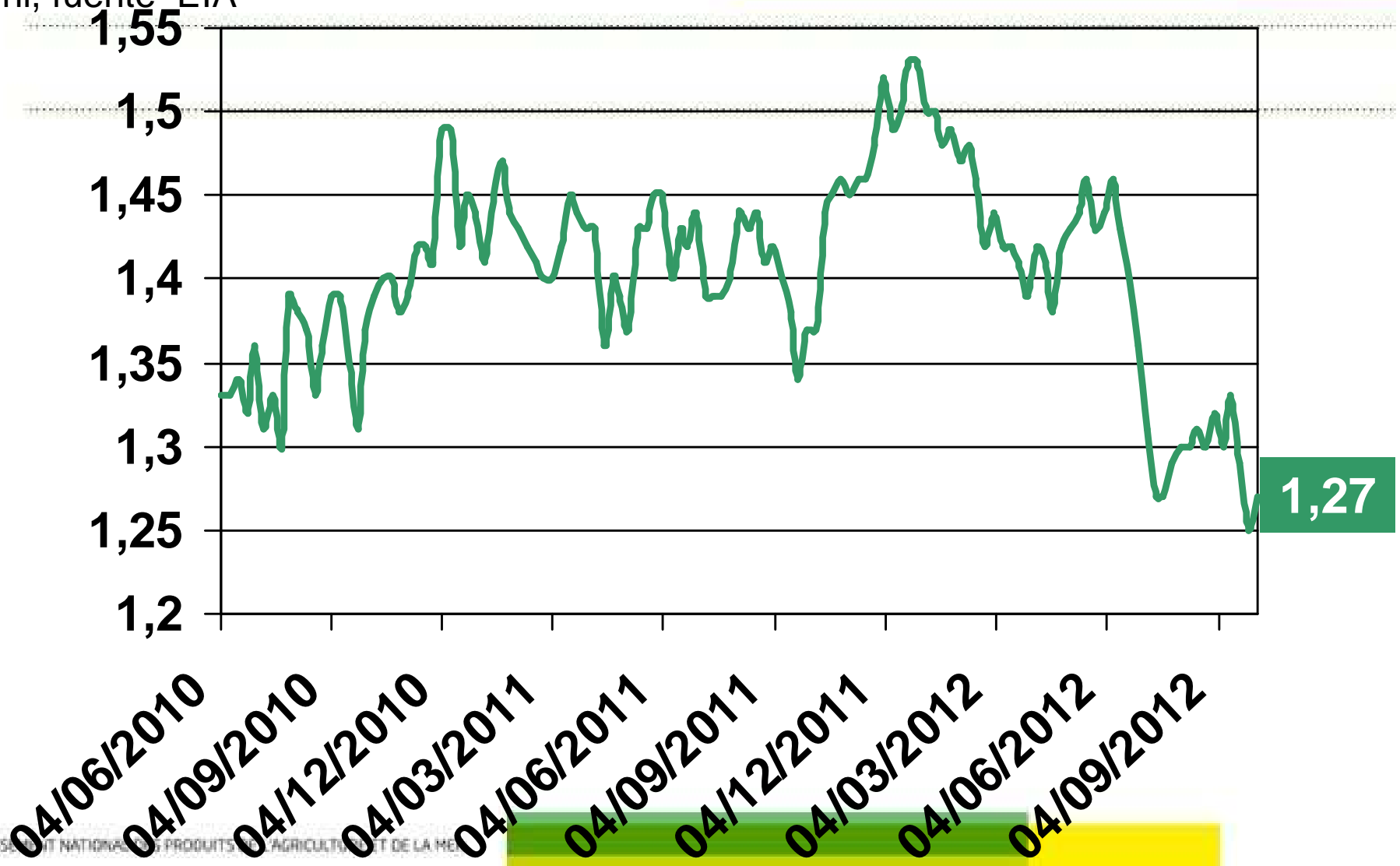


En millones de toneladas, fuente USDA



# Producción semanal de etanol en los Estados Unidos

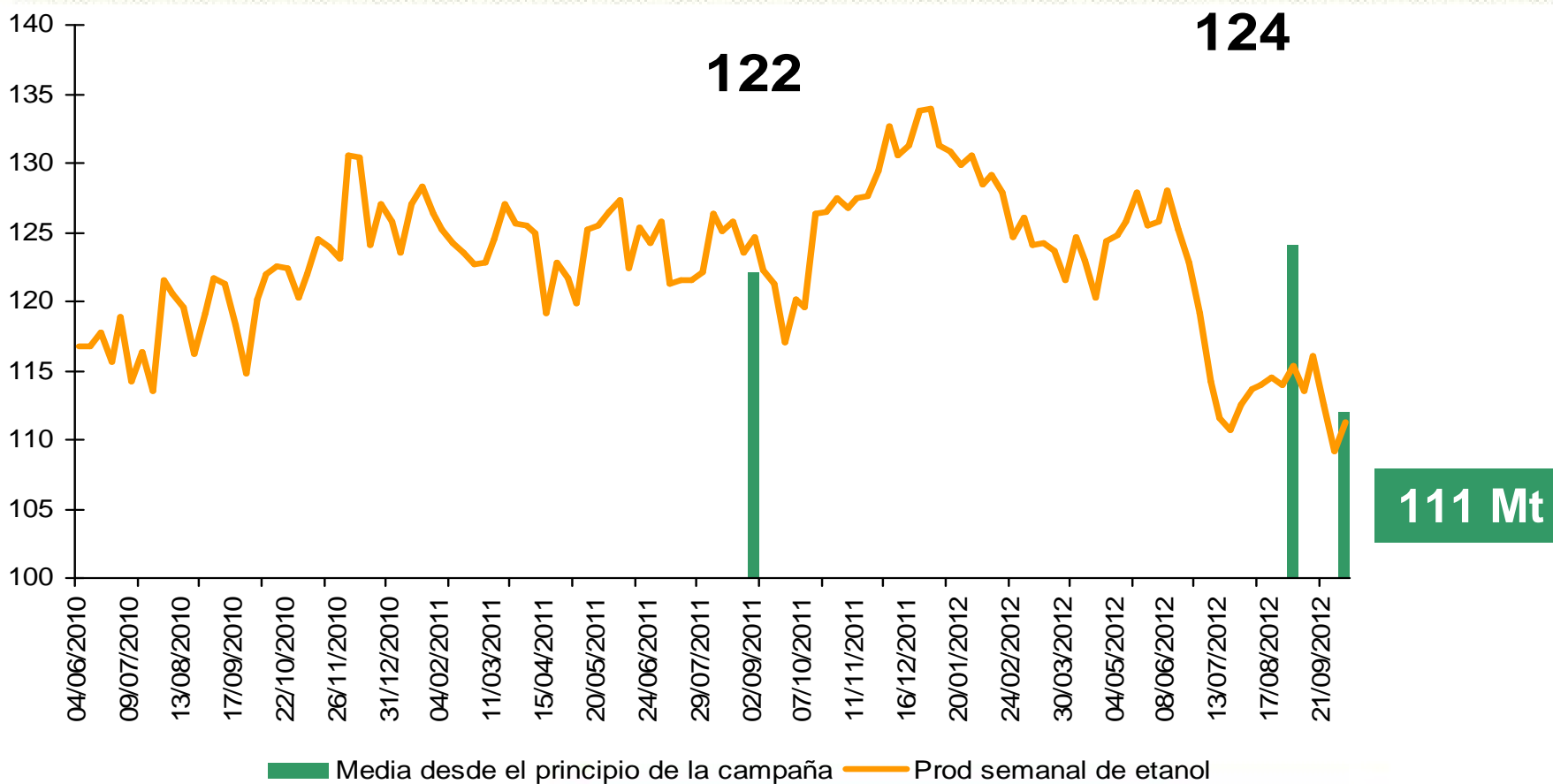
En Mhl, fuente EIA



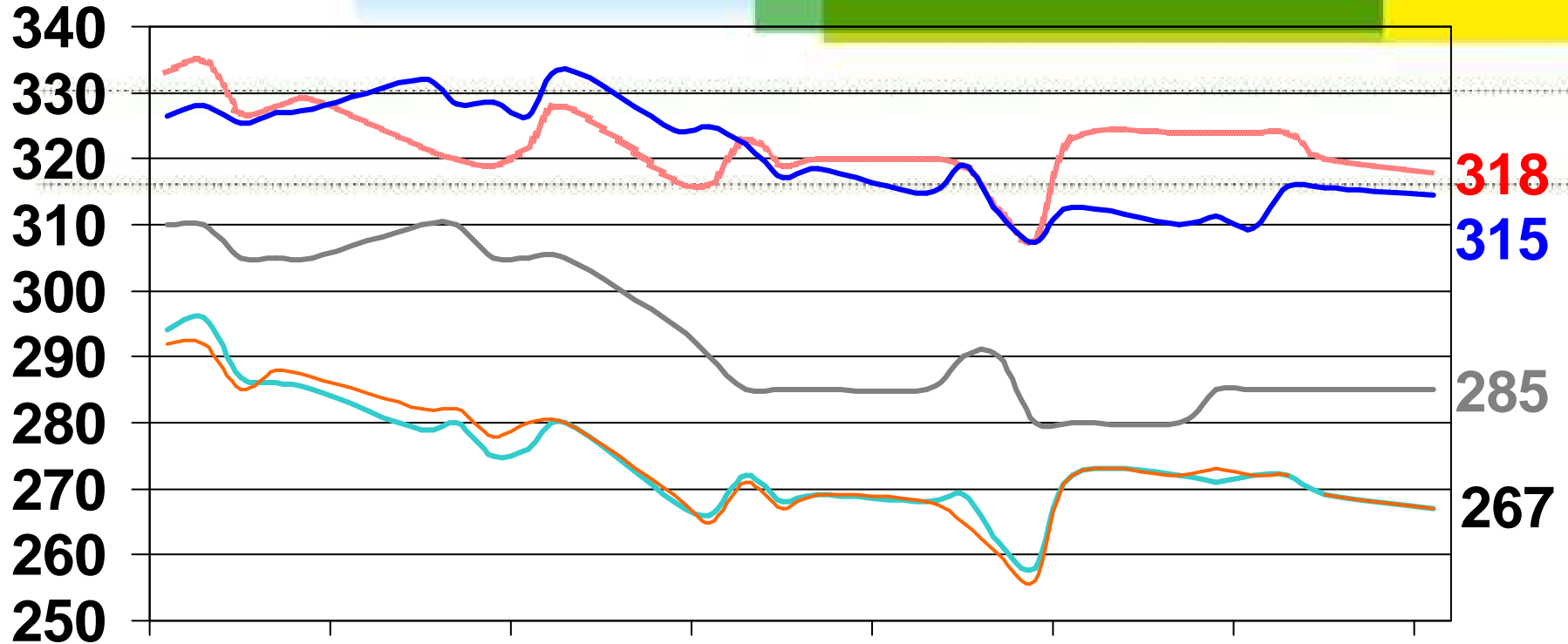
# Equivalente toneladas anuales de maíz de la producción semanal de etanol en los Estados Unidos

**Previsión USDA : 114 Mt**

En Mt, cálculo de FranceAgriMer



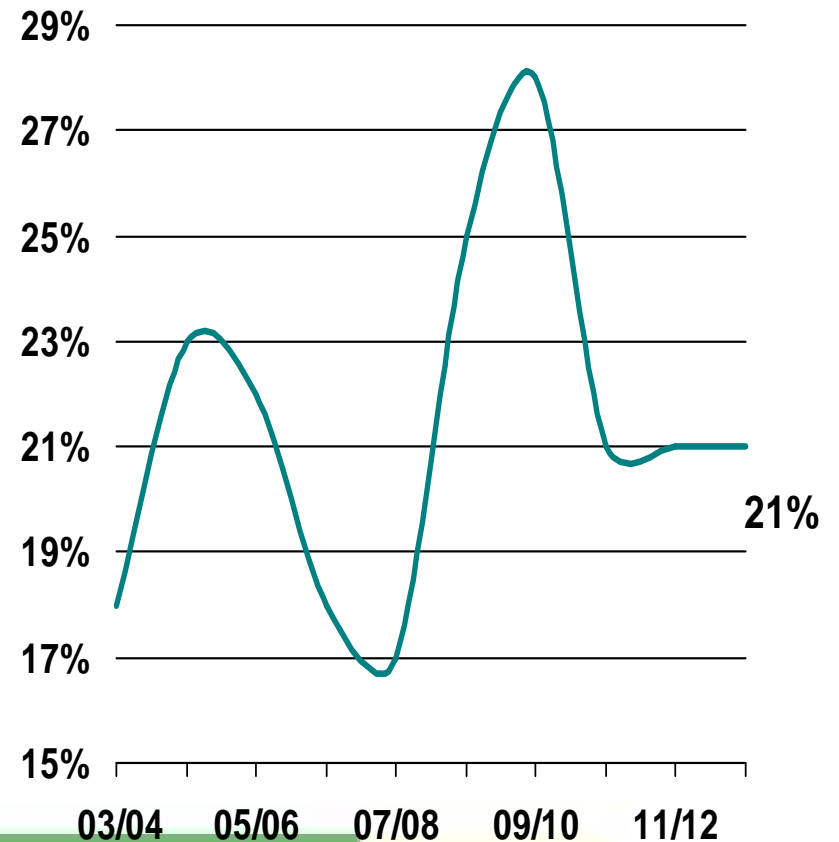
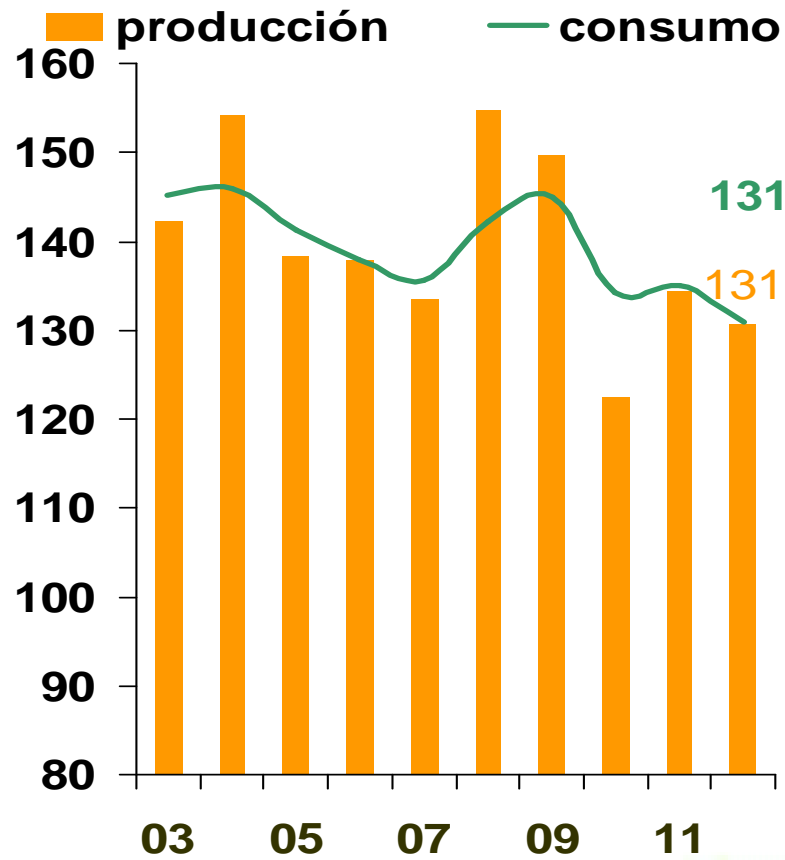
# Cotización del maíz



— Argentina Feed Up River    — Black Sea Feed    — Brazil feed Paranagua  
— US 3YC Gulf    — Fob Burdeos

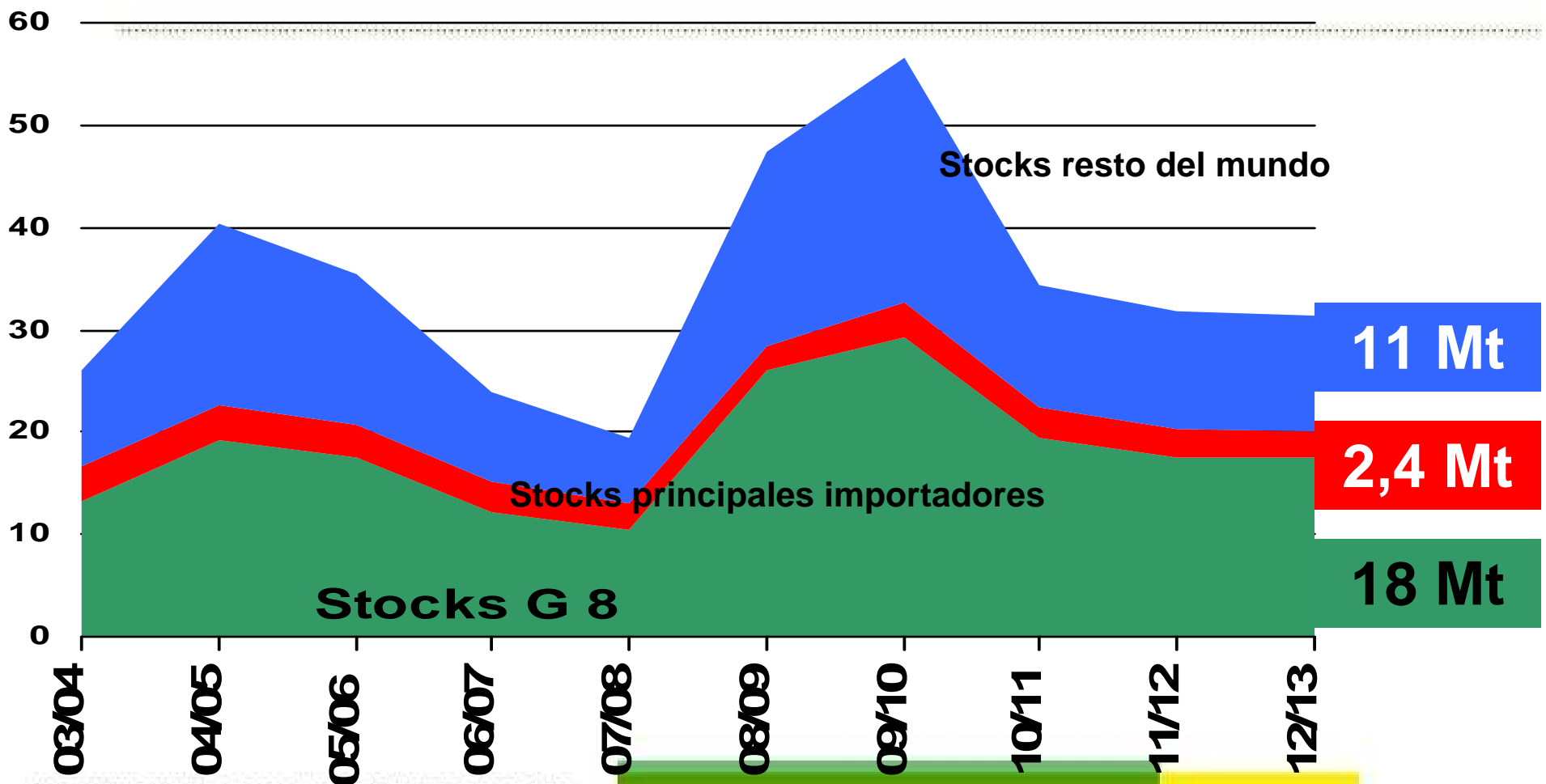
# Balance mundial de cebada 2012/13

Ratio stock sobre consumo

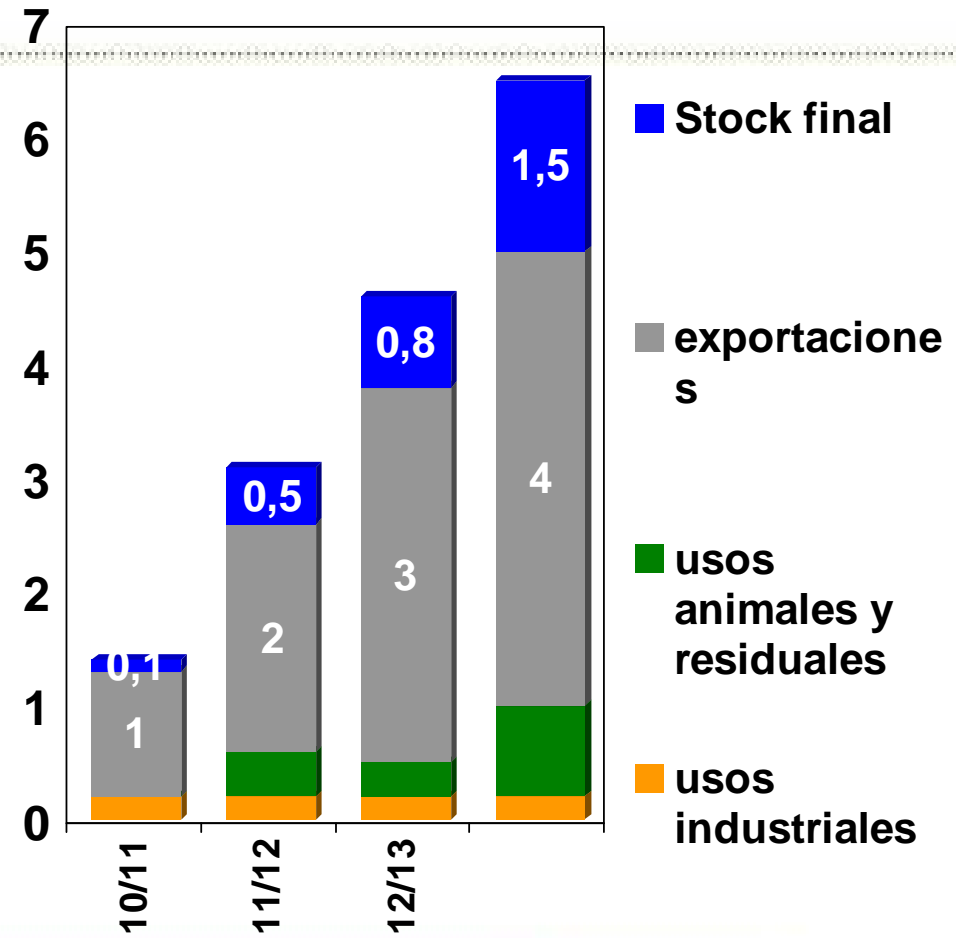
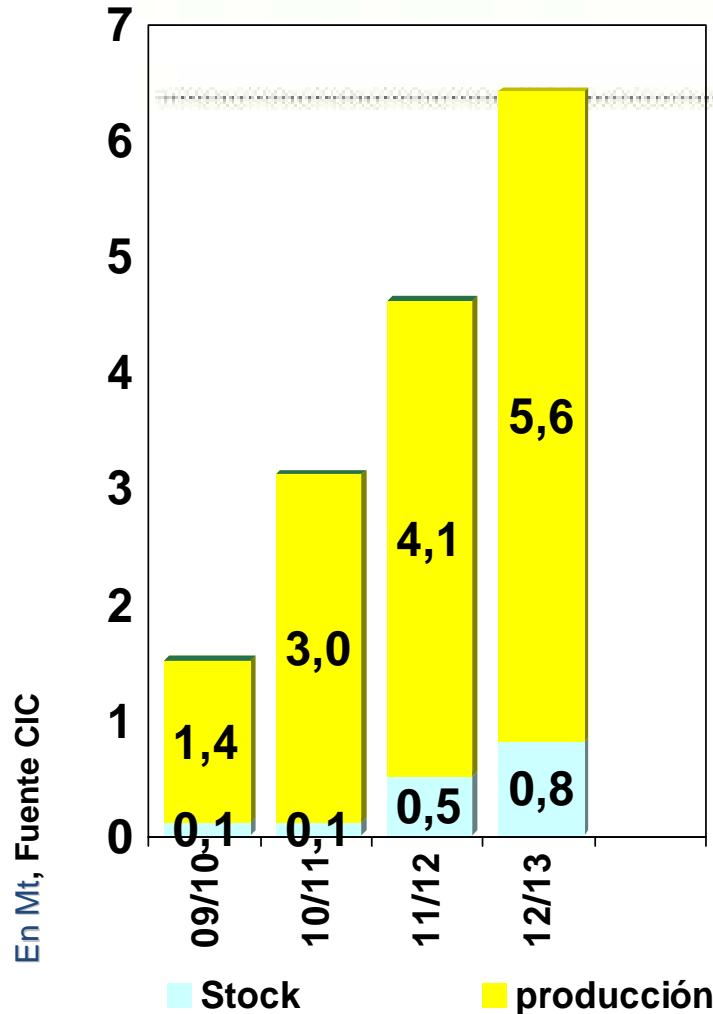


# Reparto de las existencias mundiales de cebada en 2012/13

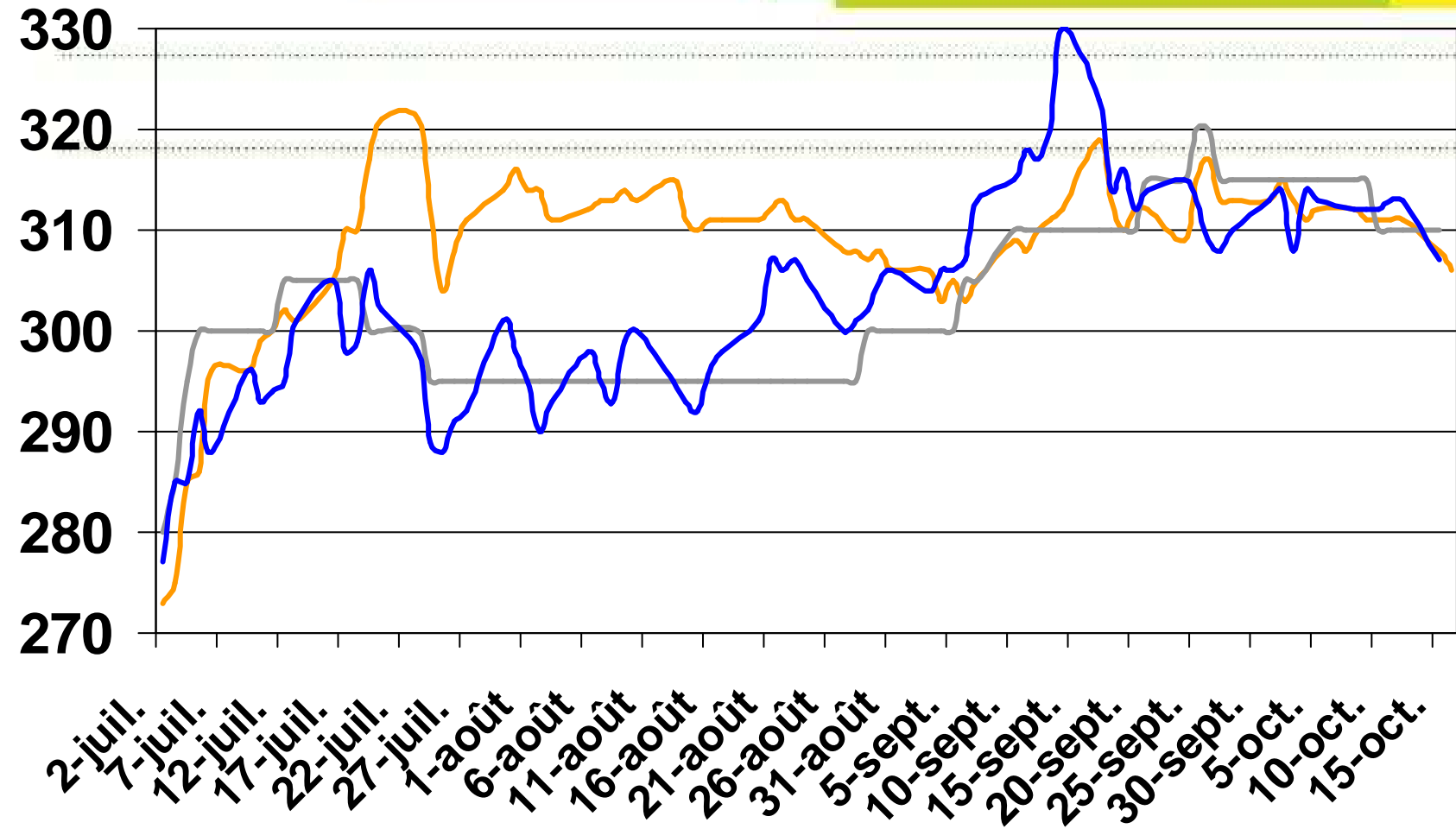
En Mt, Fuente CIC



# Argentina: balance cebada



# Cotización de la cebada



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

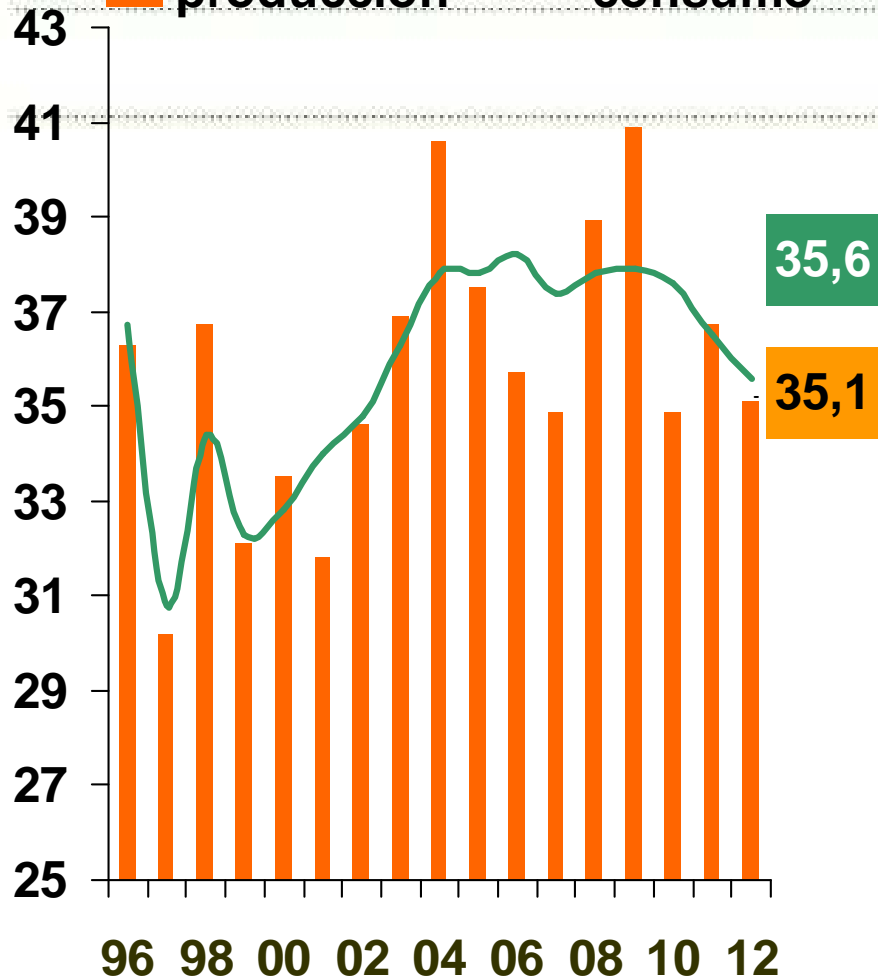


# Balance mundial trigo duro 08/09

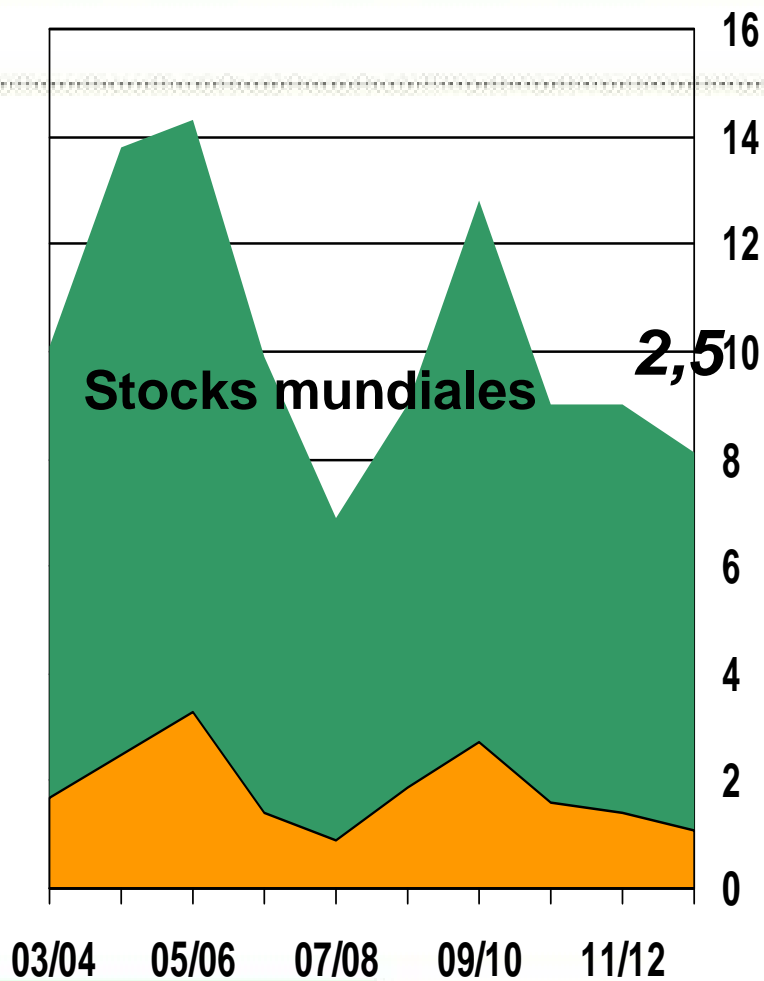
FranceAgriMer

(En Mt) Fuente CIC 28/09/2012

producción consumo



## Stocks mundiales

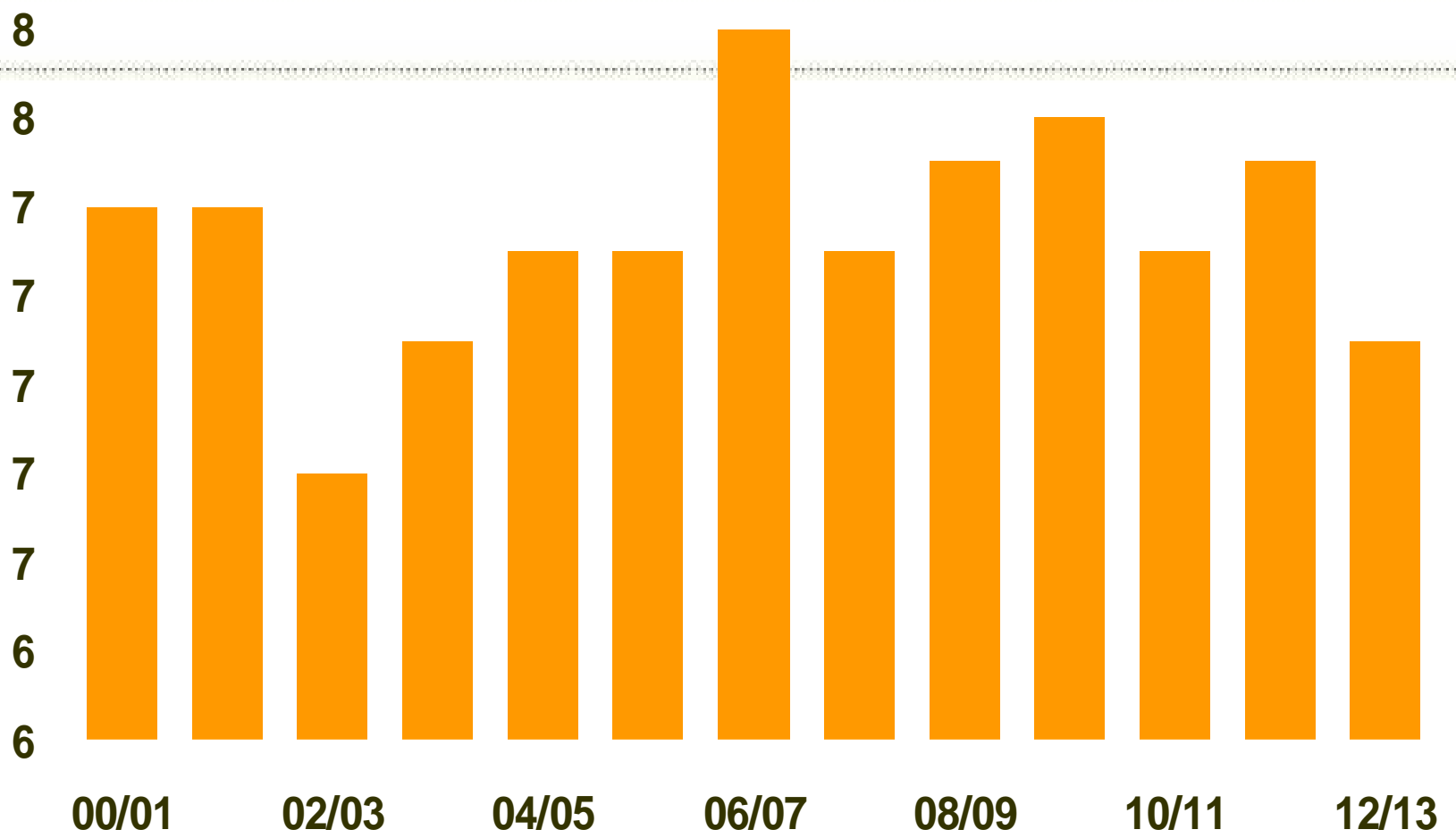




# Comercio mundial del trigo duro

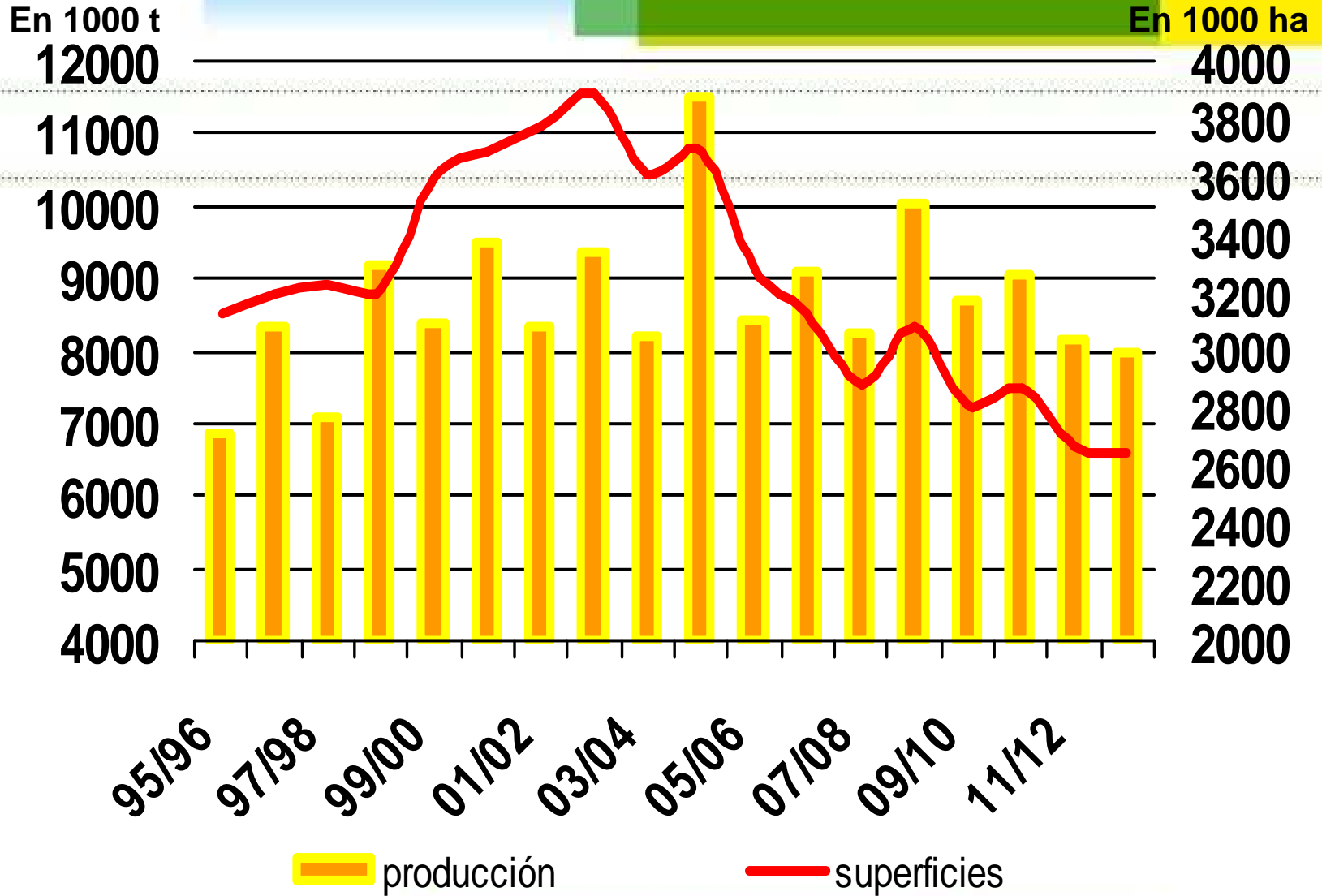
Fuente CIC 28/09/2012

( 1000 t )



# Superficies y producción en la UE

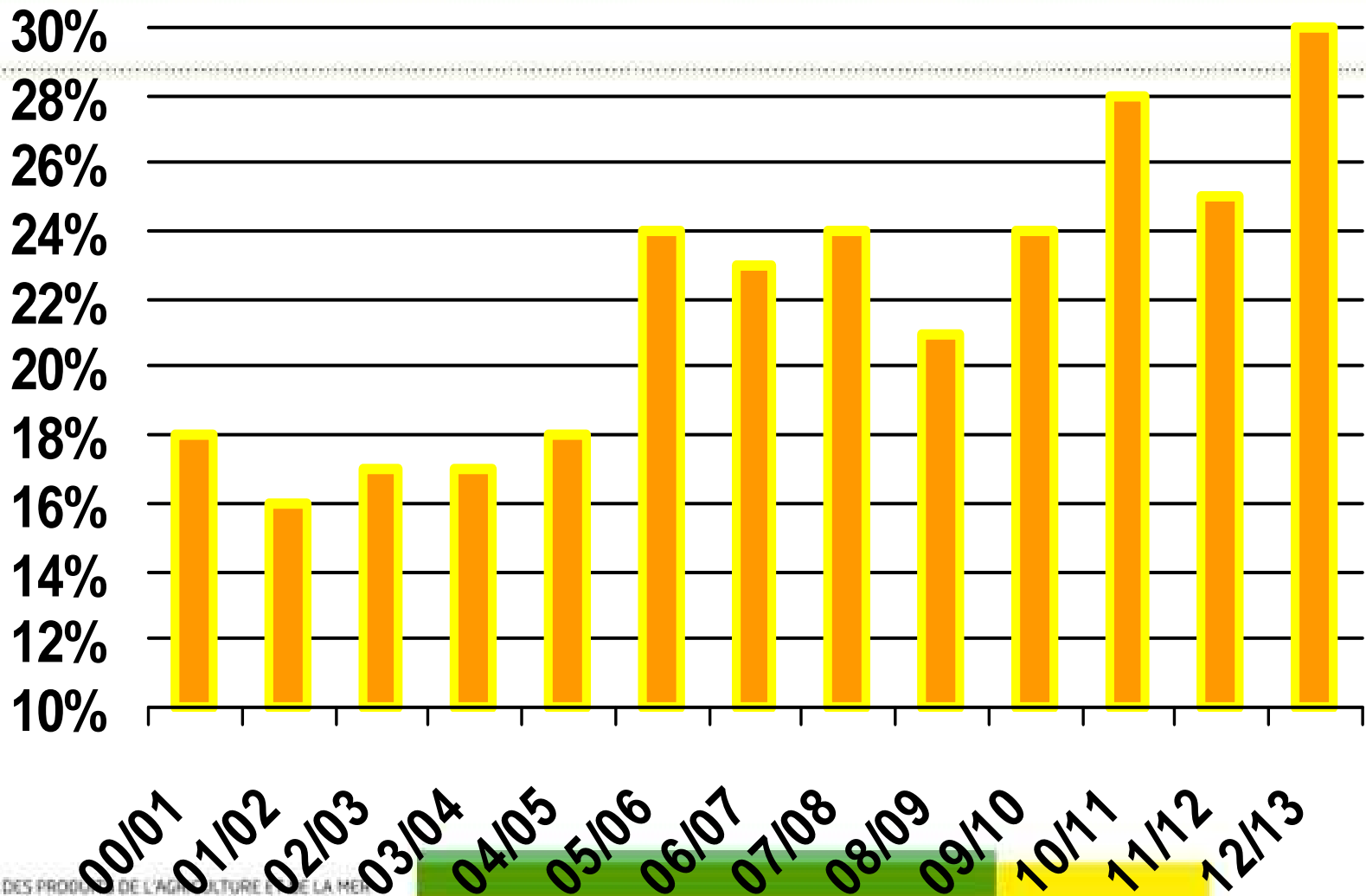
fuelle: CIC y ONIGC





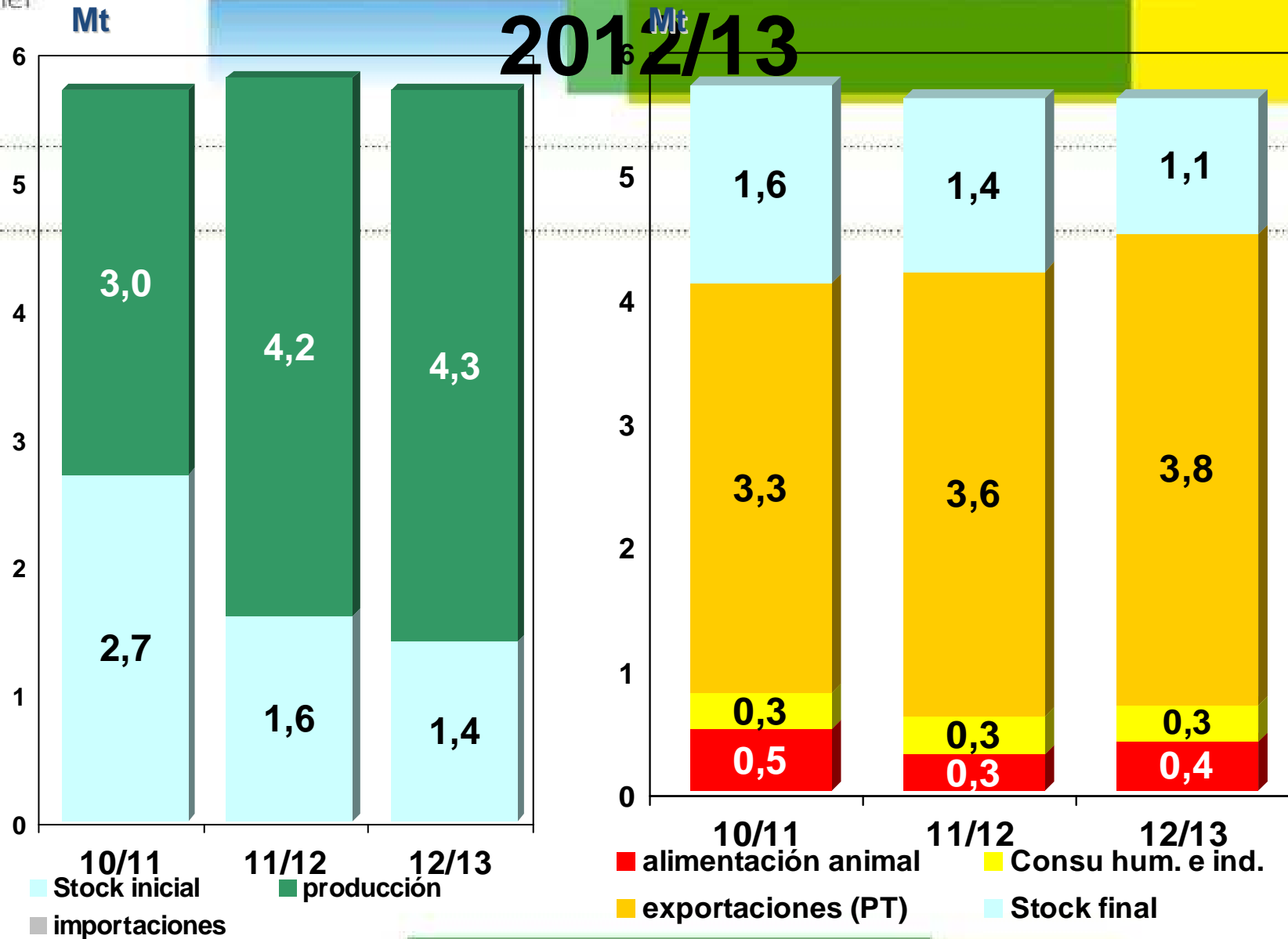
# Parte de Francia en la producción europea

fuelle: CIC y FranceAgriMer



# Canadá: balance trigo duro

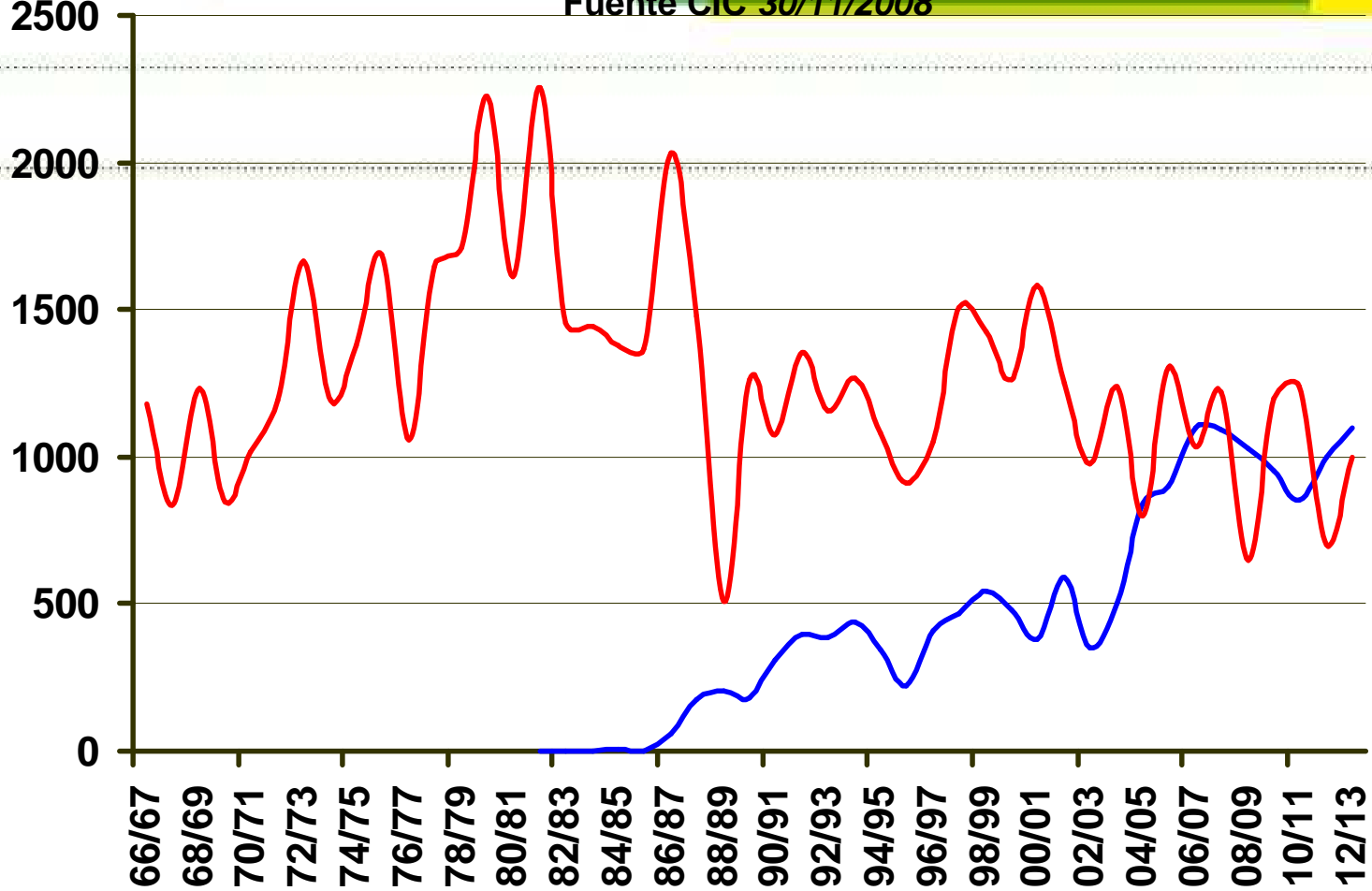
## 2012/13



# Importaciones exportaciones de trigo duro de los Estados Unidos

en 1000 t  
2500

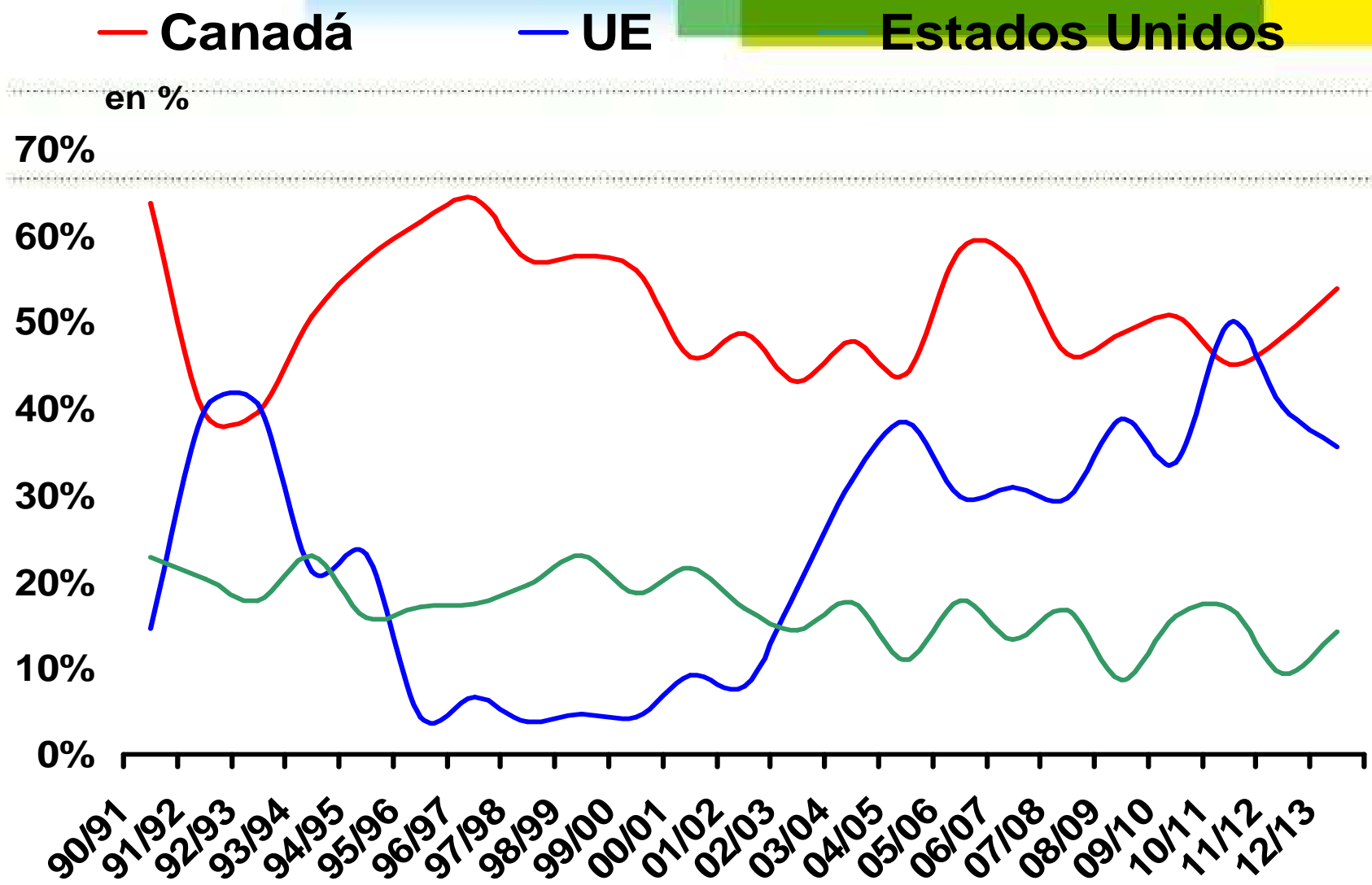
Fuente CIC 30/11/2008



— USA importaciones

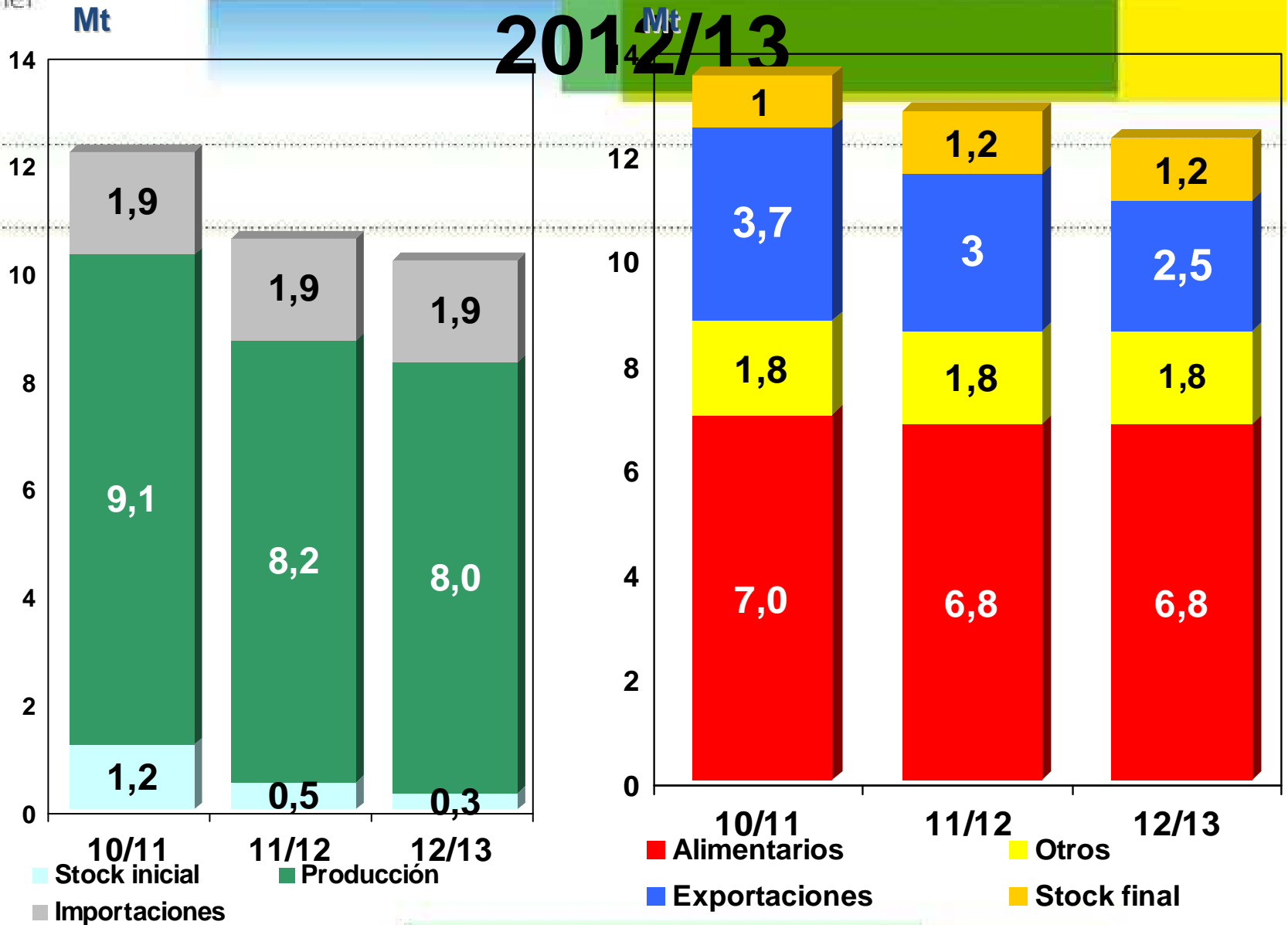
— USA exportaciones

# Cuotas de mercado



# UE 27: balance trigo duro

2012/13





FranceAgriMer

## Necesidades de los países mediterráneos y europeos de trigo duro 2012/13 (en Mt)

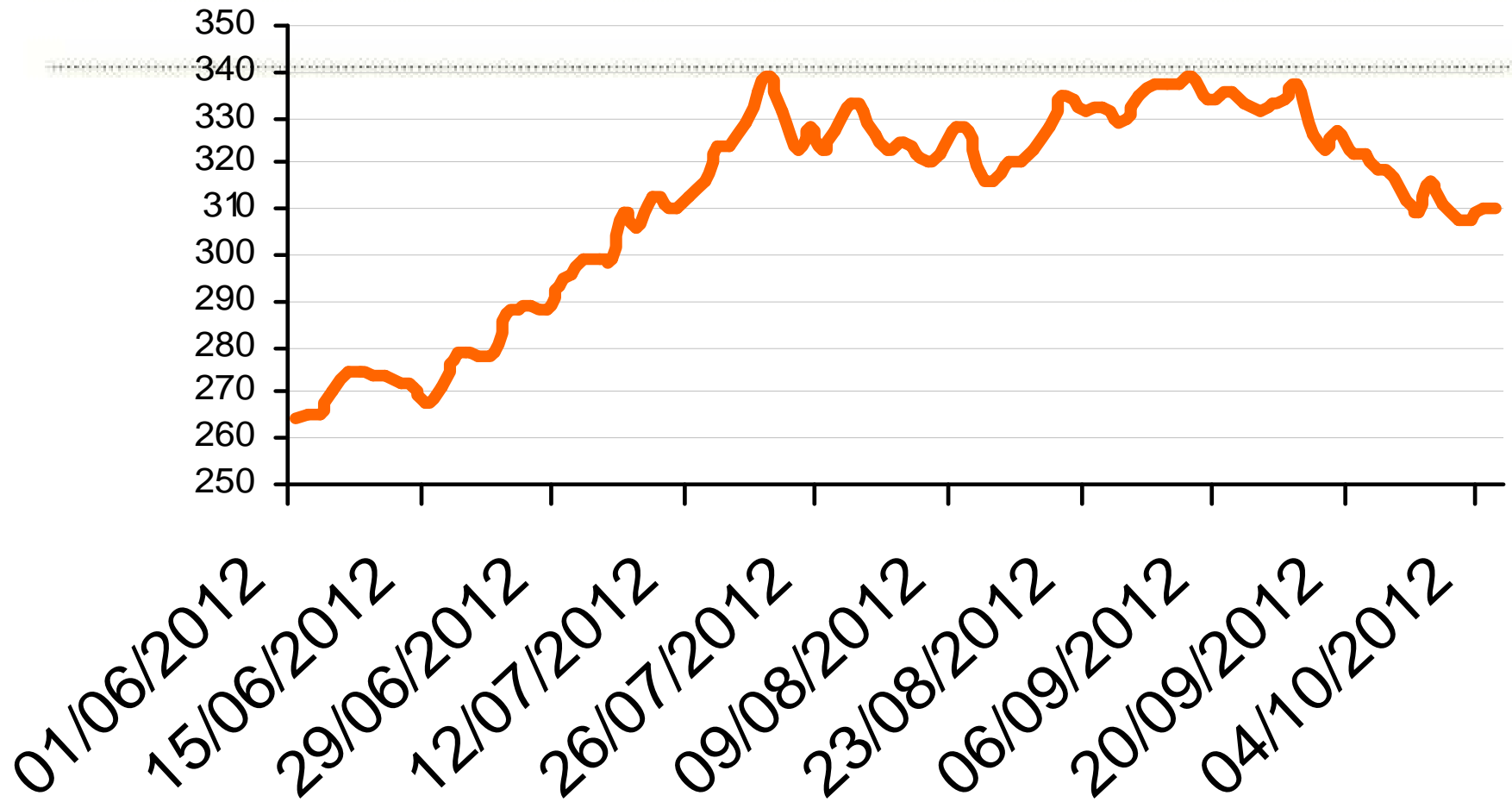
En Mt, fuente CIC y FranceAgriMer

	2011/12	2012/13	2012/13 Bis
<b>UE</b>	<b>1,8</b>	<b>1,9</b>	<b>1,9</b>
<b>Argelia</b>	<b>1,8</b>	<b>1,3</b>	<b><u>1,5</u></b>
<b>Marruecos</b>	<b>0,7</b>	<b>0,9</b>	<b>0,9</b>
<b>Túnez</b>	<b>0,5</b>	<b>0,5</b>	<b>0,5</b>
<b>Total</b>	<b>4,8</b>	<b>4,6</b>	<b>4,8</b>



# Índice CIC - GOI (Grains and Oilseeds Index)

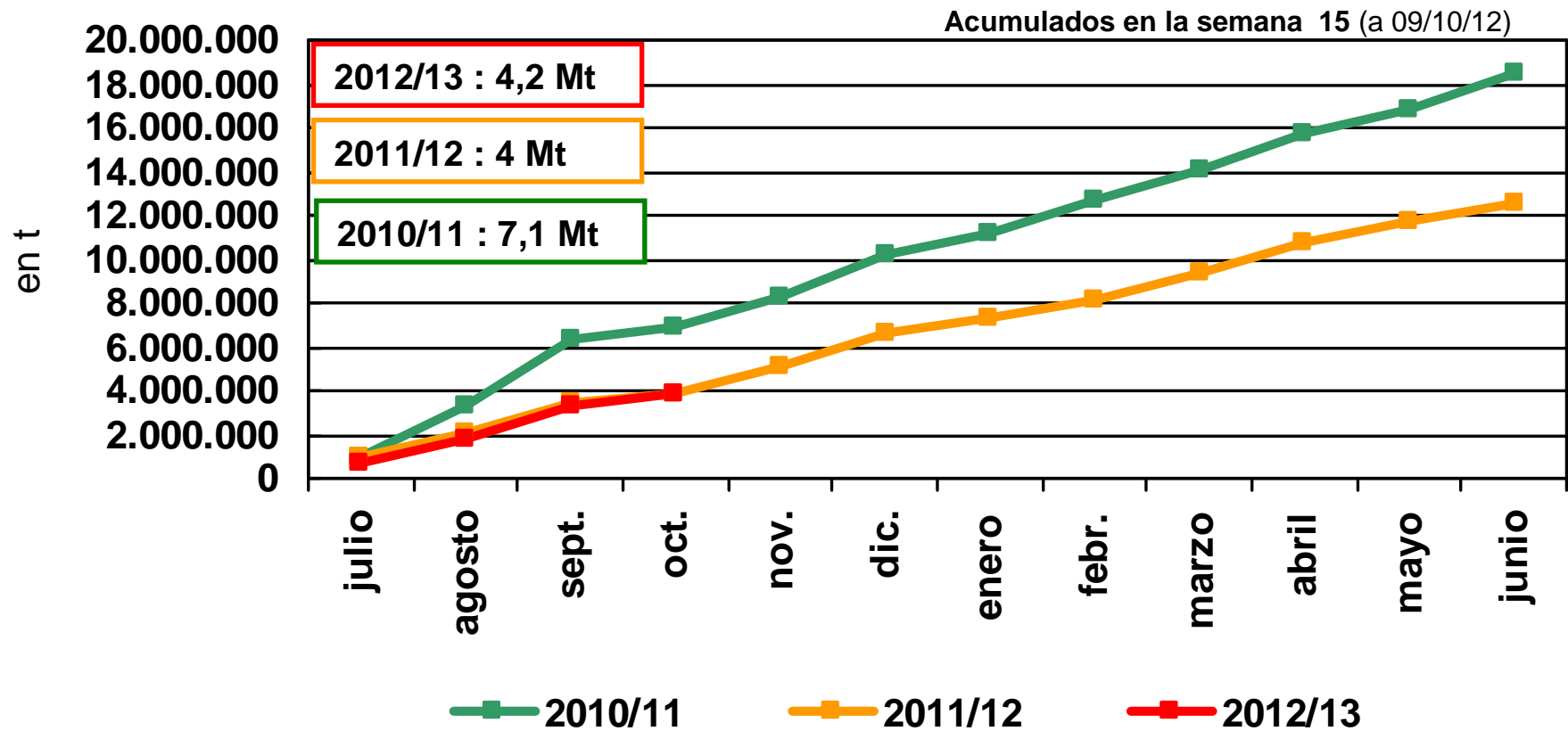
fuente: CIC-indice 100 enero 2000





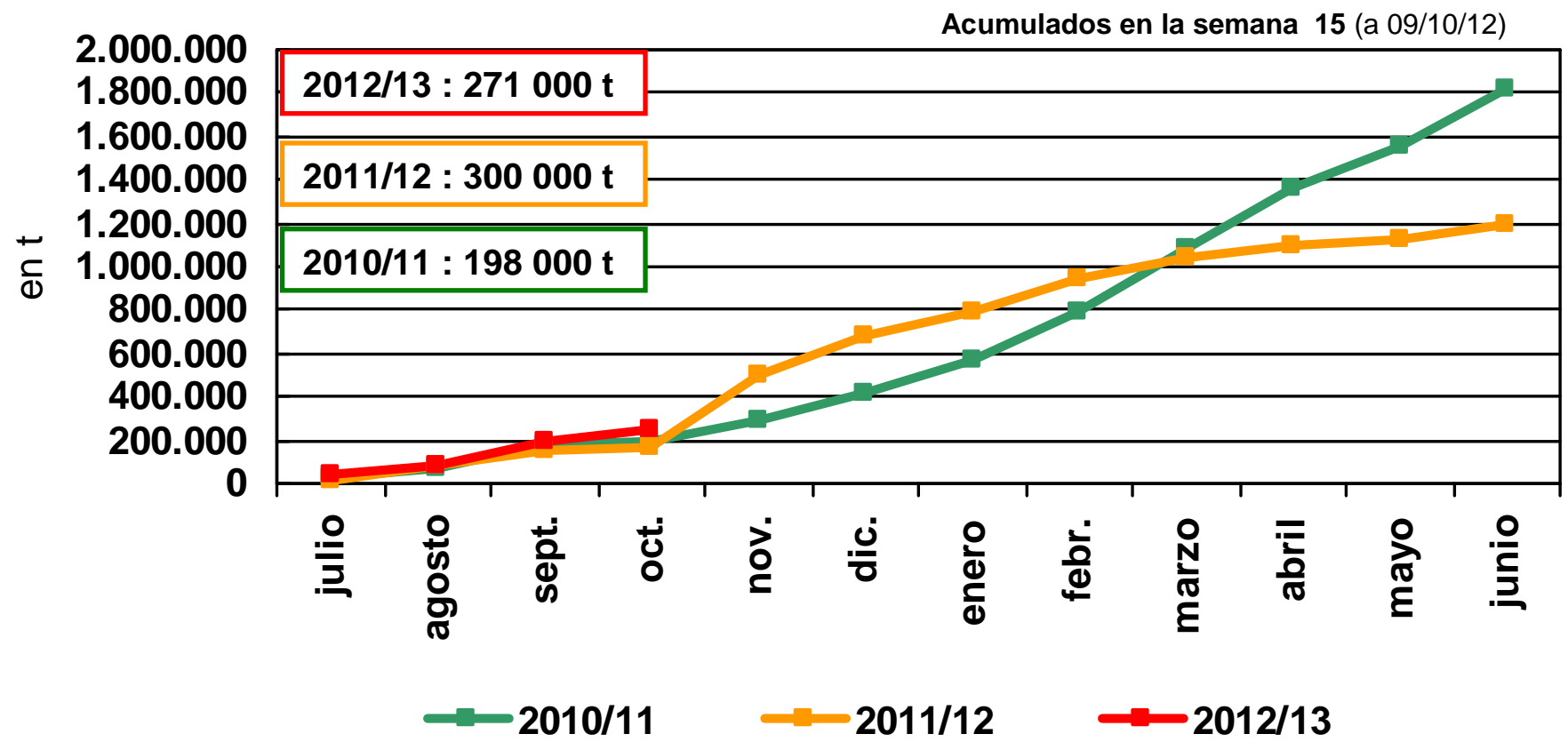
# Mercado europeo

## Trigo blando: certificados para la exportación expedidos en la UE



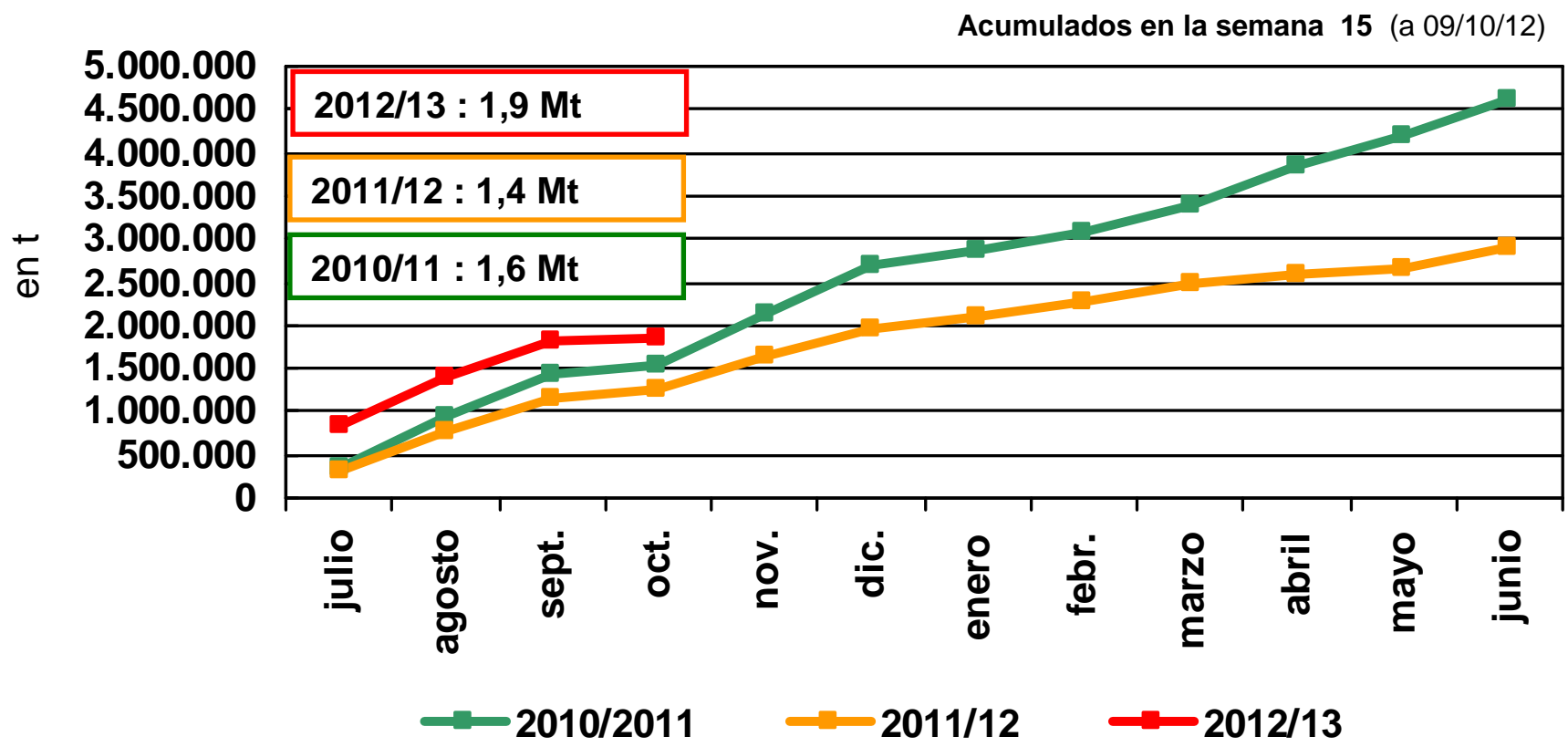
fuelle: Comisión europea

## Trigo duro: certificados para la exportación expedidos en la UE



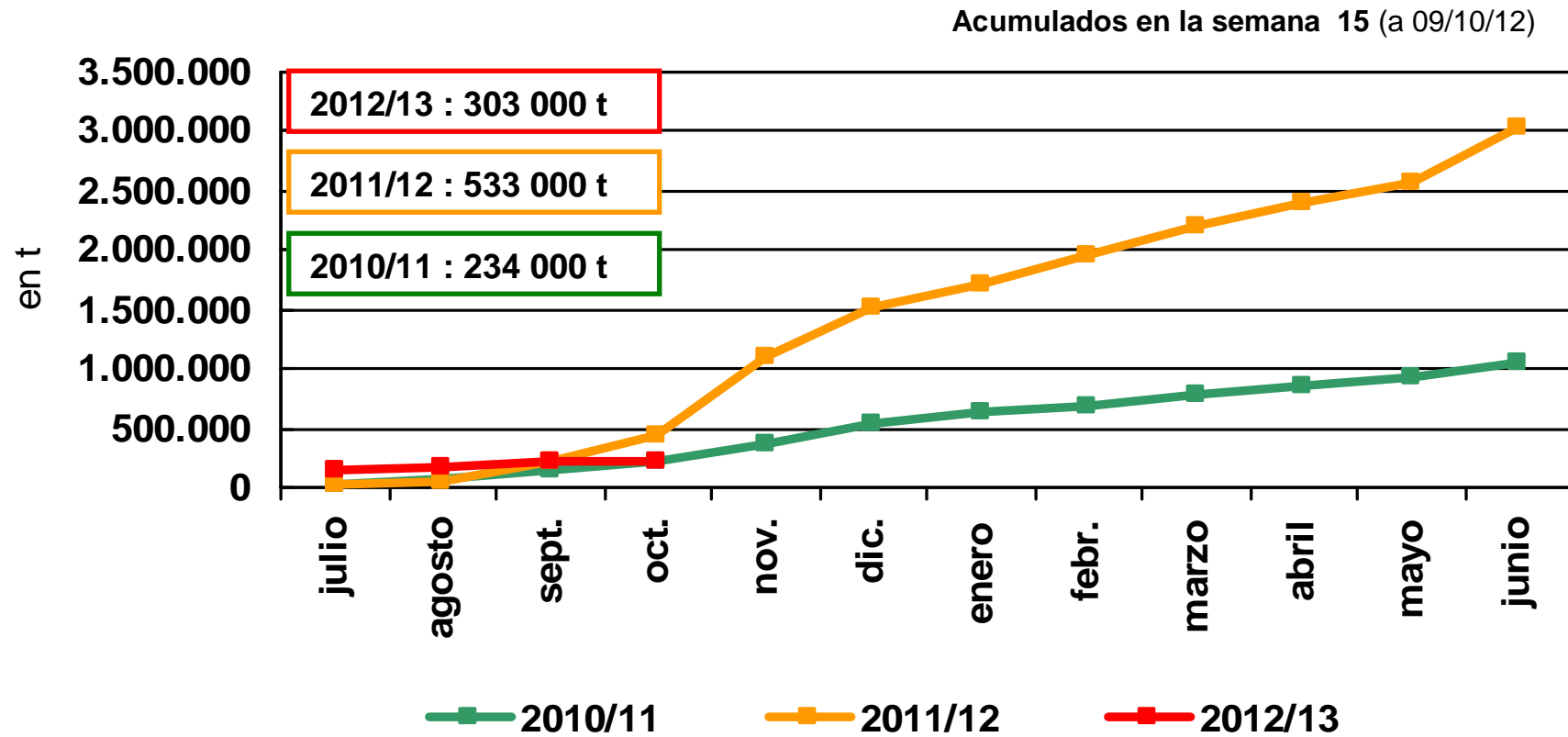
fuelle: Comisión europea

# Cebada: certificados para la exportación expedidos en la UE



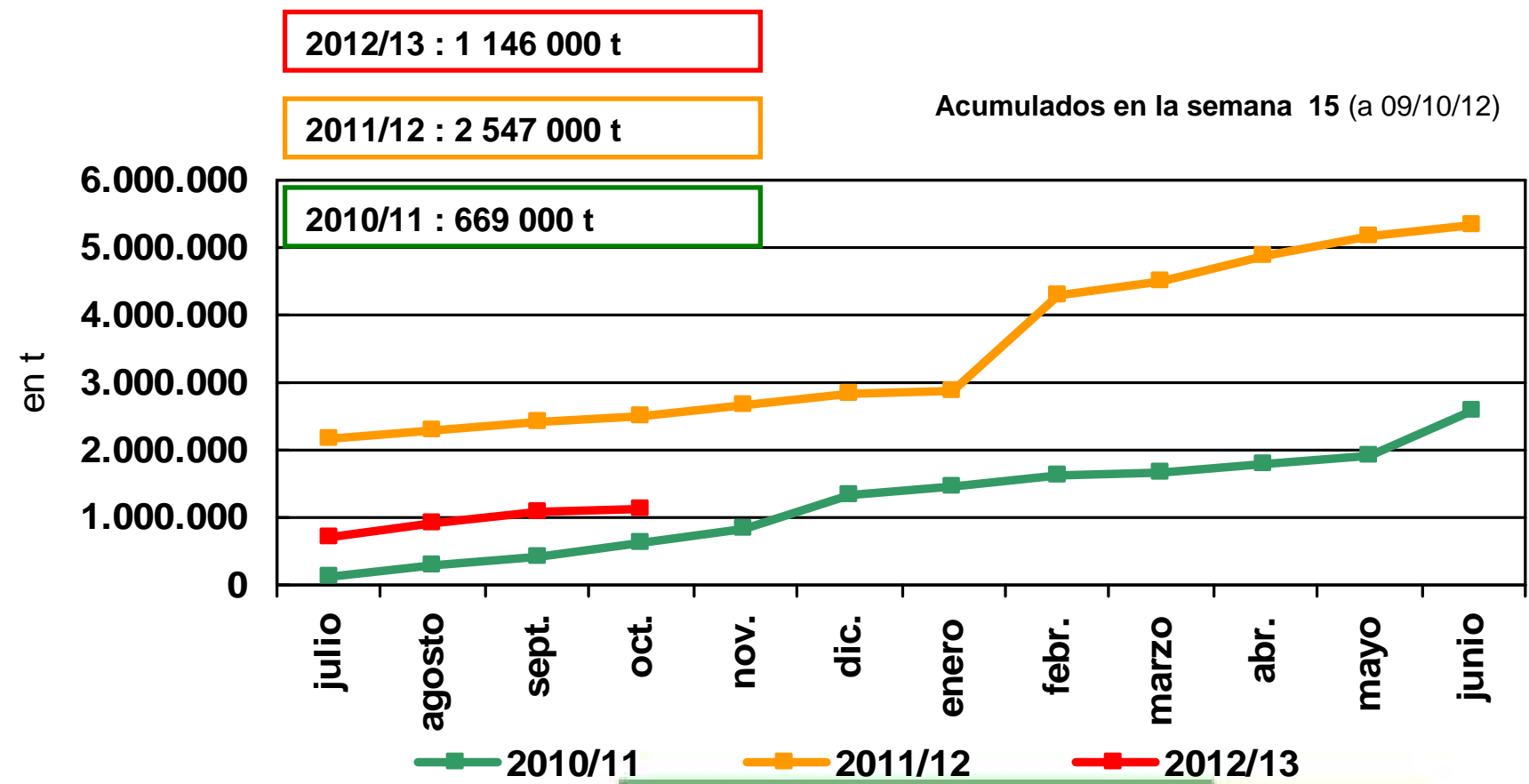
fuelle: Comisión europea

## Maíz: certificados para la exportación expedidos en la UE

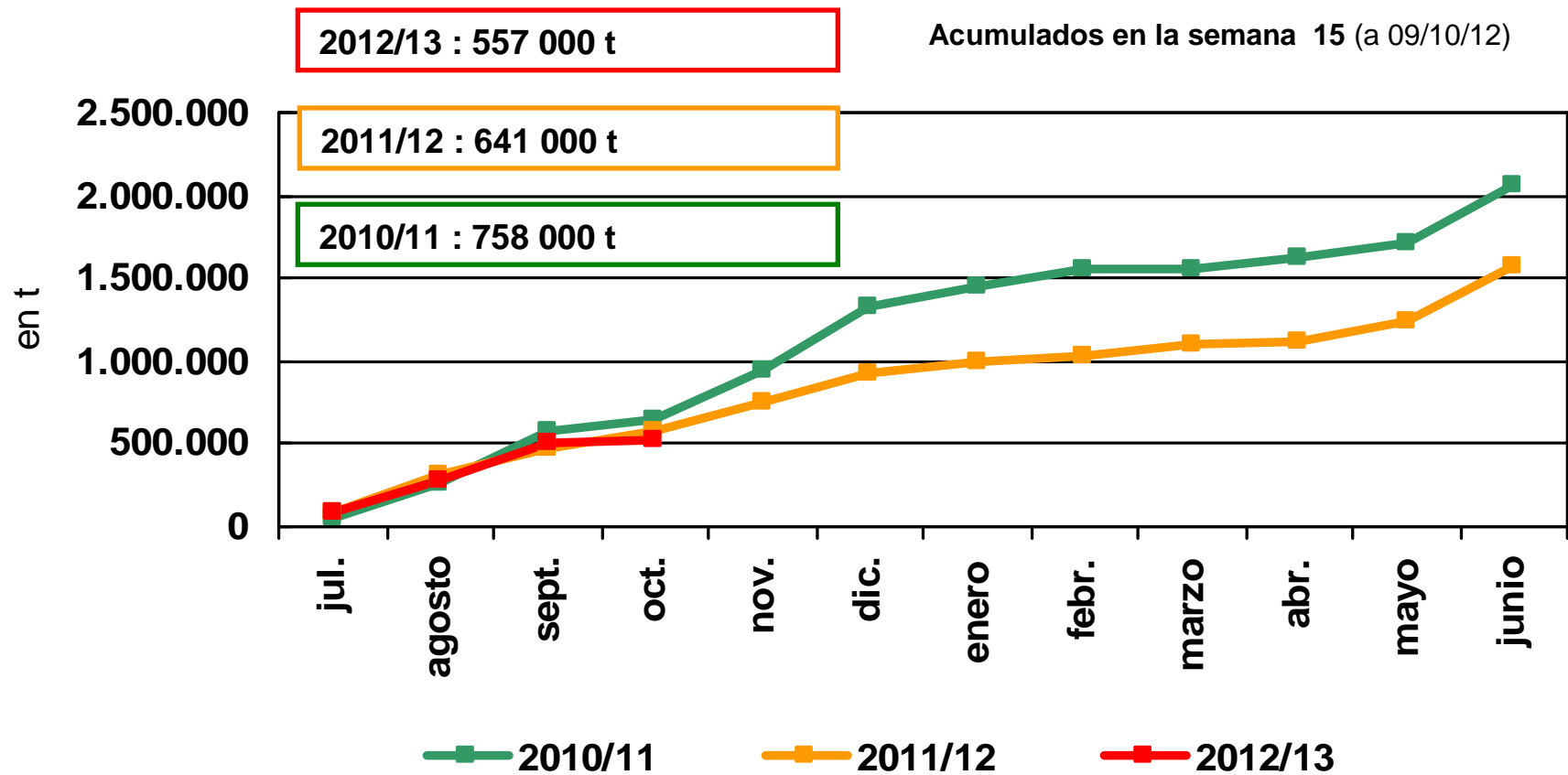


fuelle: Comisión europea

## Trigo blando: certificados para la importación expedidos en la UE

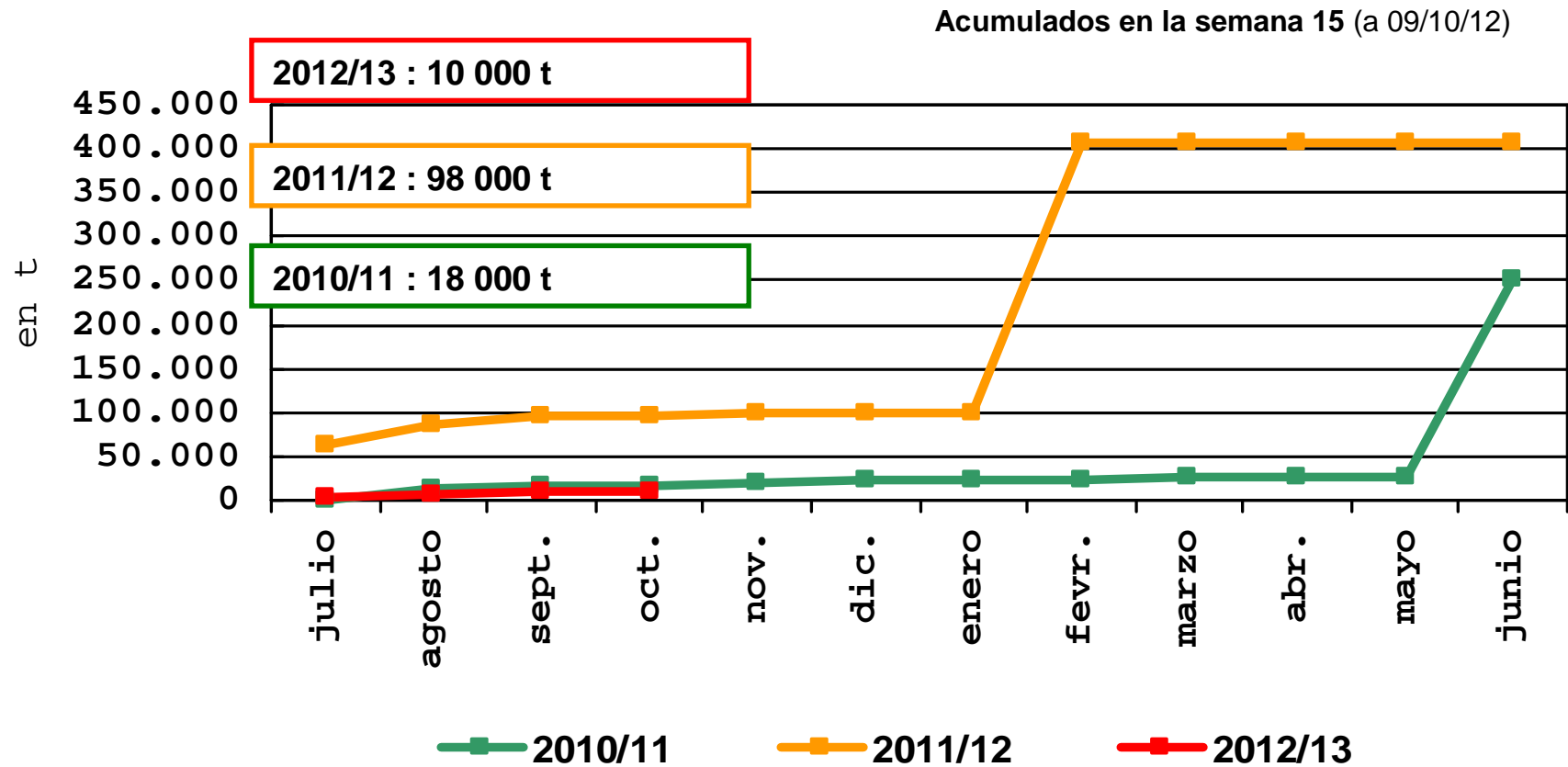


## Trigo duro: certificados para la importación expedidos en la UE

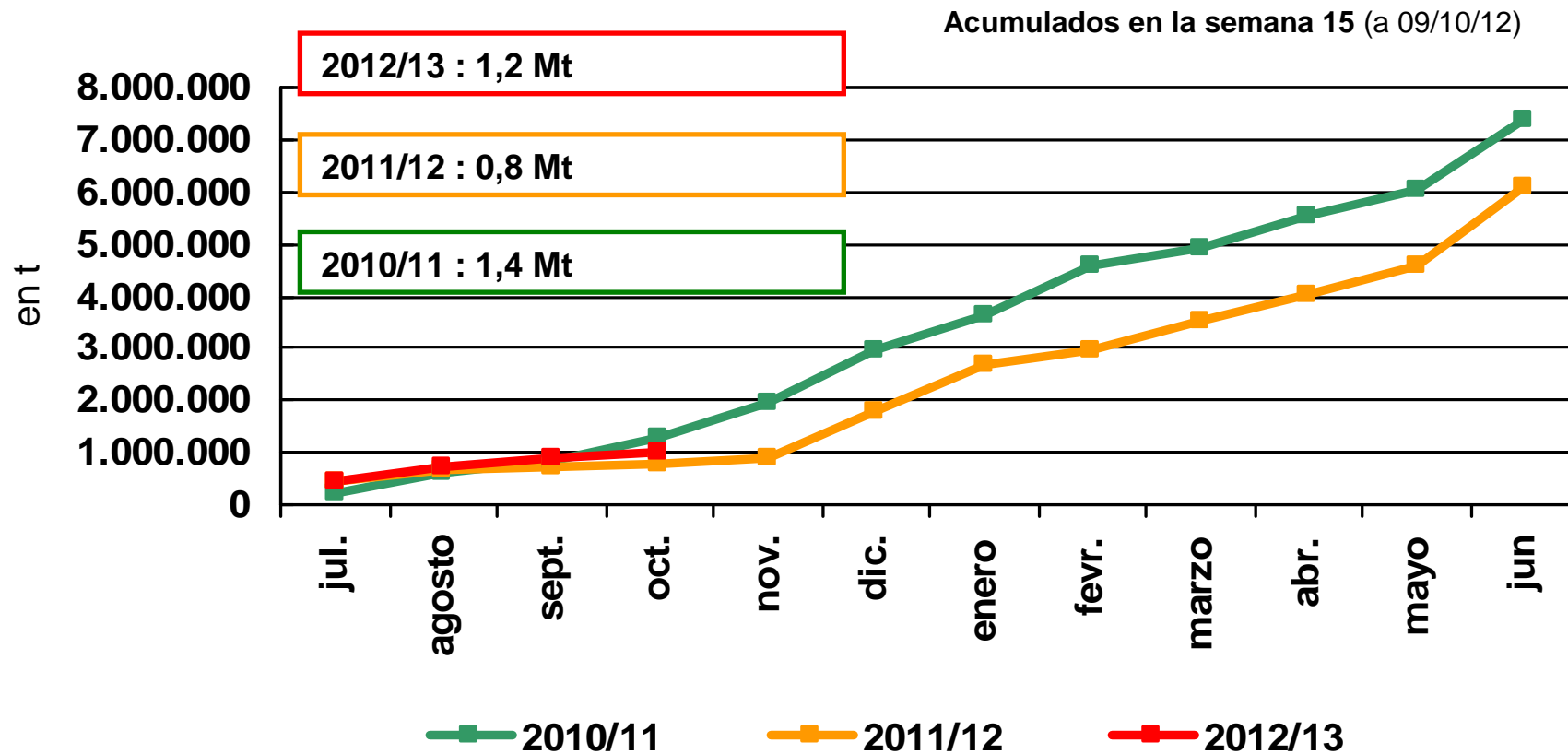




## Cebada: certificados para la importación expedidos en la UE



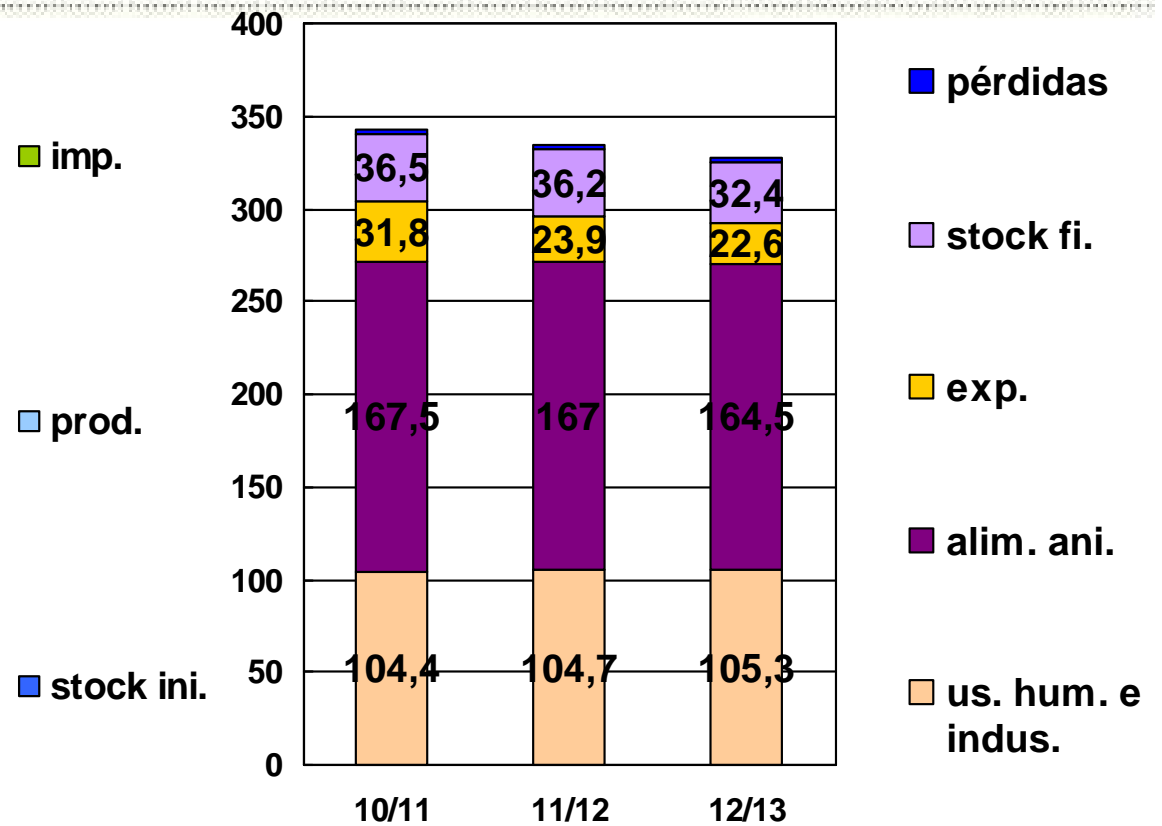
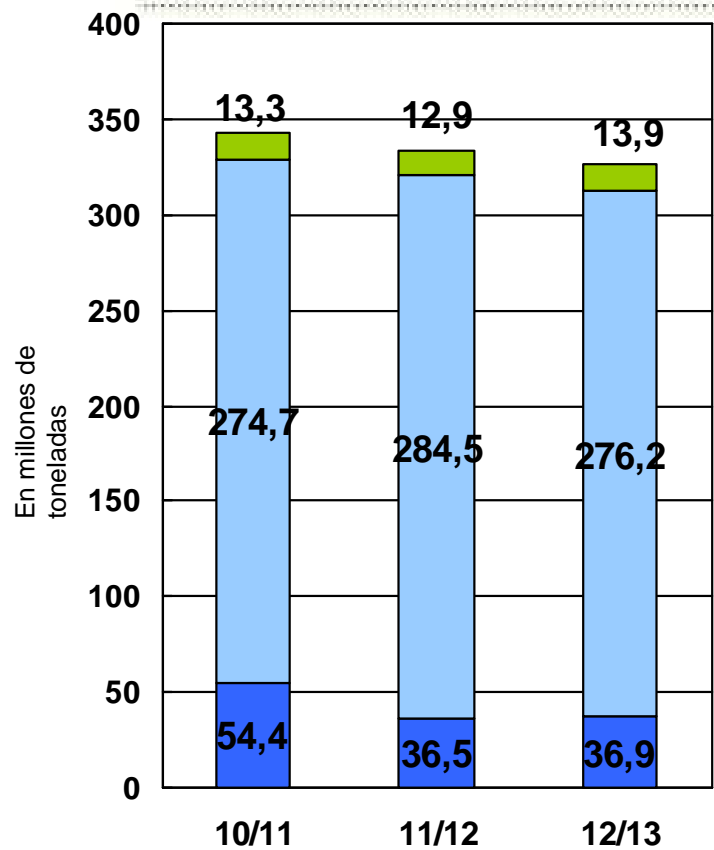
## Maíz: certificados para la importación expedidos en la UE



# UE - balance de todos los cereales

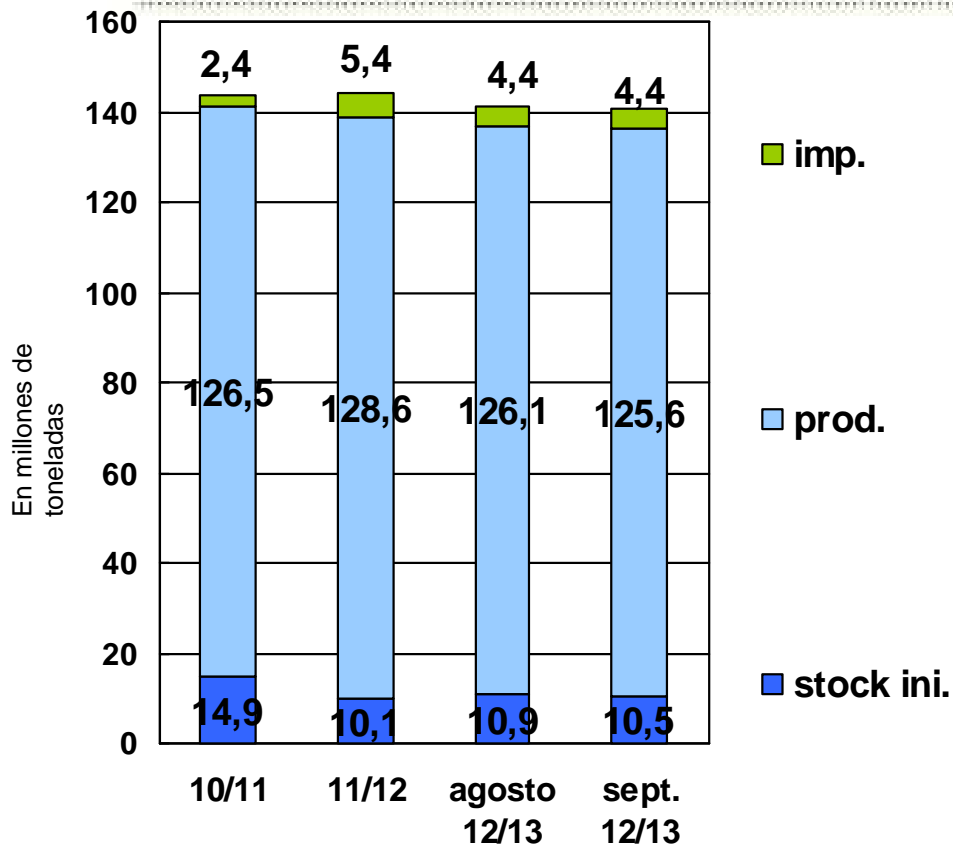
Total disponibilidad 2012/13 : 327 Mt

Total usos 2012/13: 327 Mt

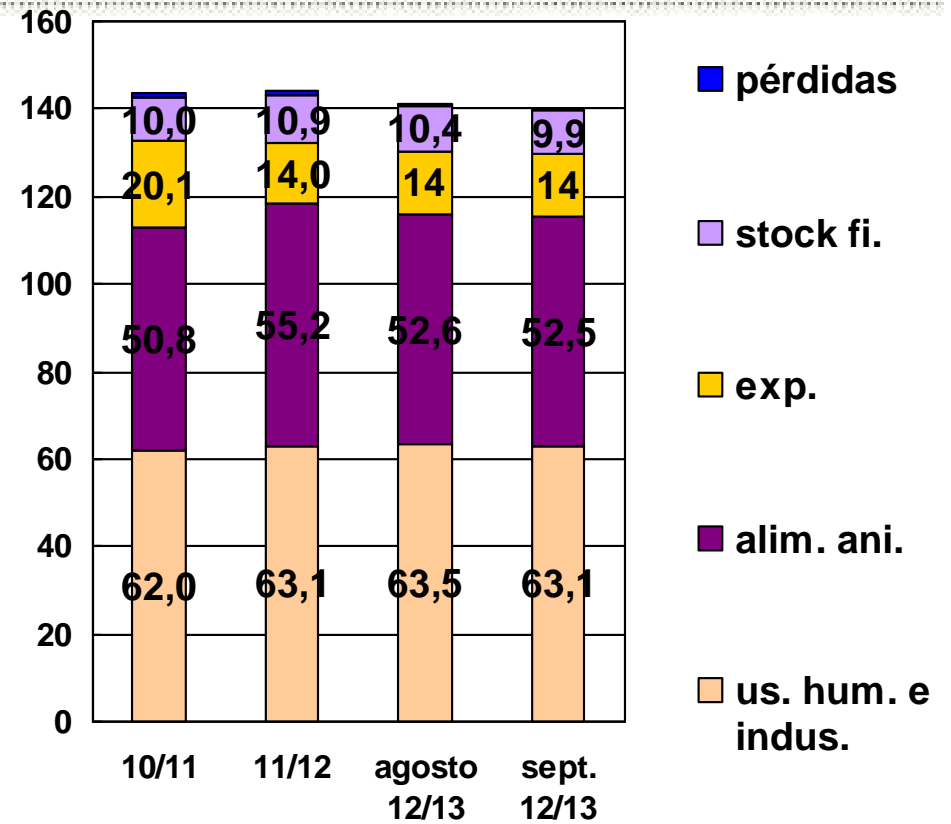


# UE - Balance Trigo blando

Total disponibilidad 2012/13 : 140,5 Mt

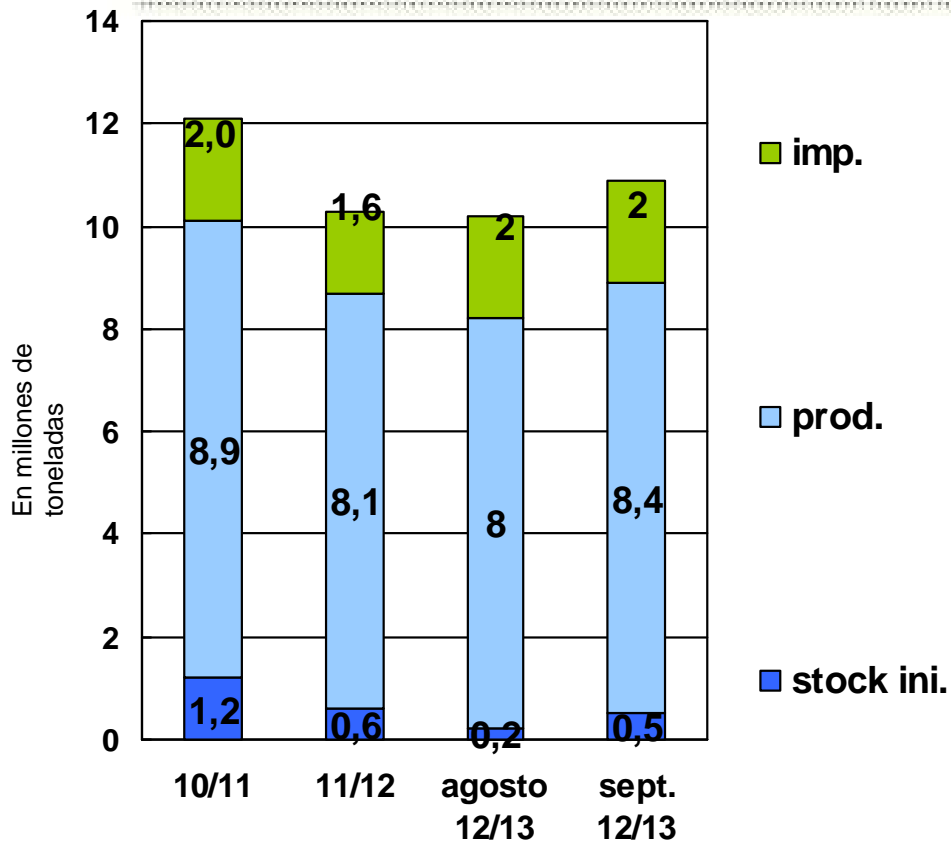


Total usos 2012/13: 140,5 Mt

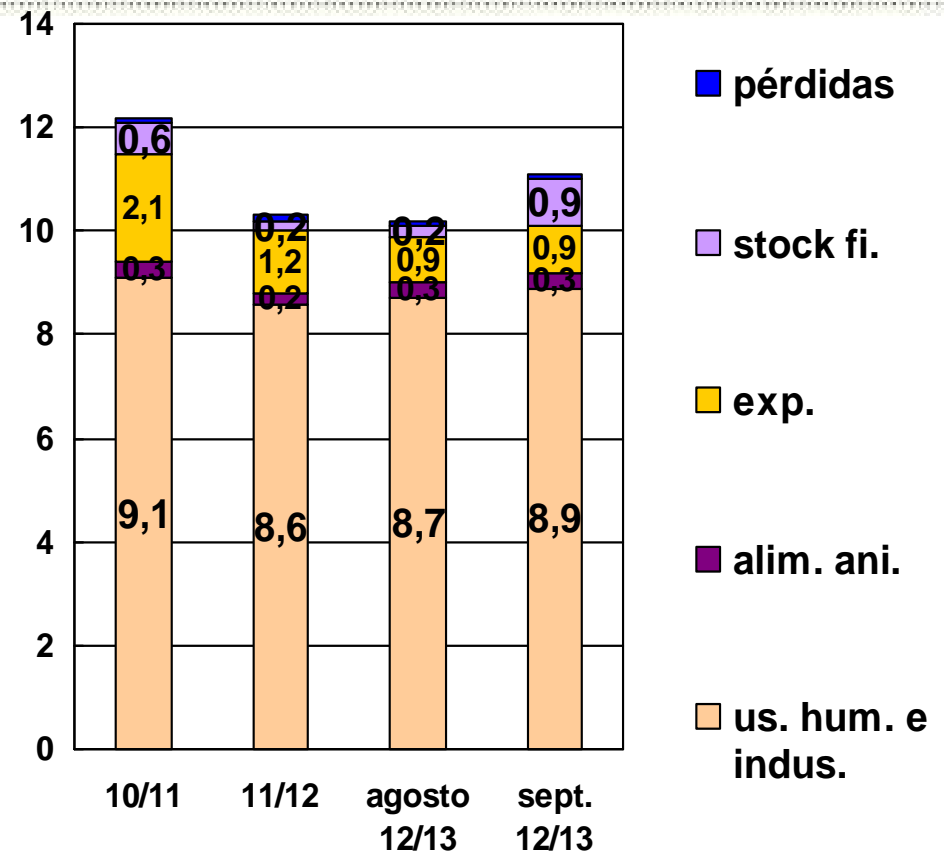


# UE - balance trigo duro

Total disponibilidad 2012/13 : 11 Mt

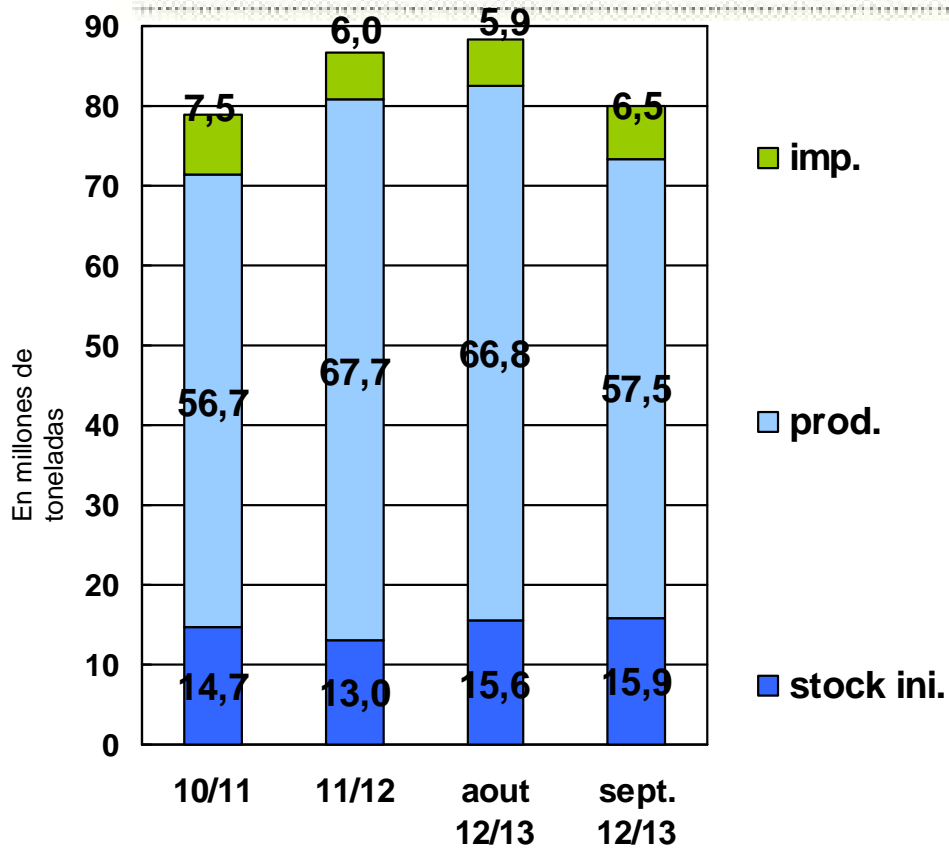


Total usos 2012/13 : 11 Mt

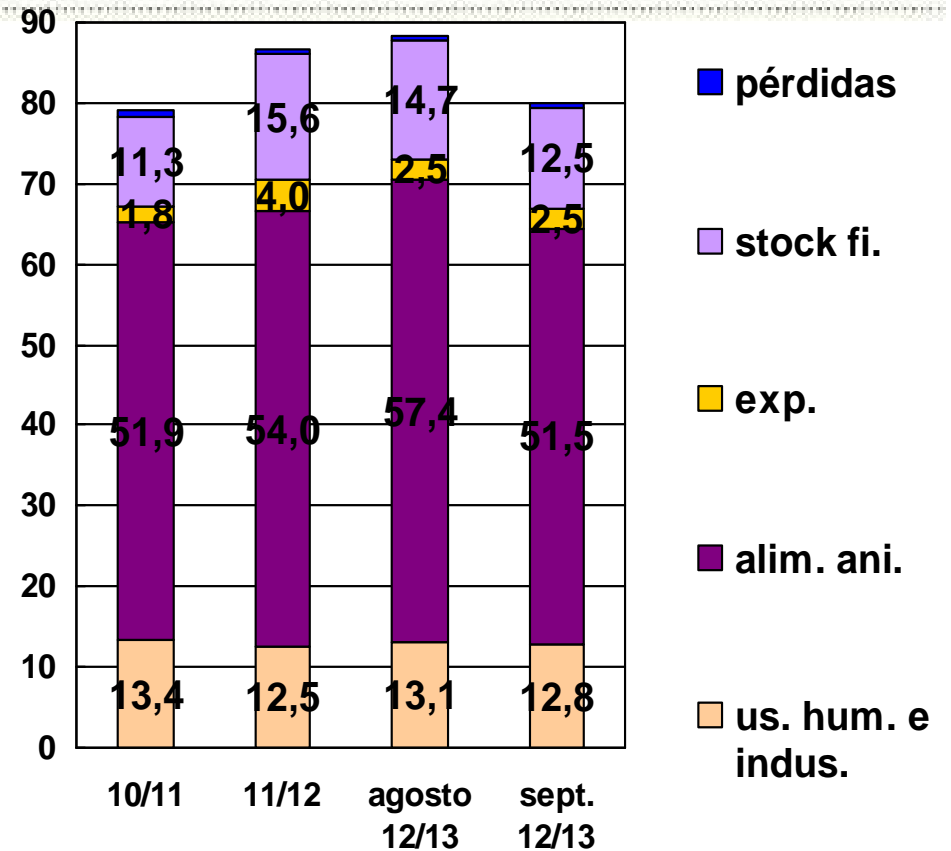


# UE - balance maíz

Total disponibilidad 2012/13 : 79,9 Mt

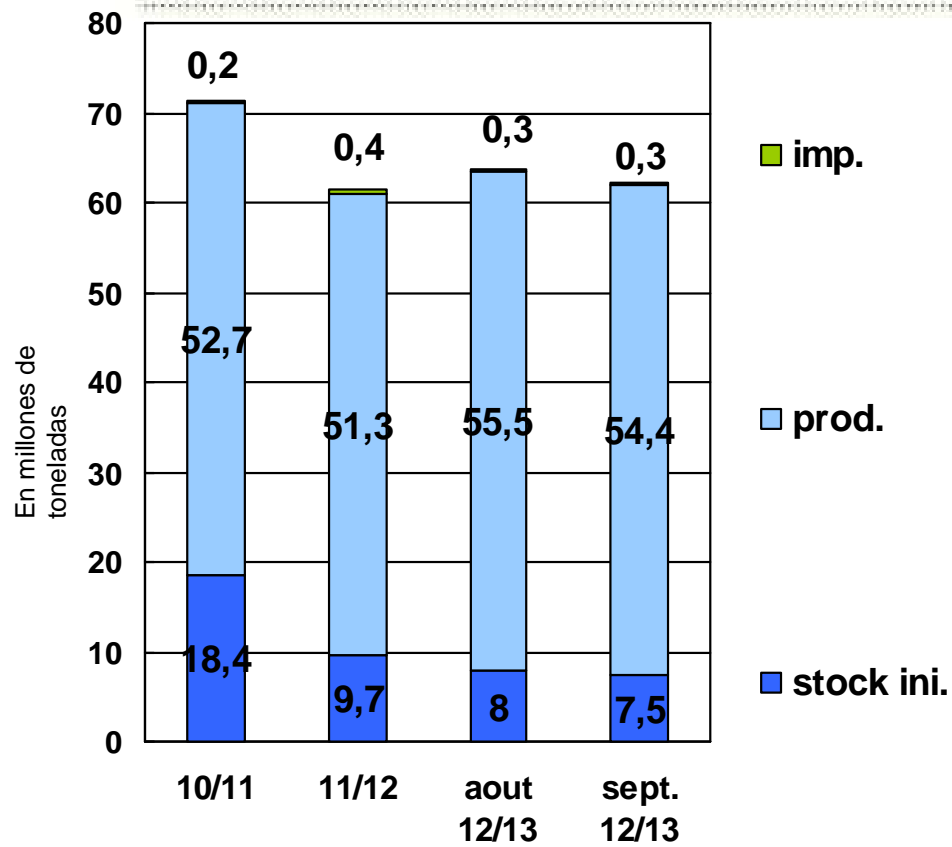


Total usos 2012/13: 79,9 Mt

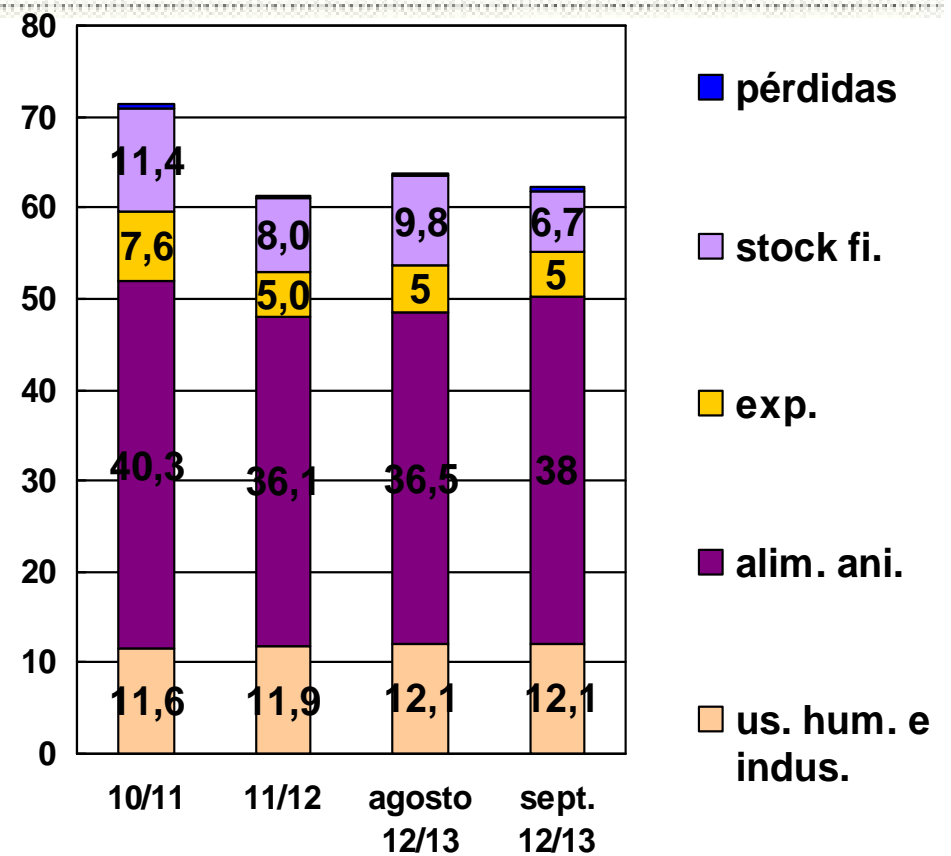


# UE - balance cebada

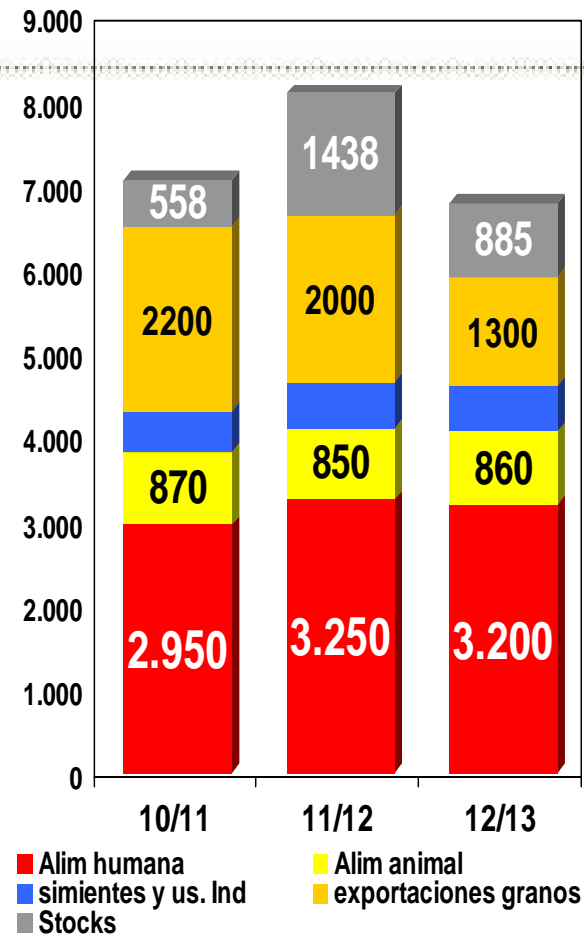
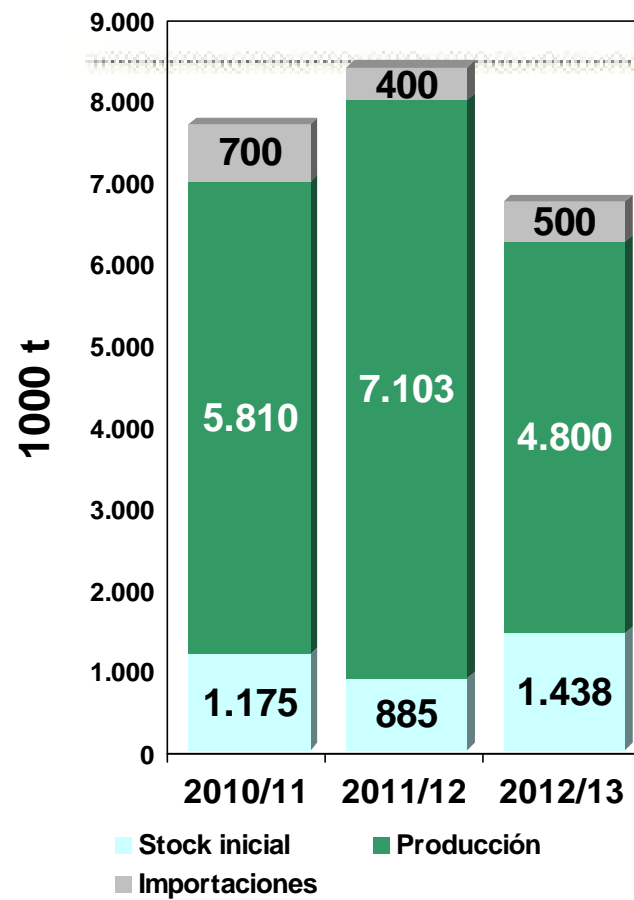
Total disponibilidad 2012/13 : 62,1 Mt



Total usos 2012/13: 62,1 Mt

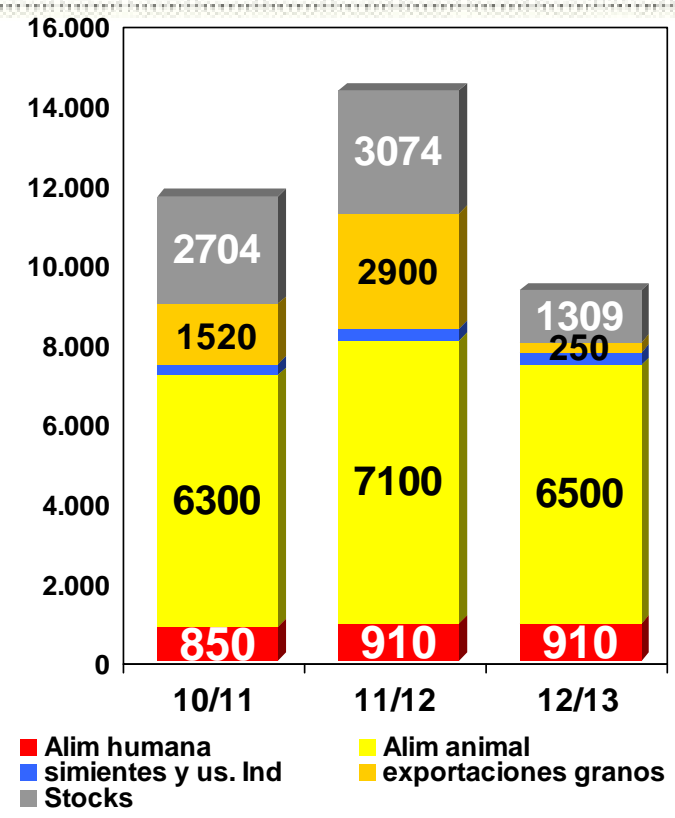
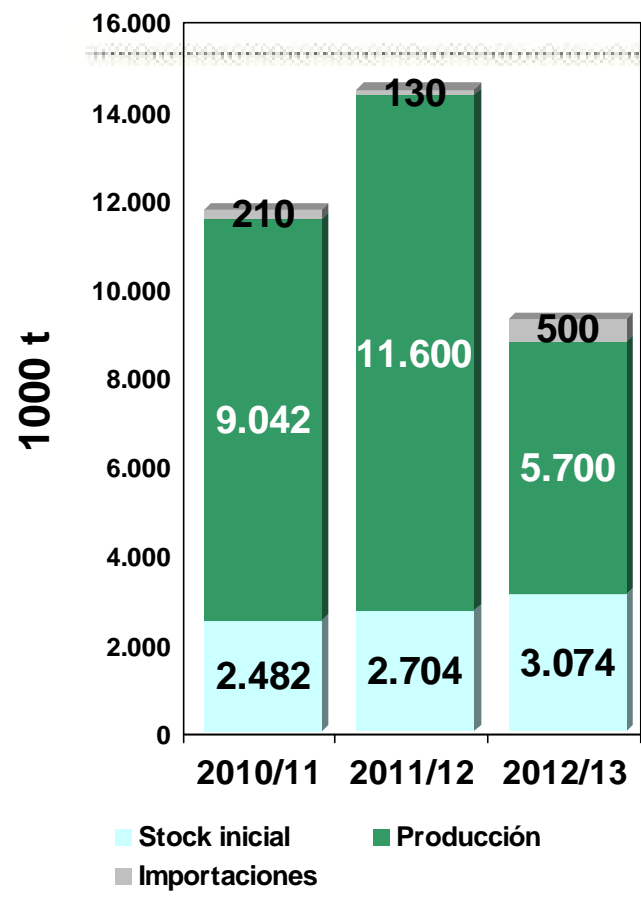


## RUMANÍA: Balance Trigo blando

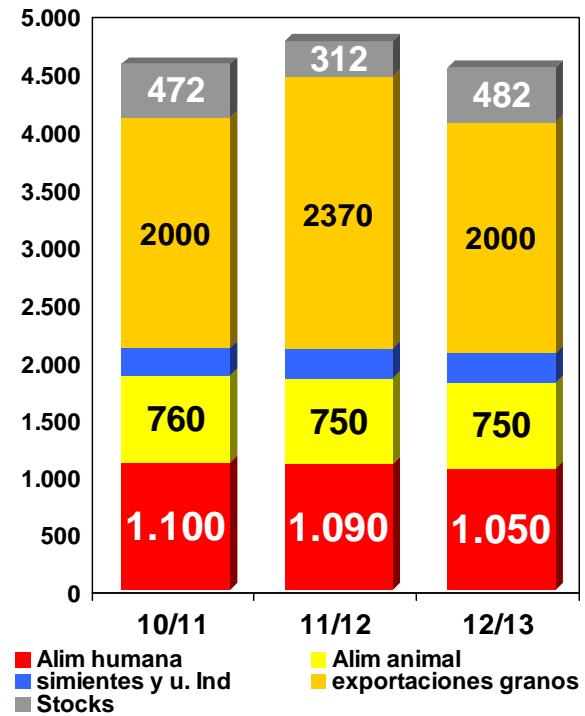
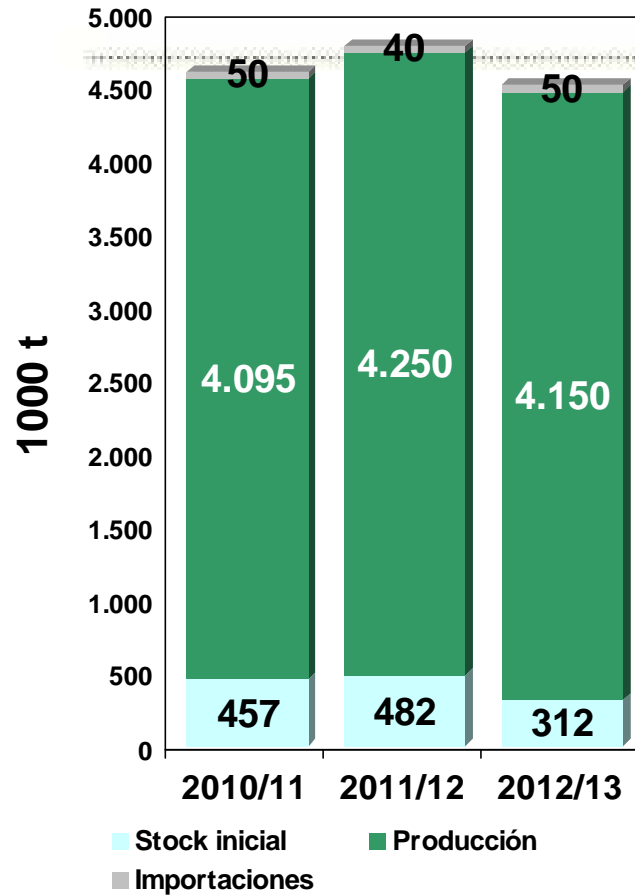




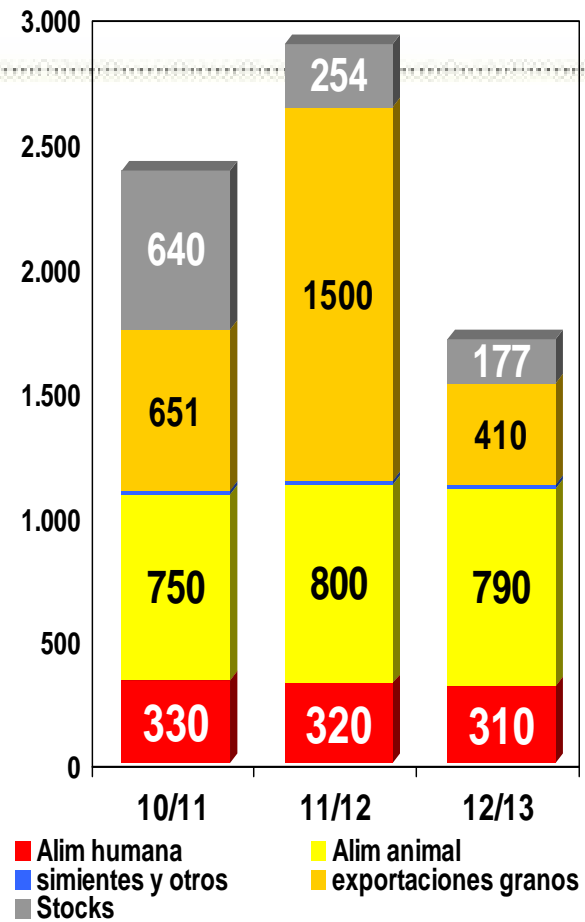
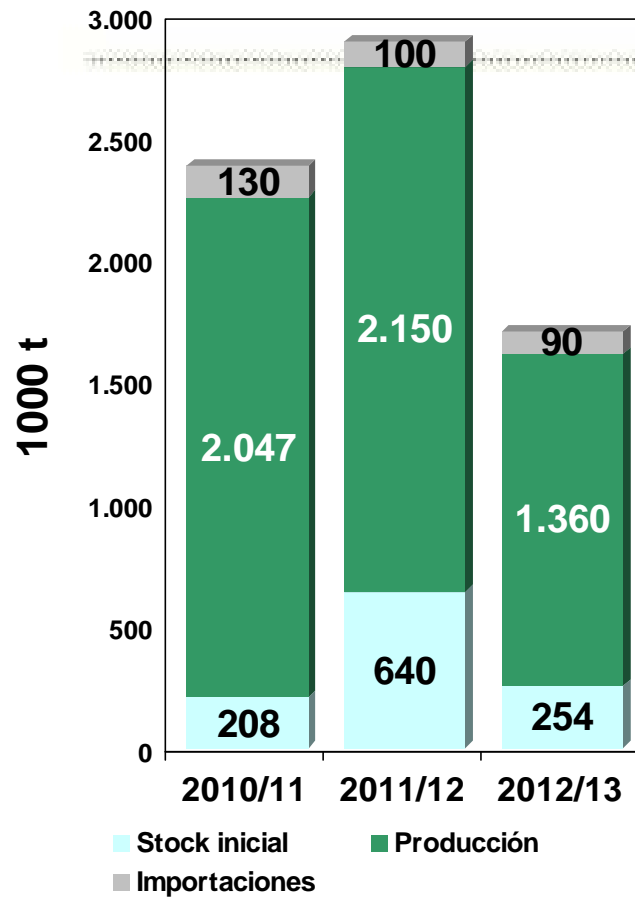
## RUMANÍA: balance maíz



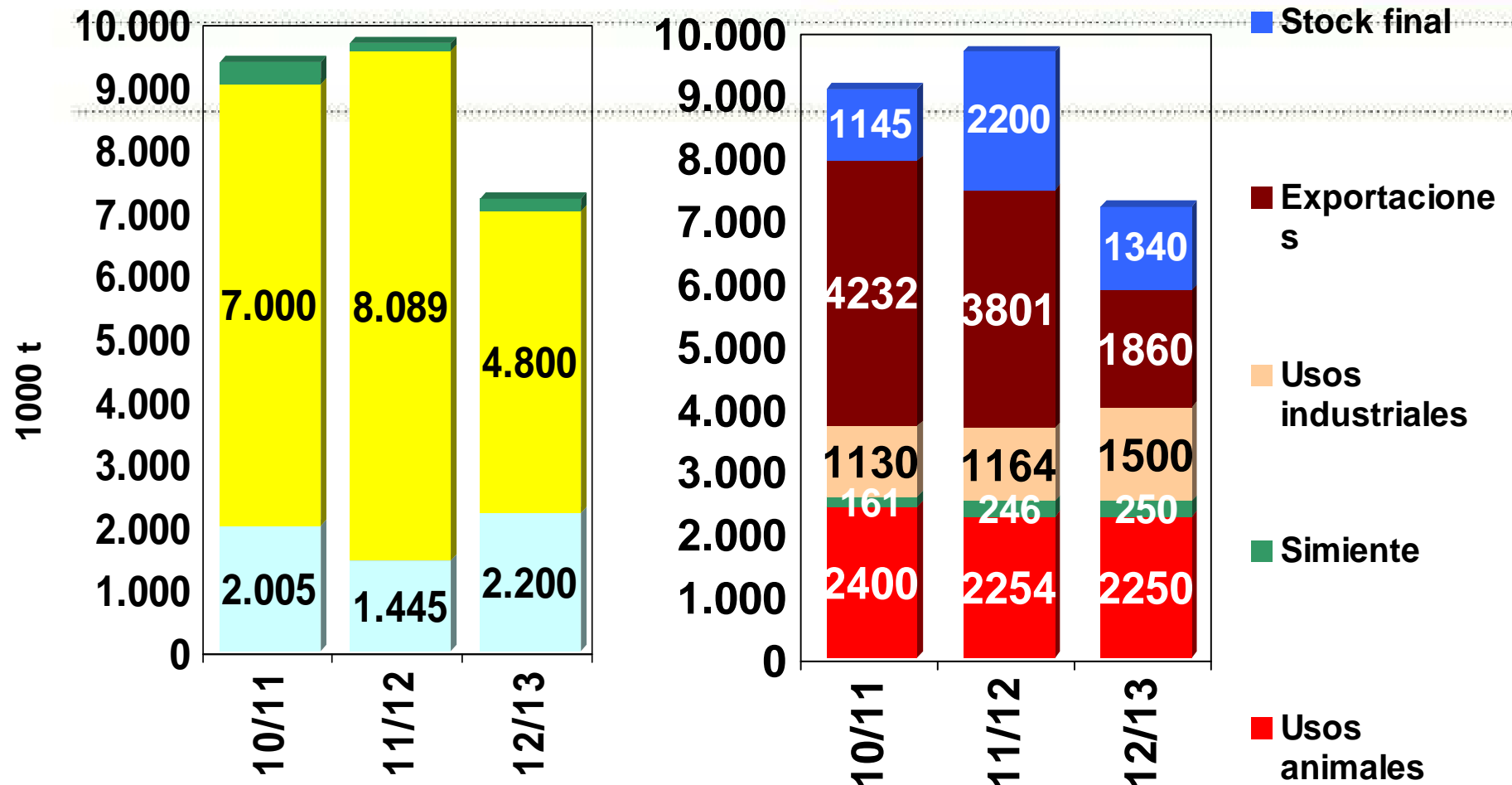
## BULGARIA: balance trigo blando



## BULGARIA: balance maíz

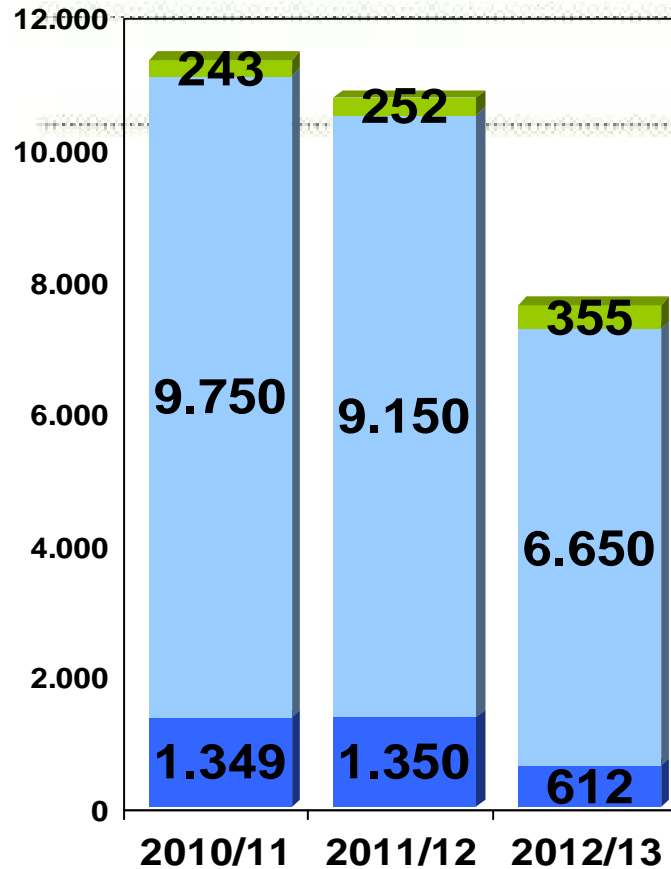


## Hungría, balance maíz

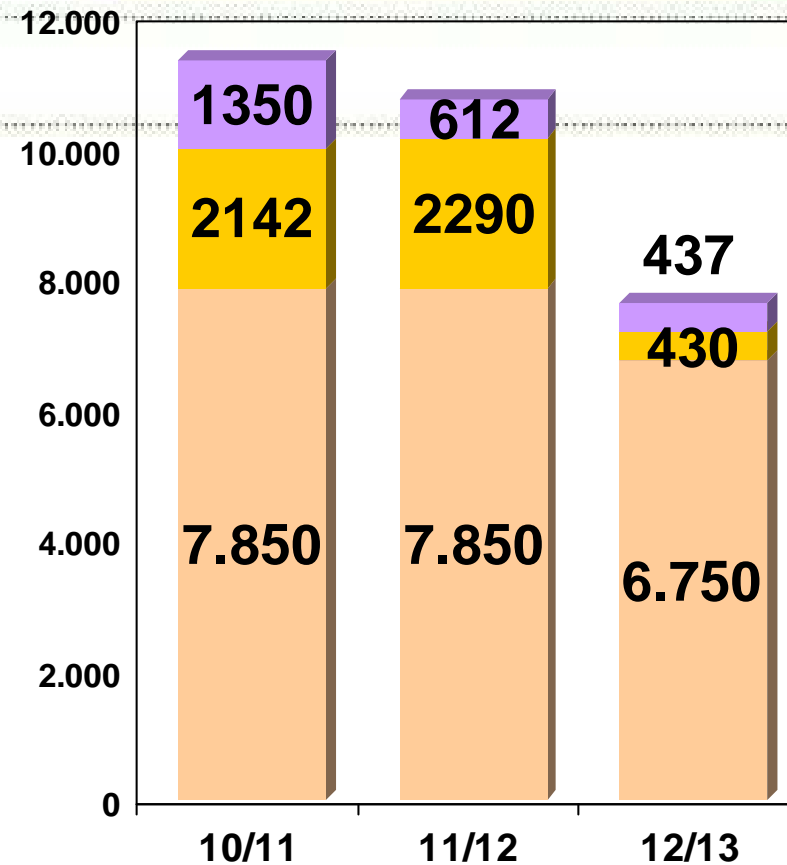


Stock Producción

# Balance Maíz Balcanes



■ Stock inicial    ■ Producción  
■ Importaciones



■ Conso interior    ■ exportaciones granos    ■ Stocks

# Producción de maíz de la Europa danubiana

	10/11	11/12	12/13	%
Roumanie	9 042	11 600	5 700	-51%
Bulgarie	2 047	2 150	1 360	-37%
Hongrie	7 000	8 089	4 800	-41%
Balkans occidentaux	9 750	9 150	6 650	-27%
Total	27 839	30 989	18 510	-40%



FranceAgriMer

## RAINFALL

Cumulated values

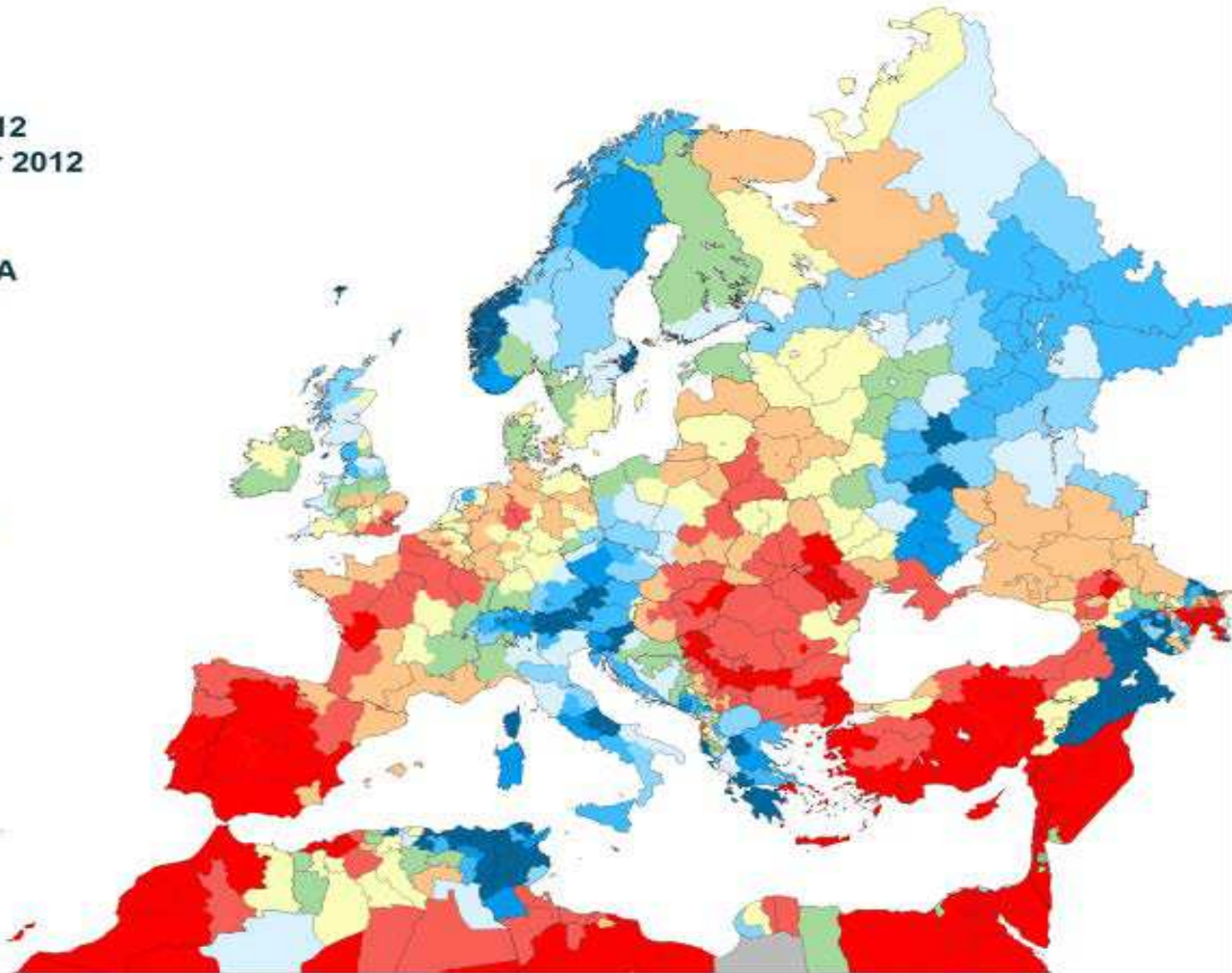
from : 21 August 2012

to : 15 September 2012

Deviation:

Year of interest - LTA

Unit: %



17/09/2012

resolution: NUTS Level 2



(c) European Union 2012,  
source: Joint Research Centre  
Processed by: ALTERRA consortium



## RAINFALL

ECMWF operational model (starting 20 September 2012)

Cumulated values

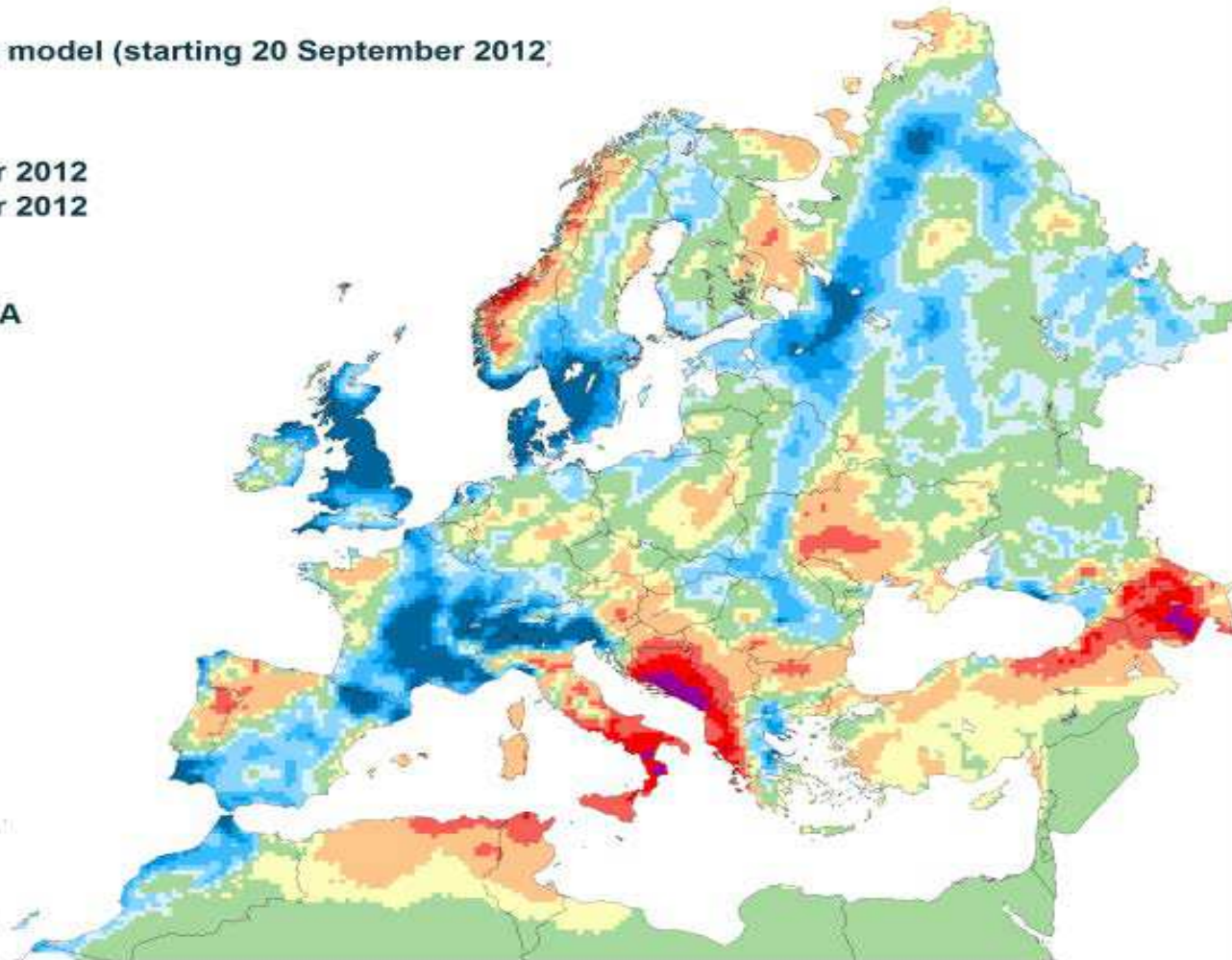
from : 16 September 2012

to : 29 September 2012

Deviation:

Year of interest - LTA

Unit: mm



20/09/2012

resolution: 25x25 km

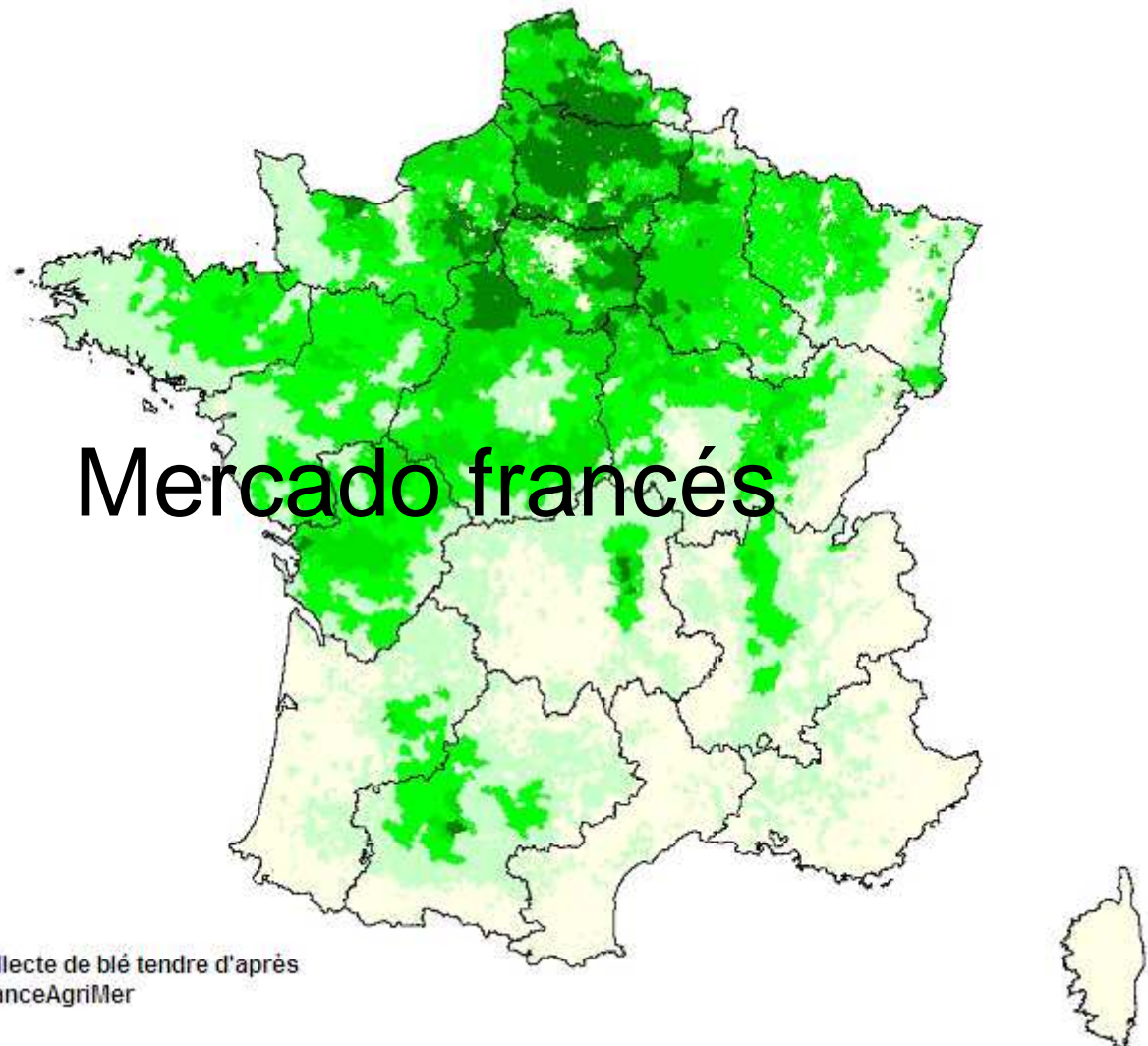


(c) European Union 2012,  
source: Joint Research Centre  
Processed by: ALTERRA consortium





FranceAgriMer

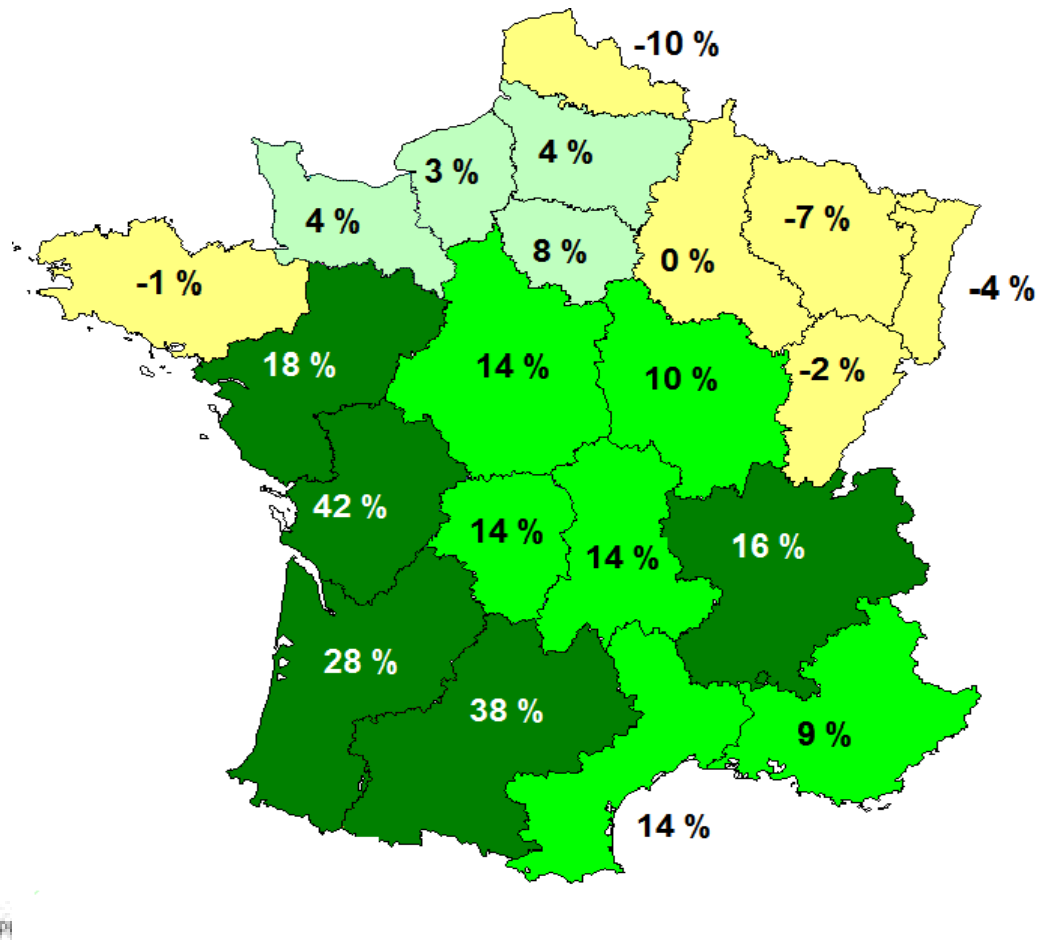


# Mercado francés

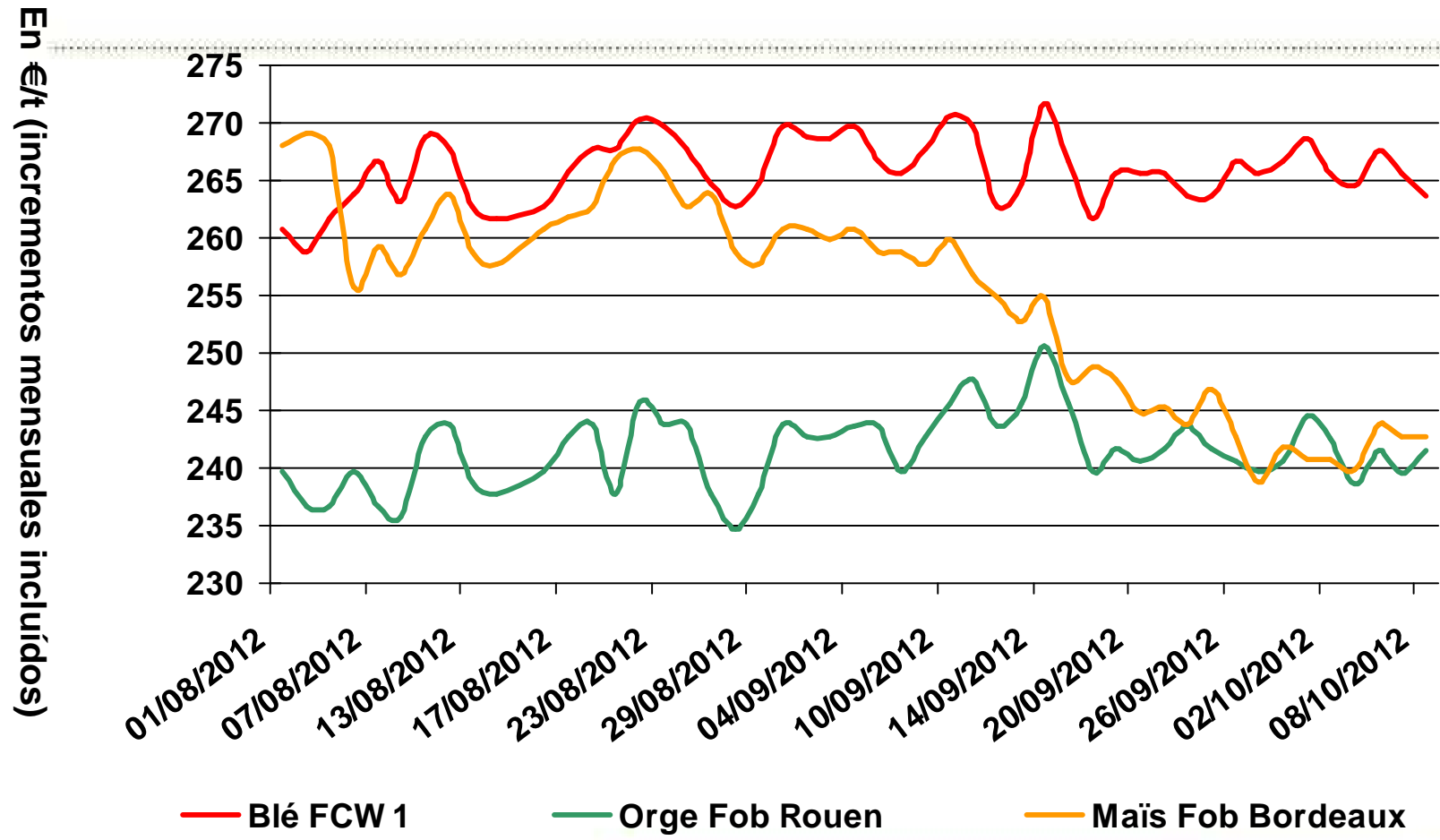
densité de collecte de blé tendre d'après les états 1 FranceAgriMer



Trigo blando: Evolución de los rendimientos (cosecha 2012 con relación a 2011): 74 qx/ha (68 qx/ha)

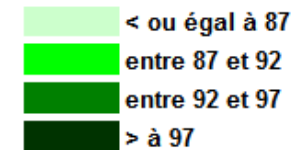
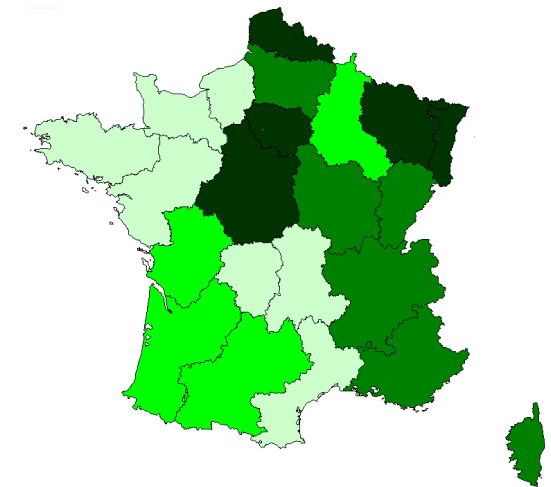
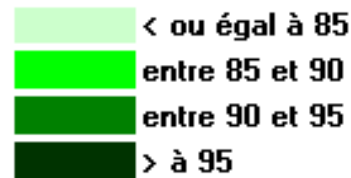
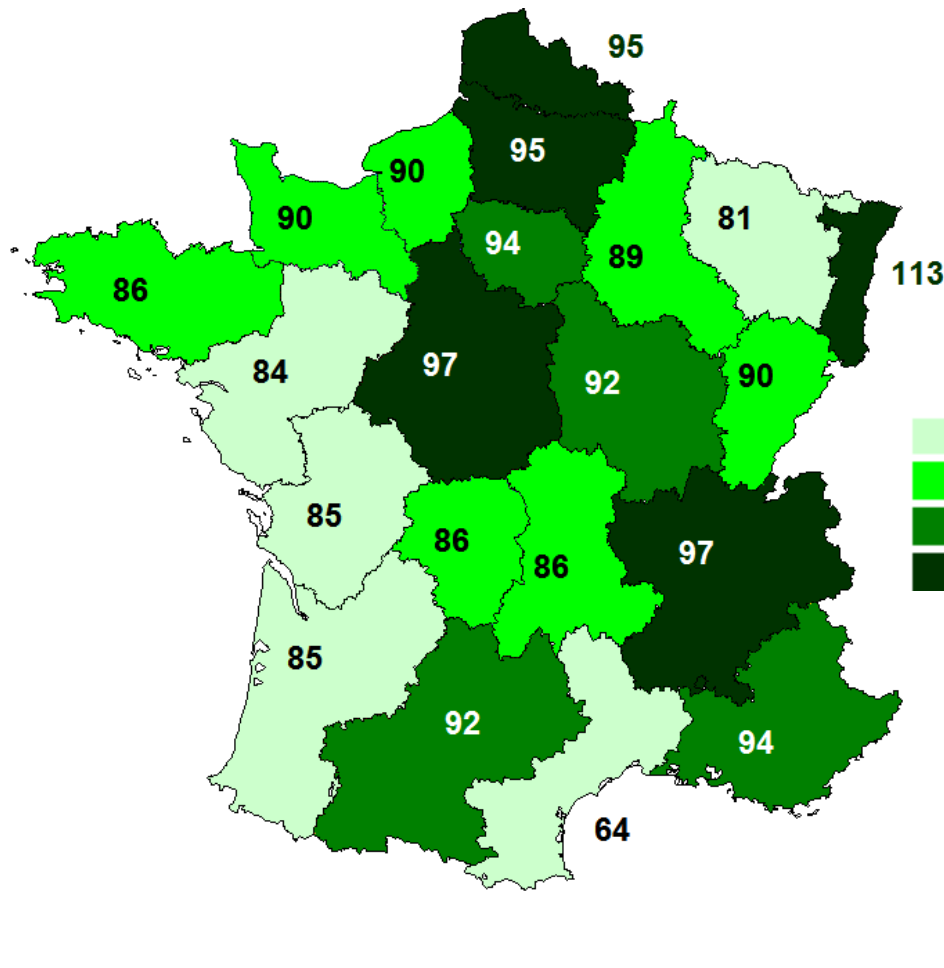


# Cereales franceses: cotizaciones para exportación



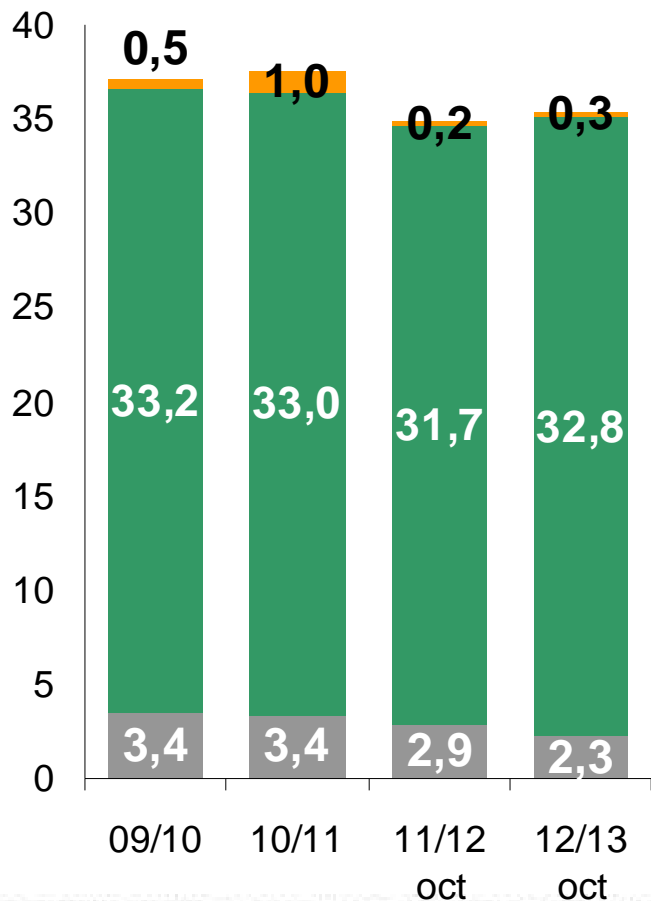
# Maíz: últimas estimaciones cosecha 2012

Maíz: rendimientos medios 2007-2011



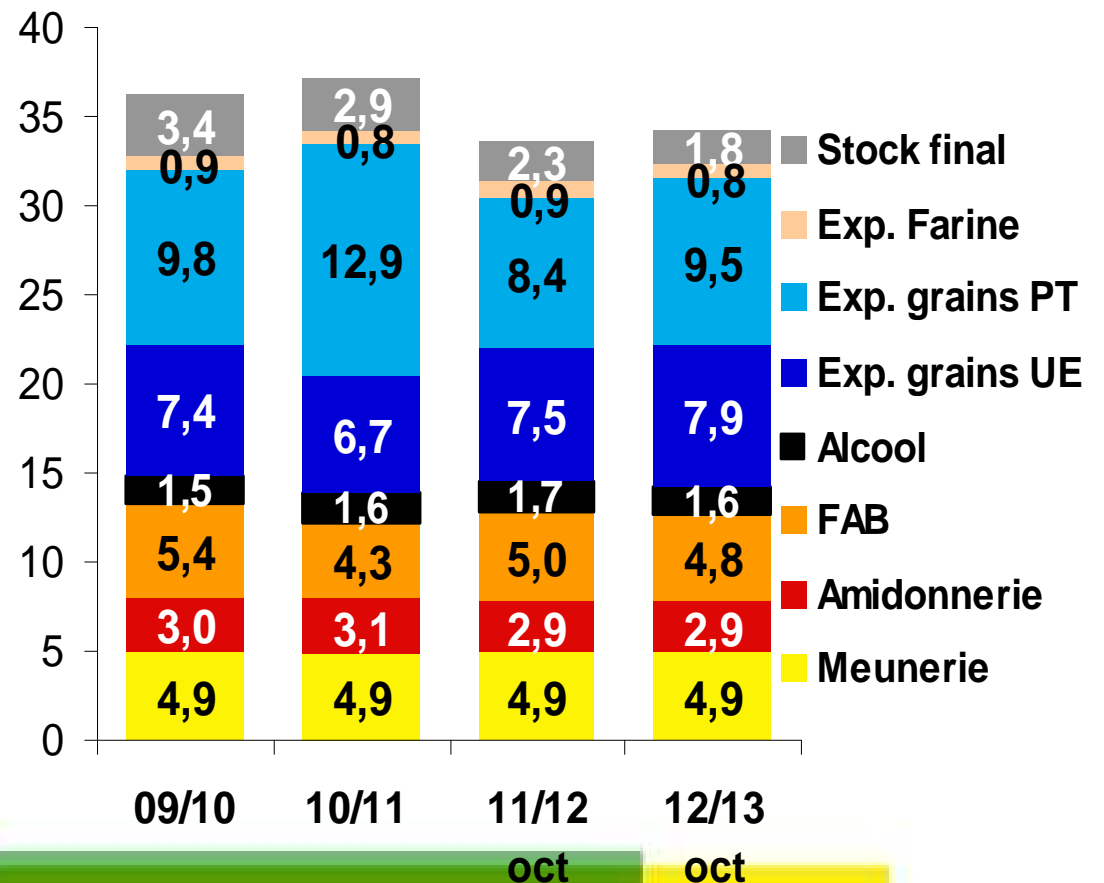
# Balance trigo blando

Mt

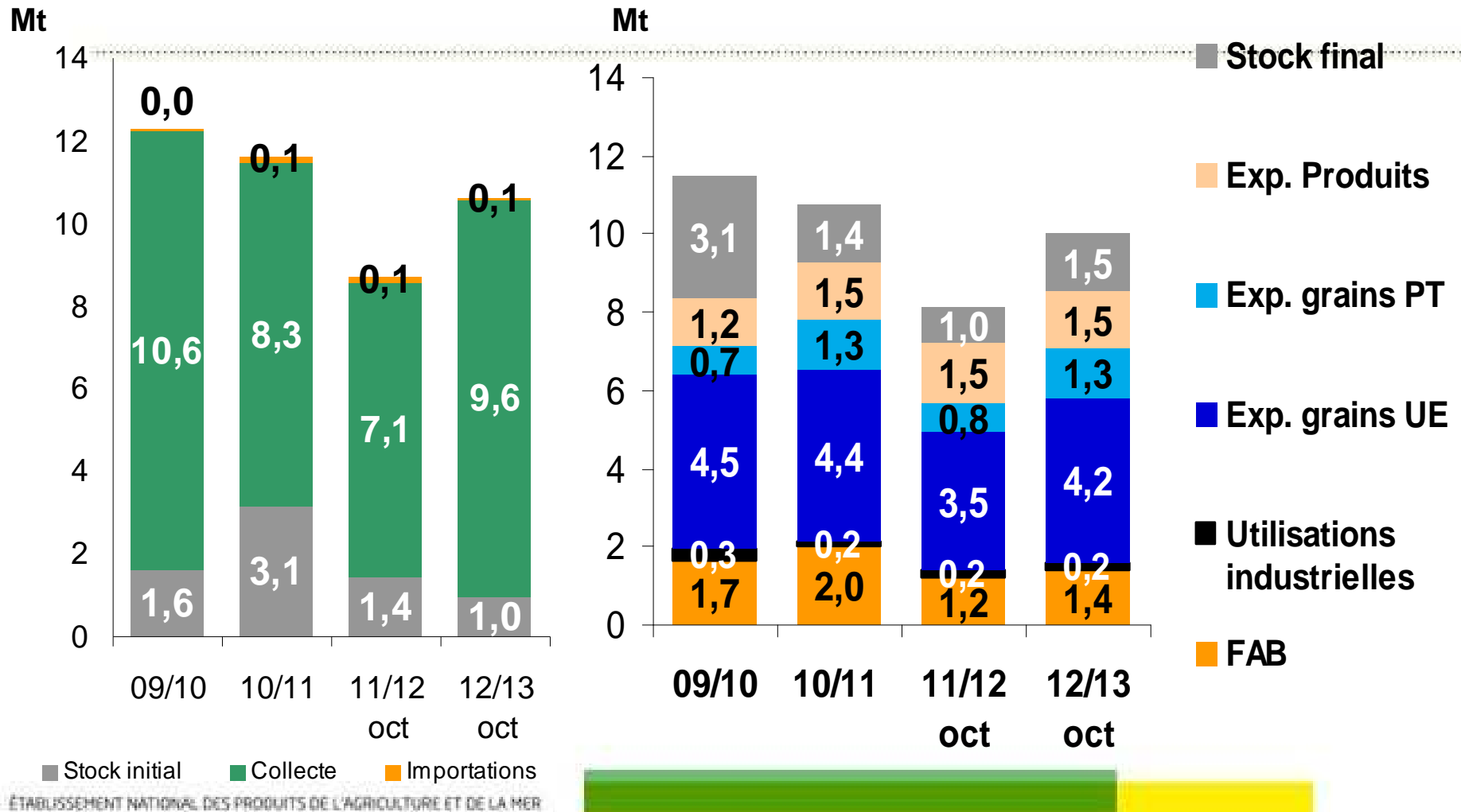


ÉTAT DES LIEUX DES COLLECTES AGRICOLLES

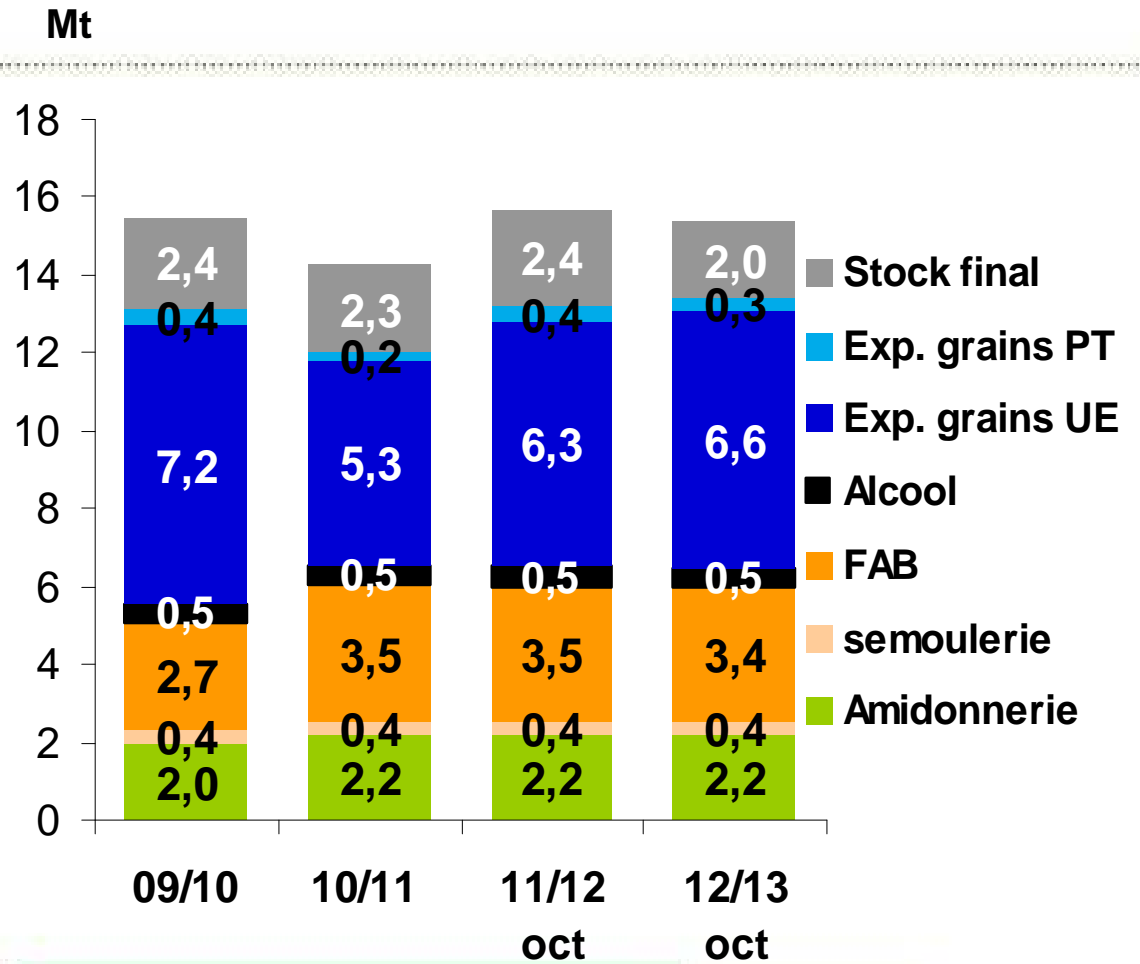
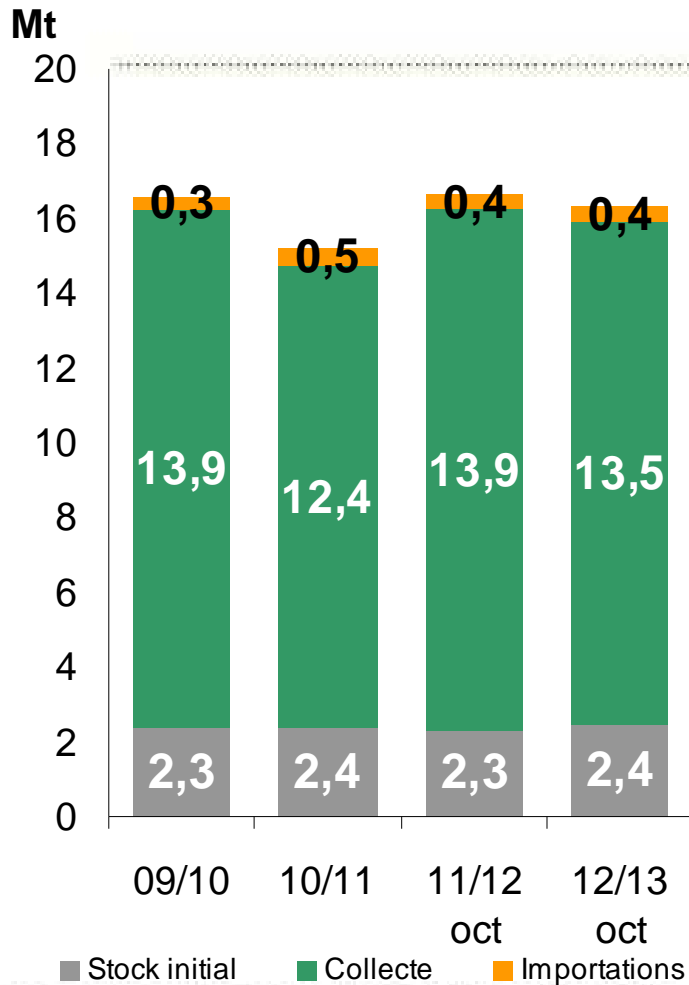
Mt



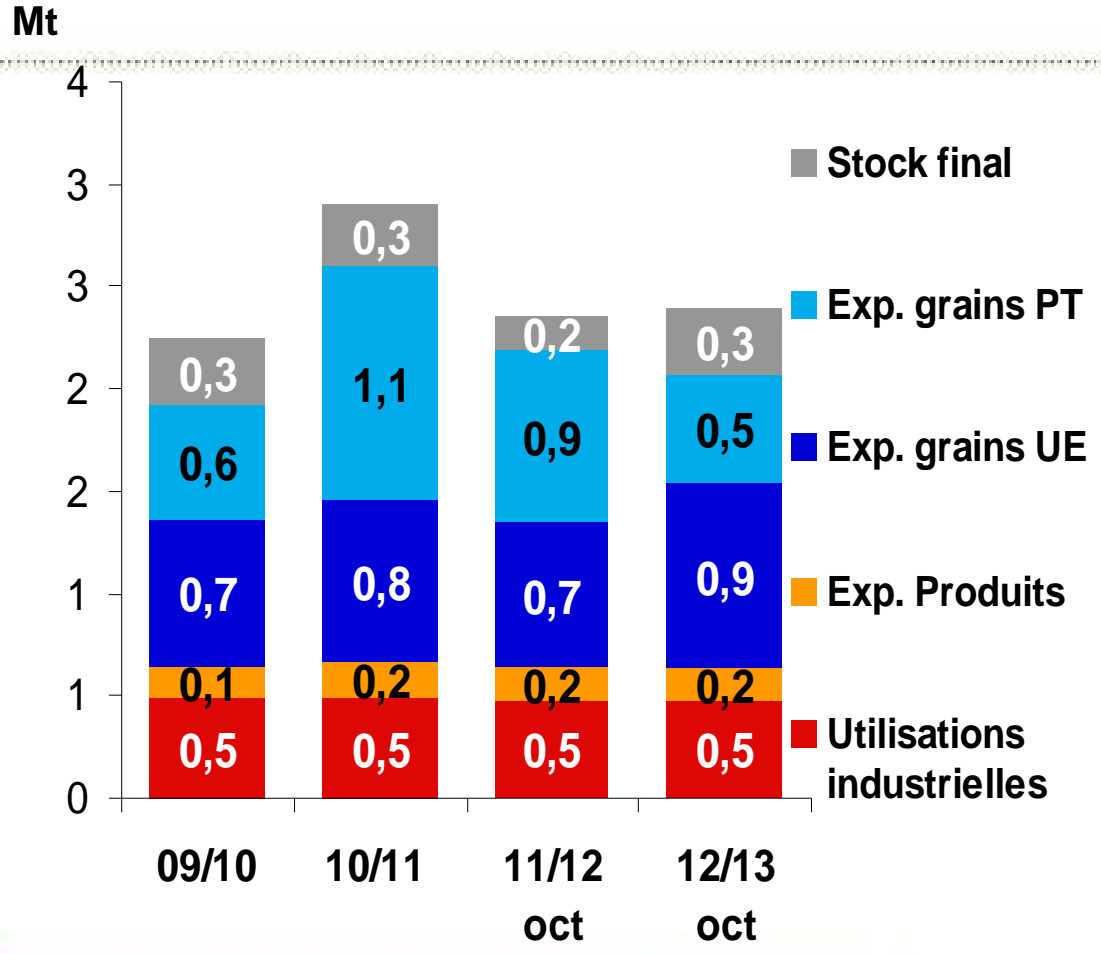
# Balance cebadas



# Balance maïz



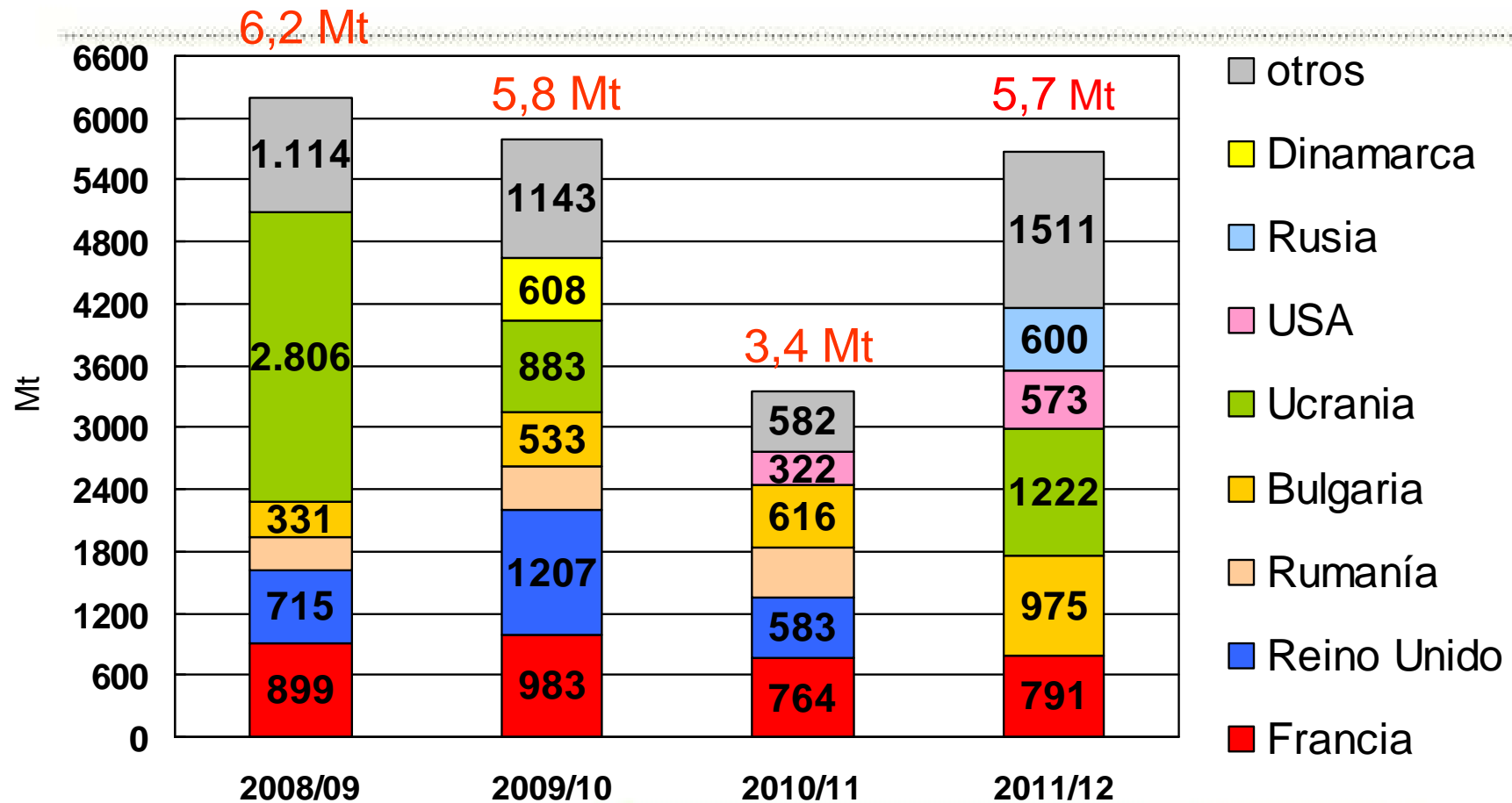
# Balance trigo duro







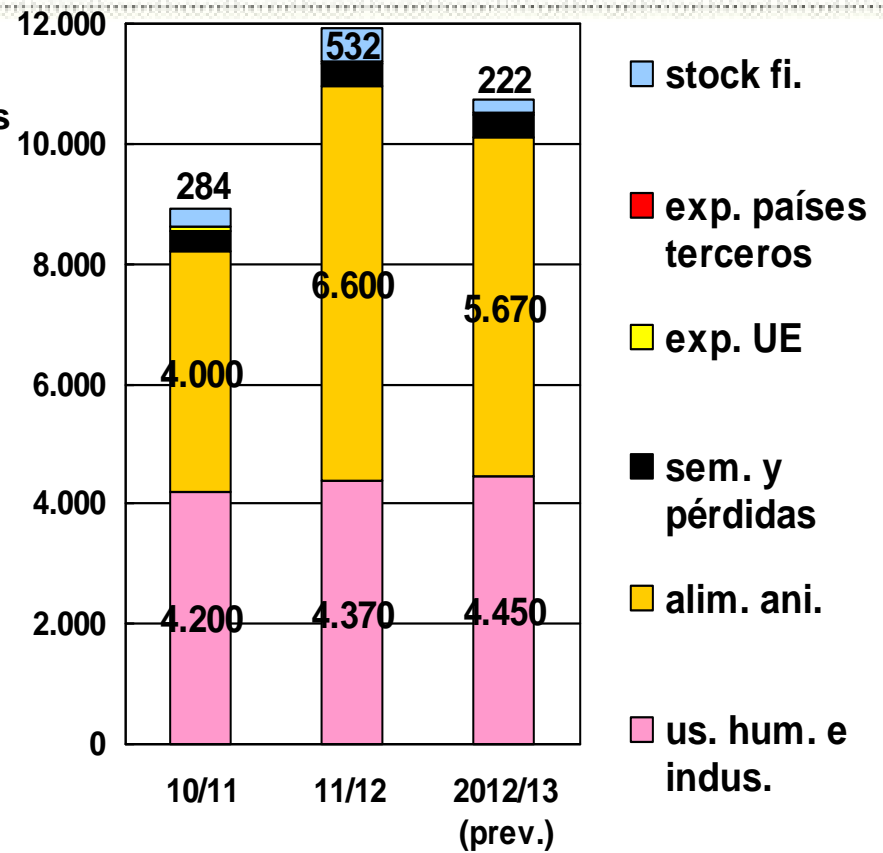
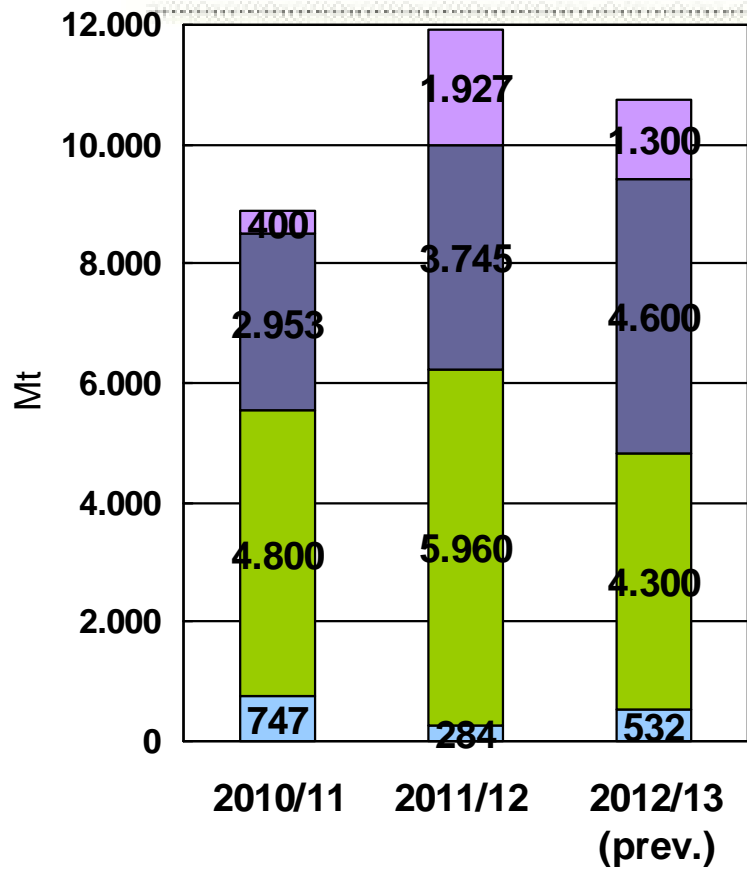
## Principales proveedores de España de TRIGO BLANDO



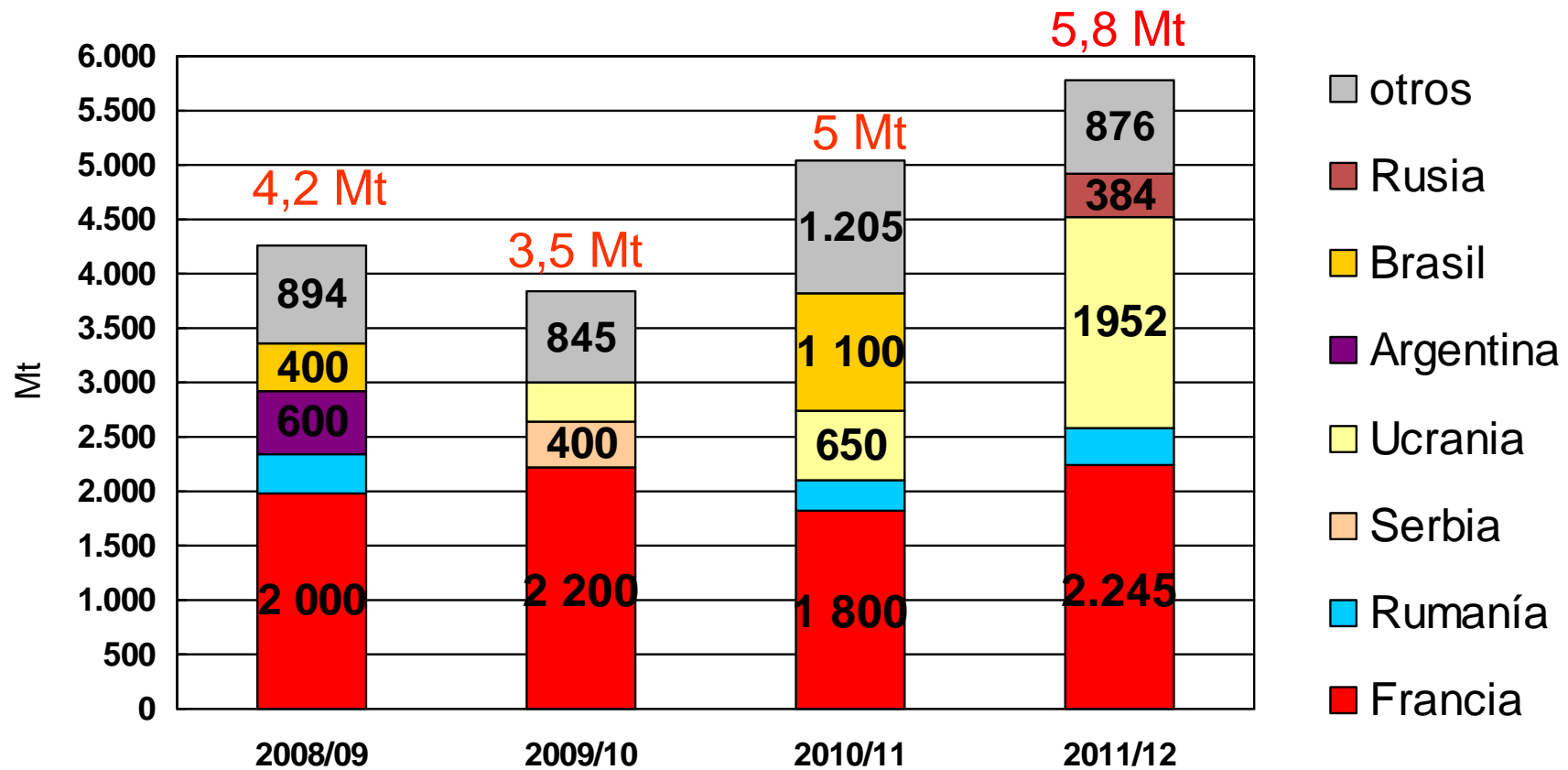
# España – balance TRIGO BLANDO

Total disponible 12/13: 10 732 Mt

Total usos 12/13: 10 732 Mt



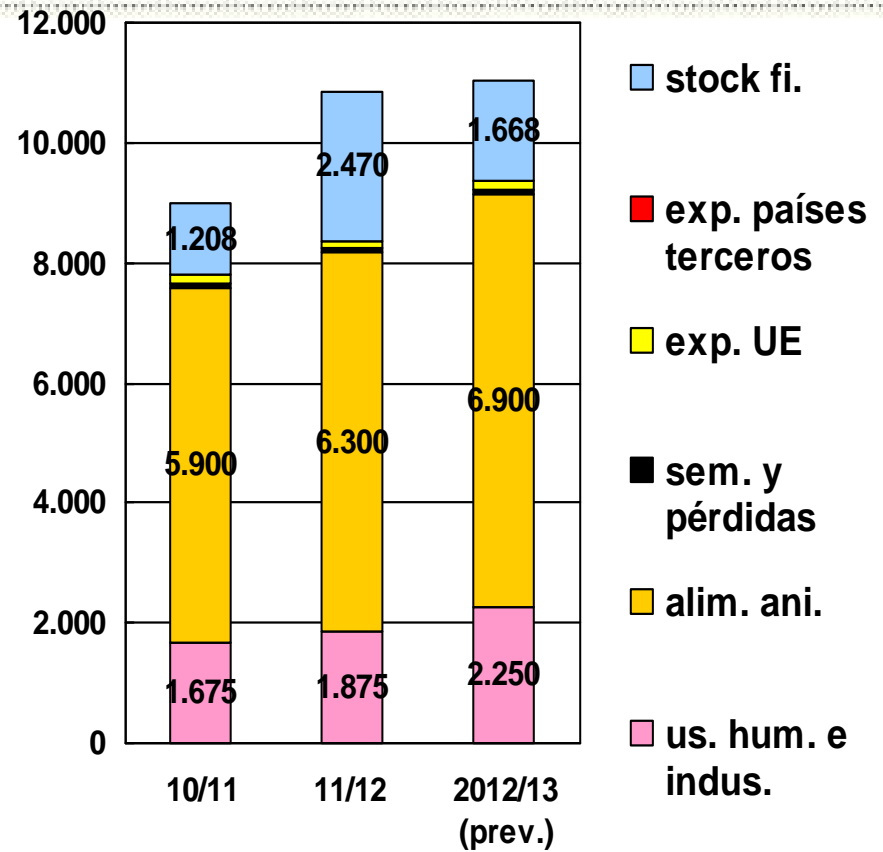
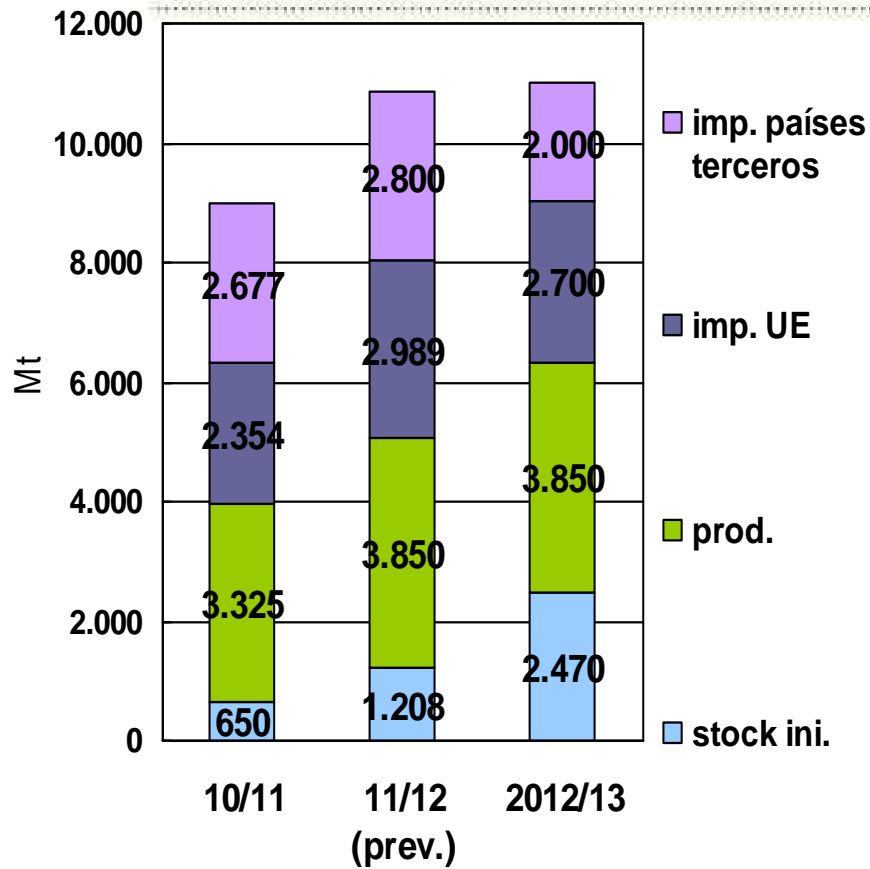
## Principales proveedores de España de MAÍZ



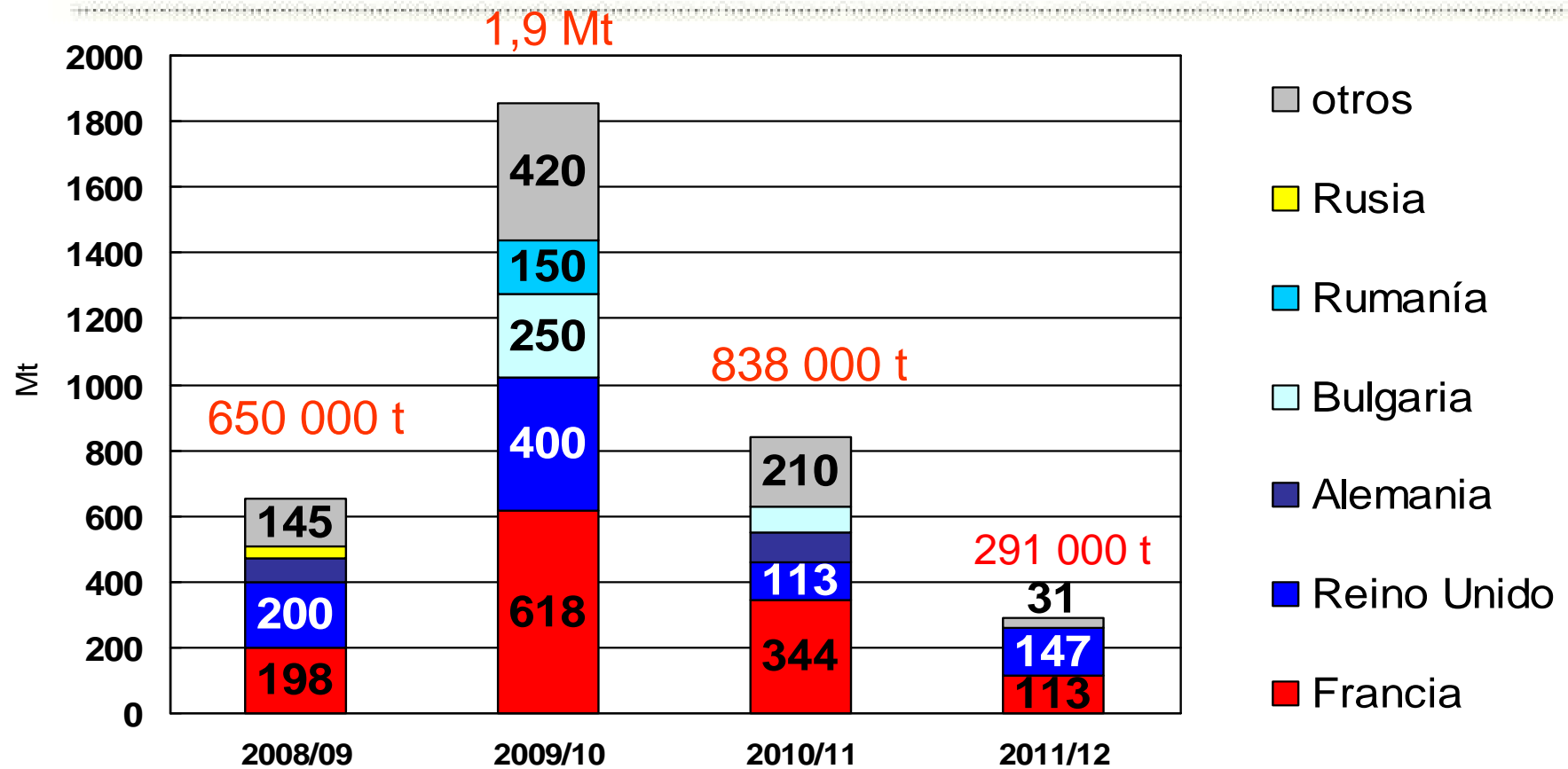
# España – balance MAÍZ

Total disponible 12/13 : 11 020 Mt

Total usos 12/13: 11 020 Mt



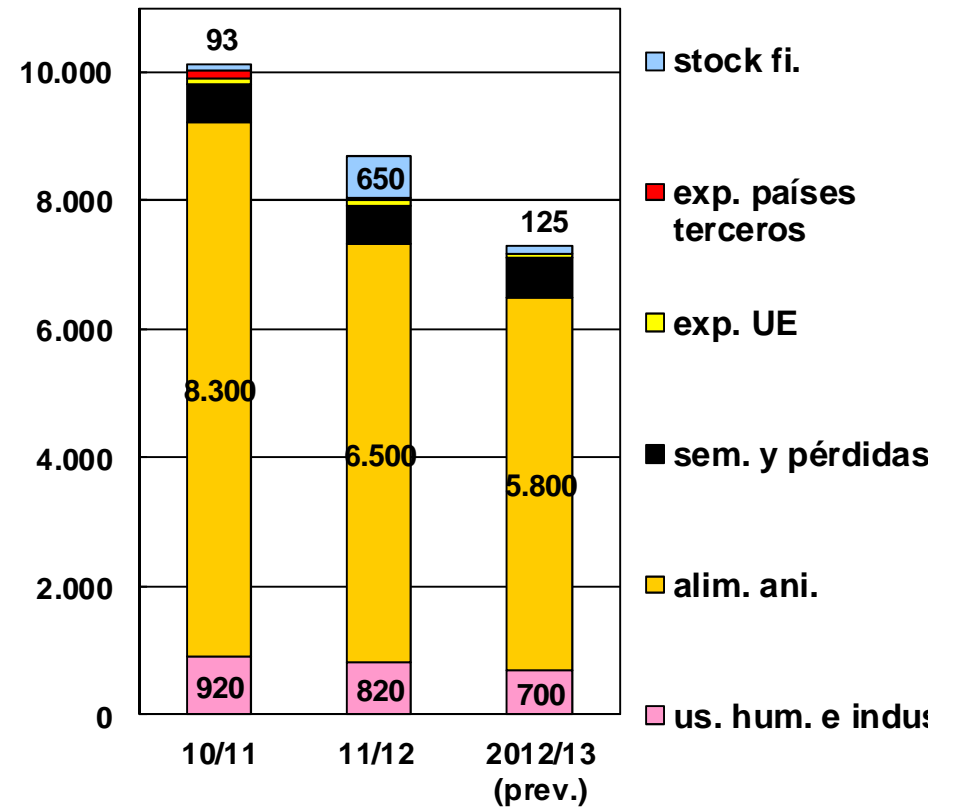
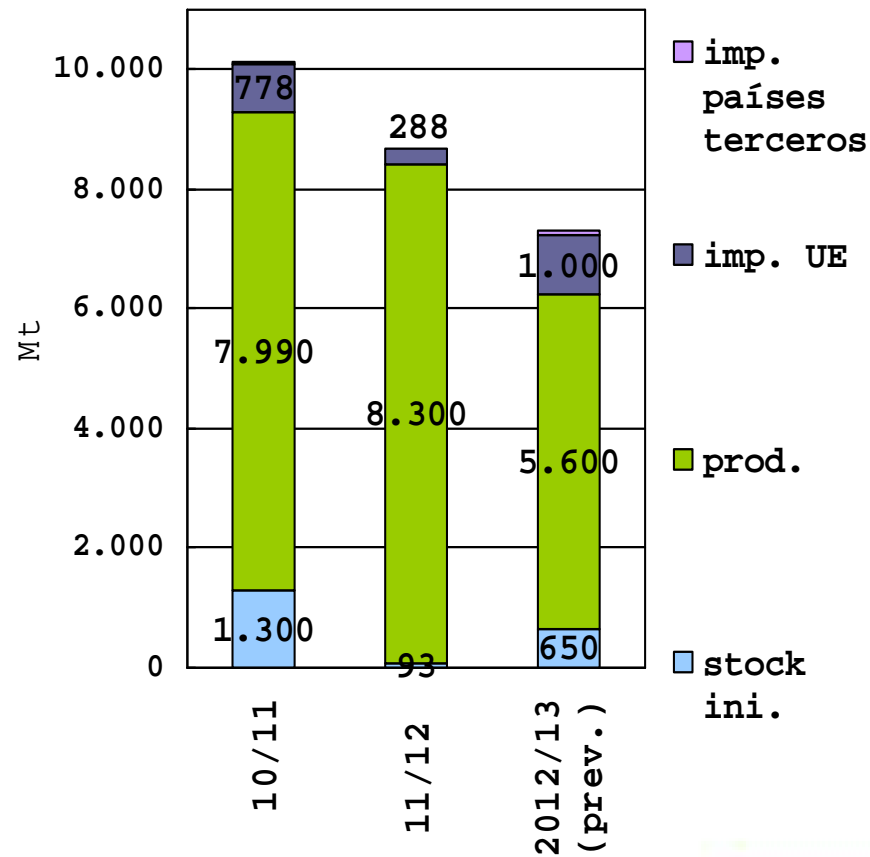
## Principales proveedores de España de CEBADA



# España – balance CEBADA

Total disponible 12/13: 7 290 Mt

Total usos 12/13: 7 290 Mt



## ¿Y después?

- ¿Cuál será realmente la cosecha de maíz?
- ¿Y la cosecha de trigo del hemisferio sur?
- ¿En qué condiciones meteorológicas se llevará a cabo la siembra de invierno?
- ¿Cómo va a evolucionar la política ucraniana en la exportación?
- ¿Cómo se van a comportar los mercados financieros?
- ...

*Gracias por su atención*



