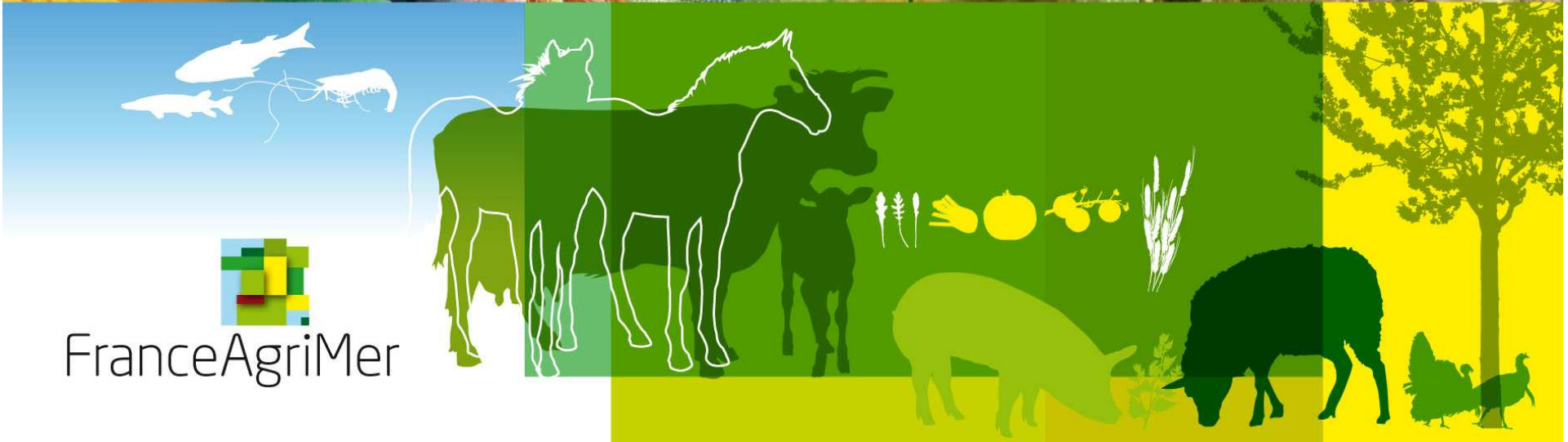


CÉRÉALES /  
FRUITS ET LÉGUMES /  
HORTICULTURE /  
LAIT /  
OLÉO-PROTÉAGINEUX /  
PÊCHE ET AQUACULTURE /  
PLANTES À PARFUM, AROMATIQUES ET MÉDICINALES /  
SUCRE /  
VIANDES BLANCHES /  
VIANDES ROUGES /  
VINS /

# FranceAgriMer



FranceAgriMer

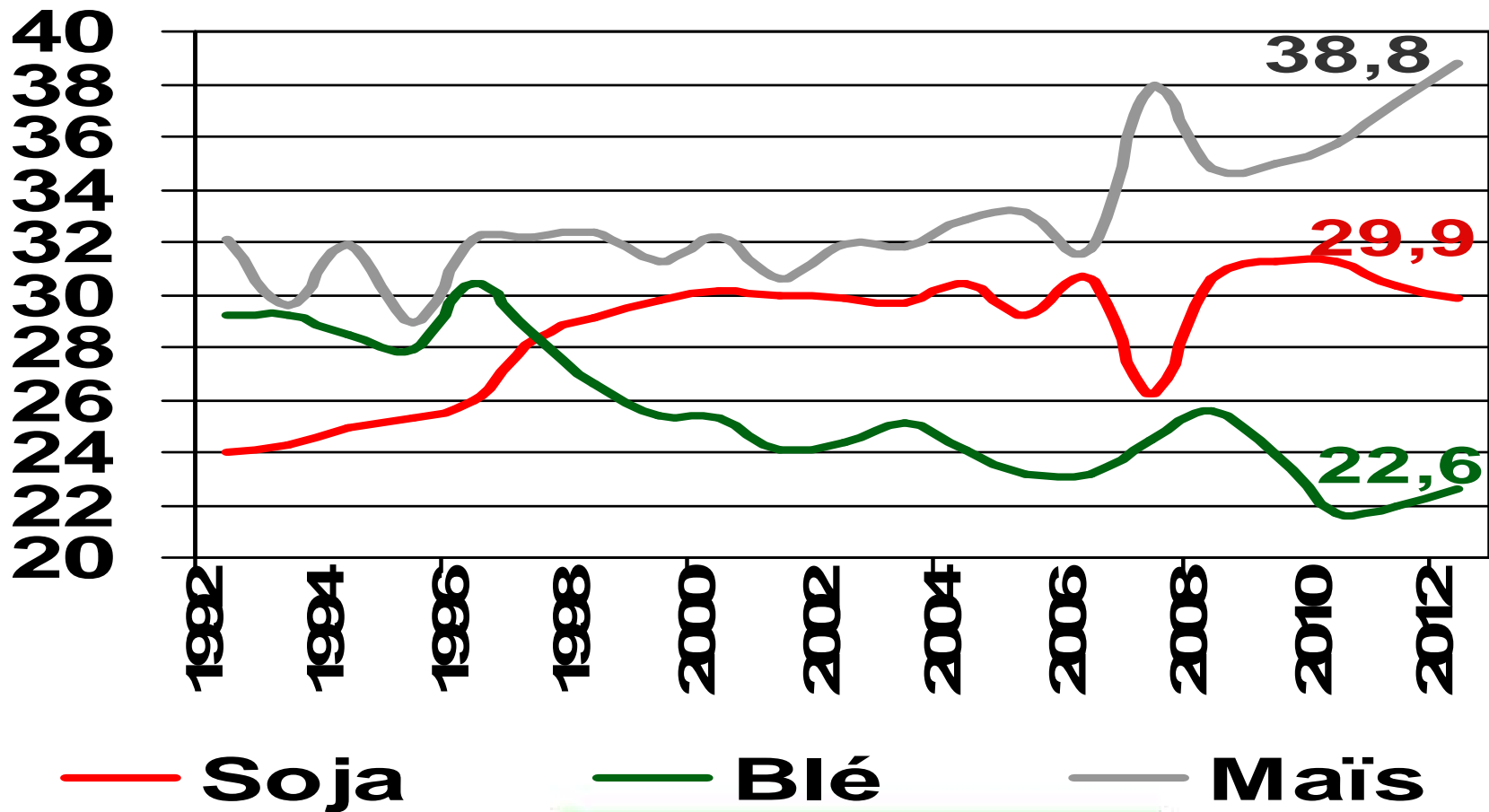
## Points clefs

- Monde
  - Non rapport de l'USDA
  - Perspectives de bilans 2012/13 moins tendus
- UE
  - Les conséquences du gel plus importante que prévue
- France
  - Perte de 350 000 ha de blé tendre
  - Et de 150 000 ha d'orge



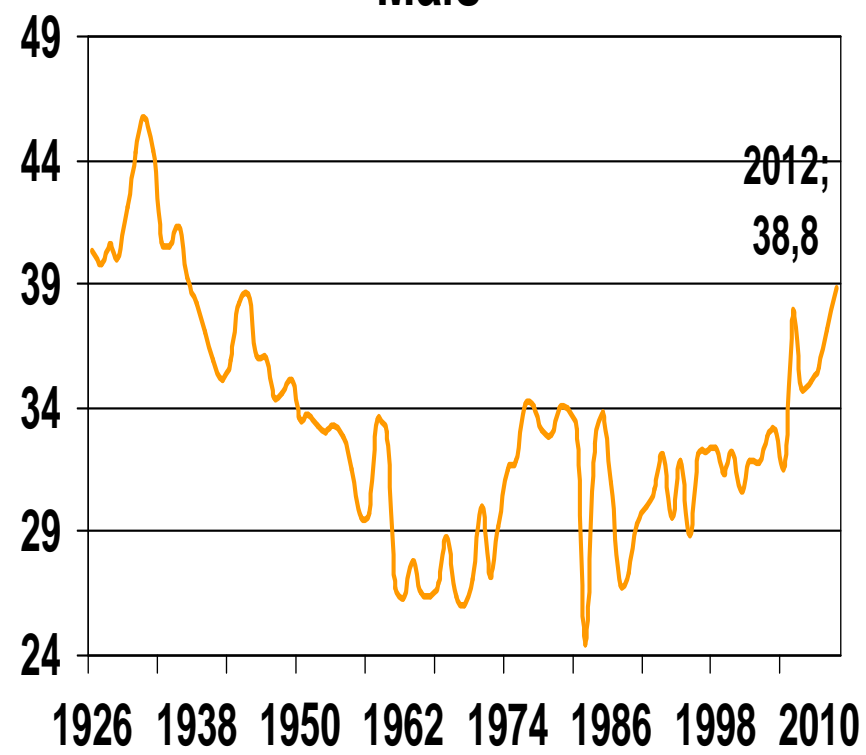
# Marché mondial

# Superficies semées aux USA en blé, maïs et soja

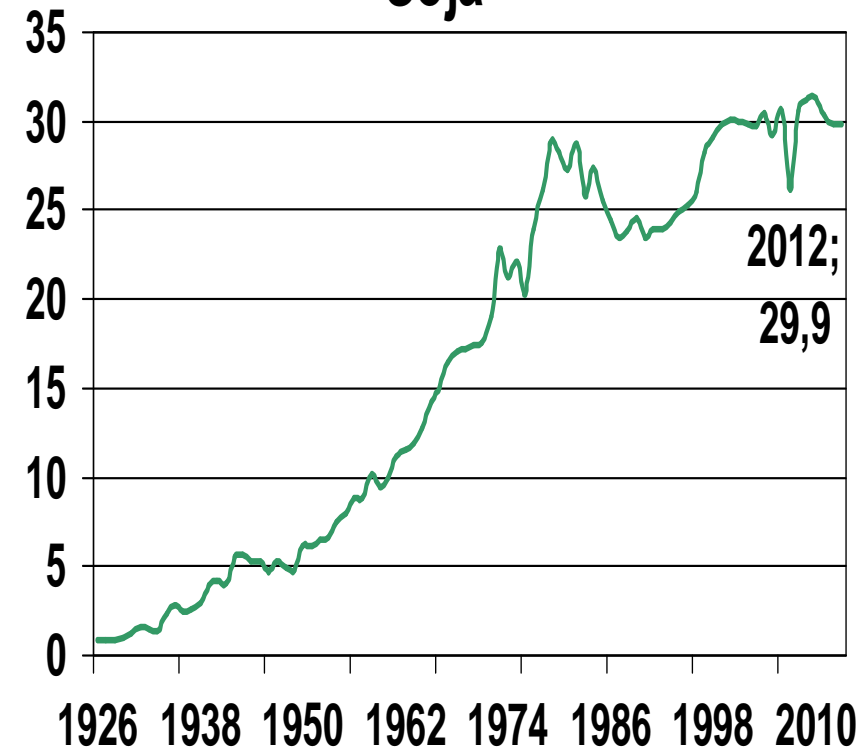


# Superficies dédiées aux USA au maïs et au soja

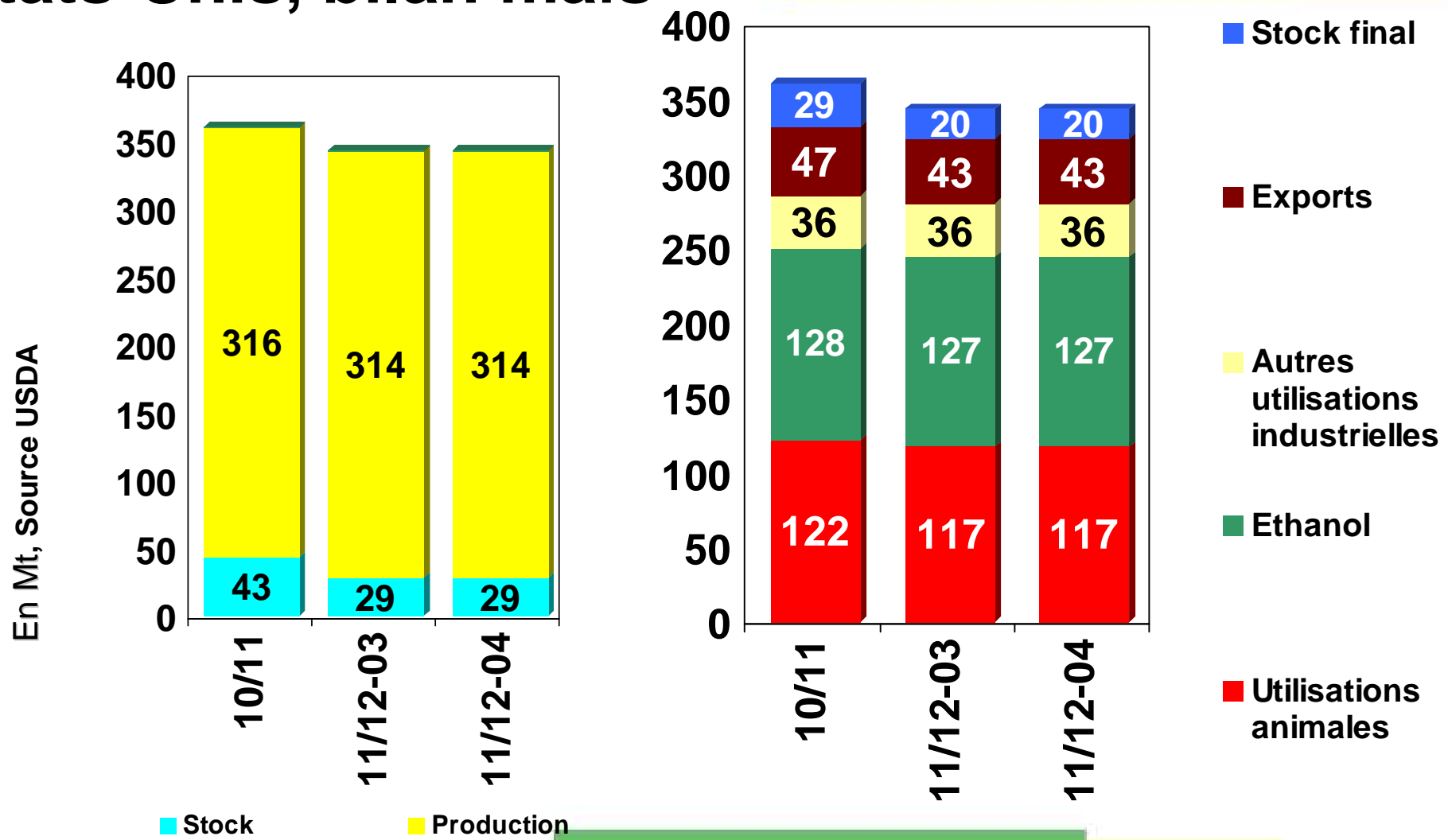
## Maïs



## Soja

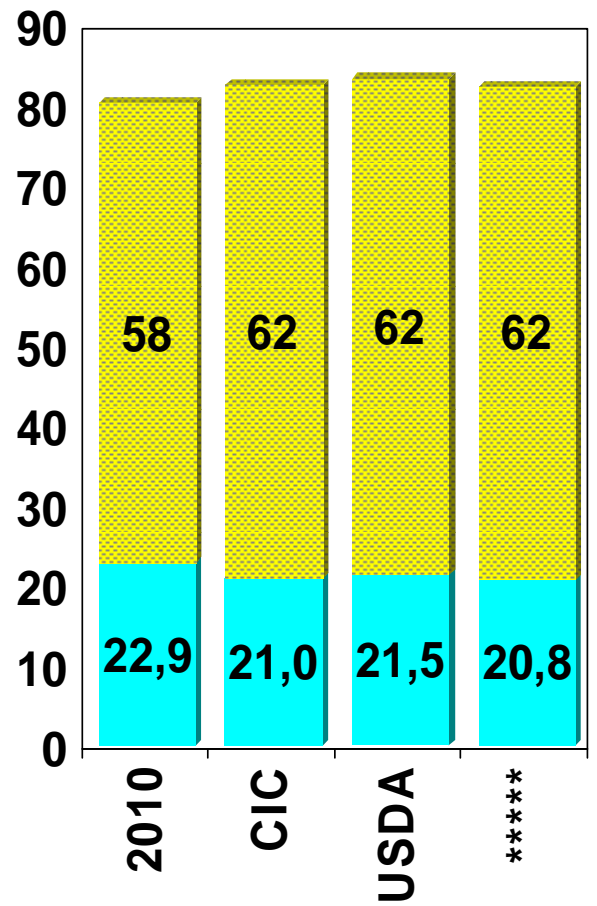


# Etats-Unis, bilan maïs

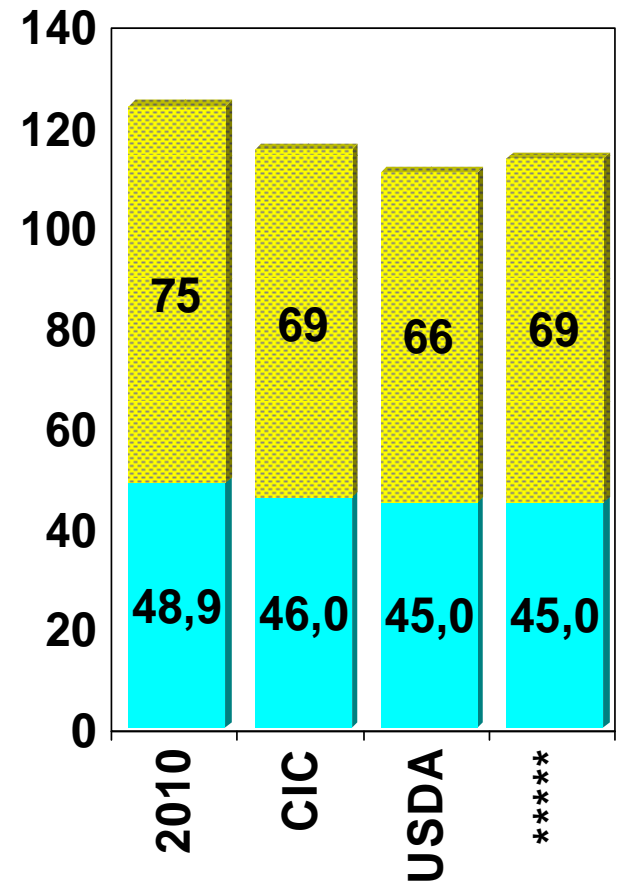


# Production Argentine et Brésil, (2010 et 2011)

**Maïs**



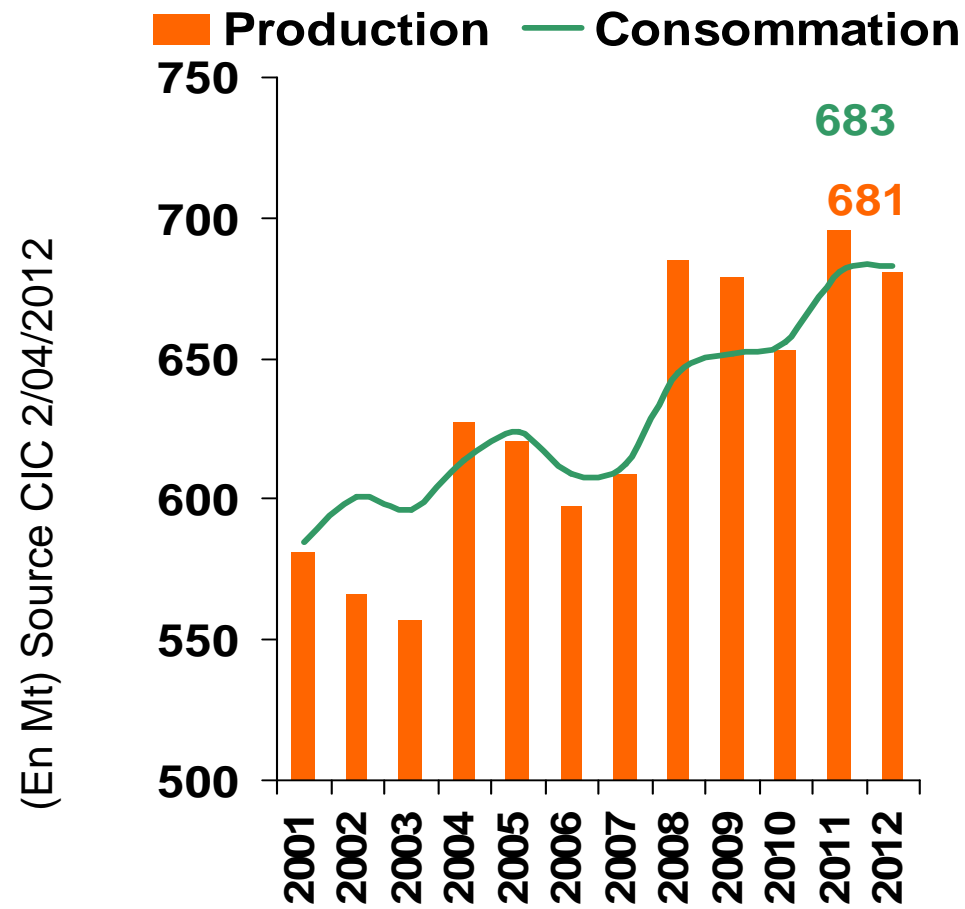
**Soja**



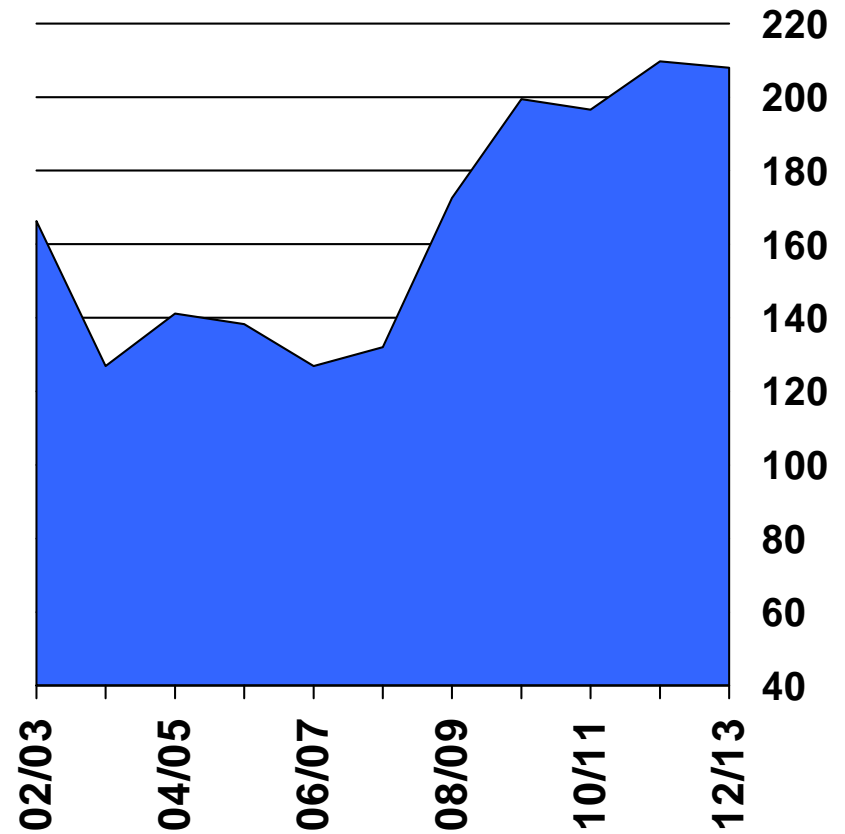
\*\*\*\* Bourse de Buenos Aires et Conab  
 En Mt,

■ Argentine      ■ Brésil

## Bilan mondial blé 2012/13

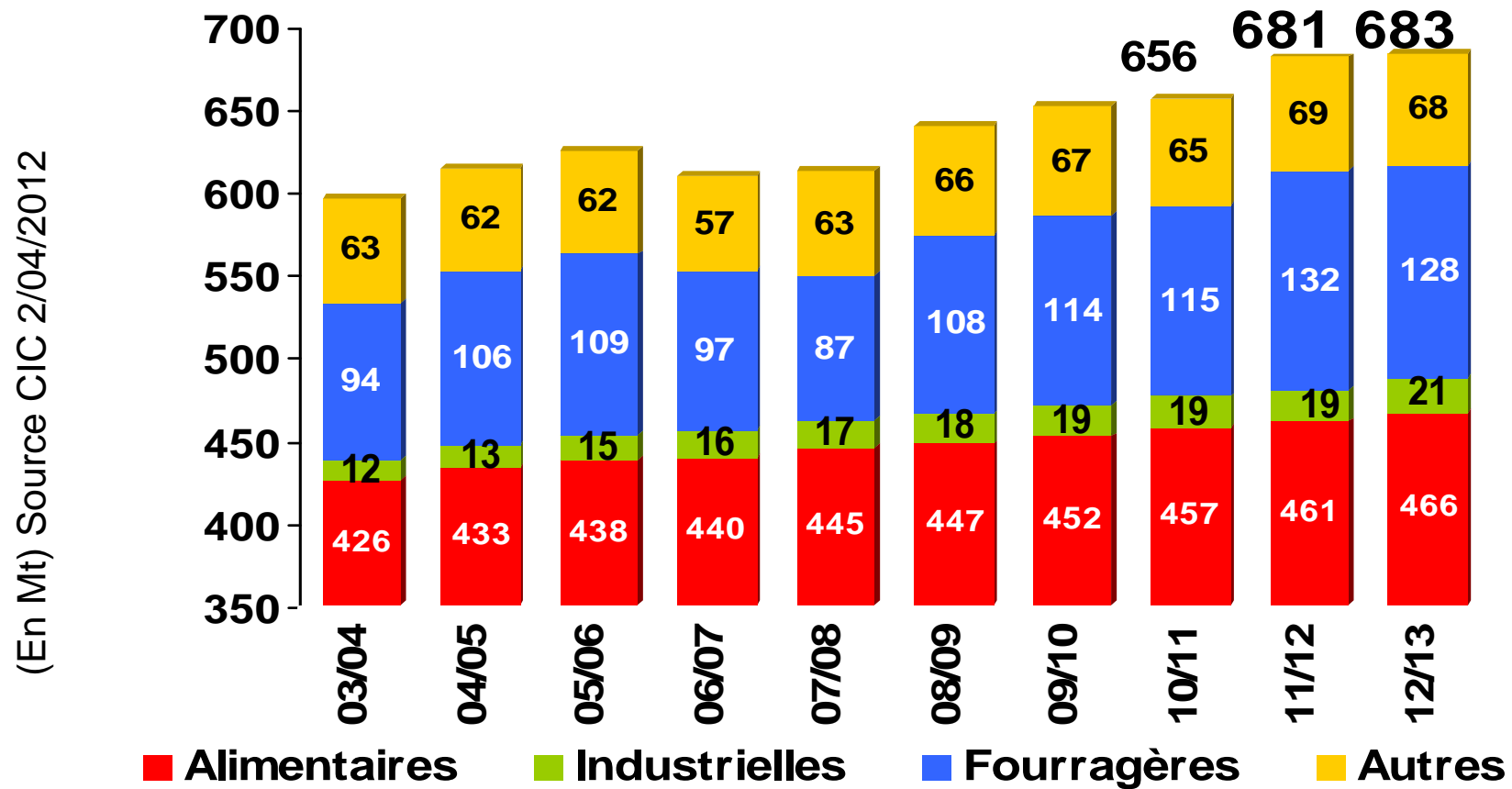


## Stocks mondiaux



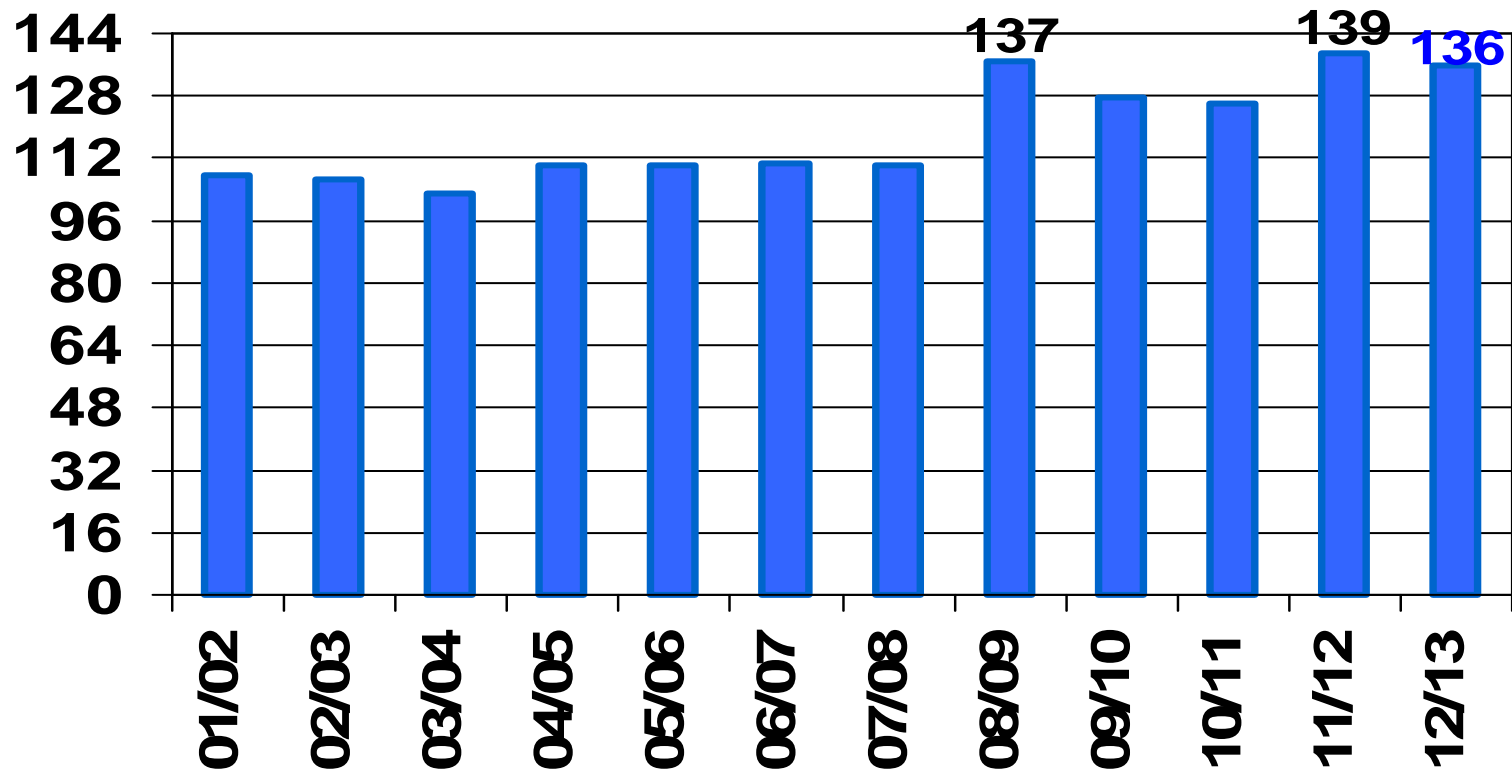


## Consommation mondiale de blé 2012/13

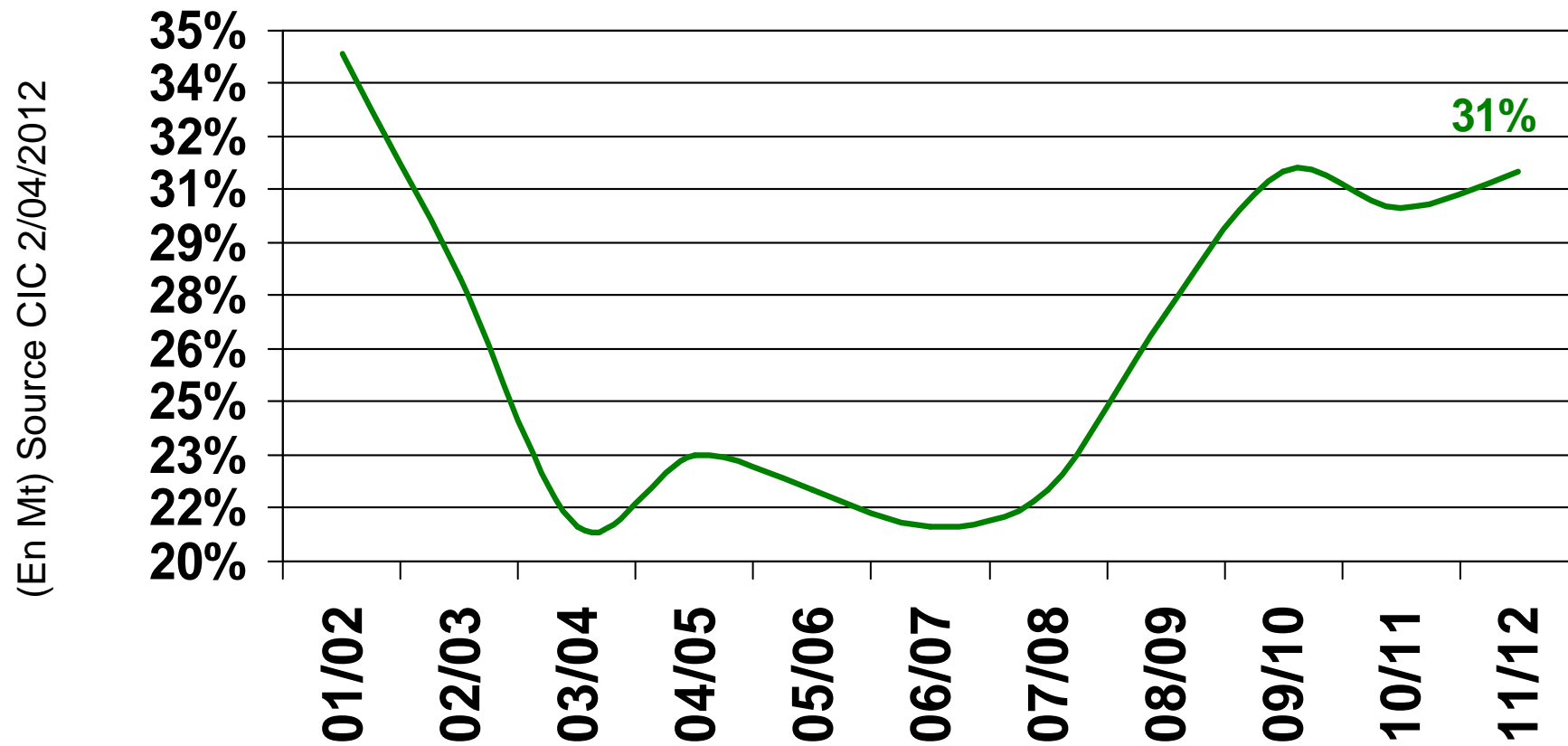


# Commerce mondial du blé

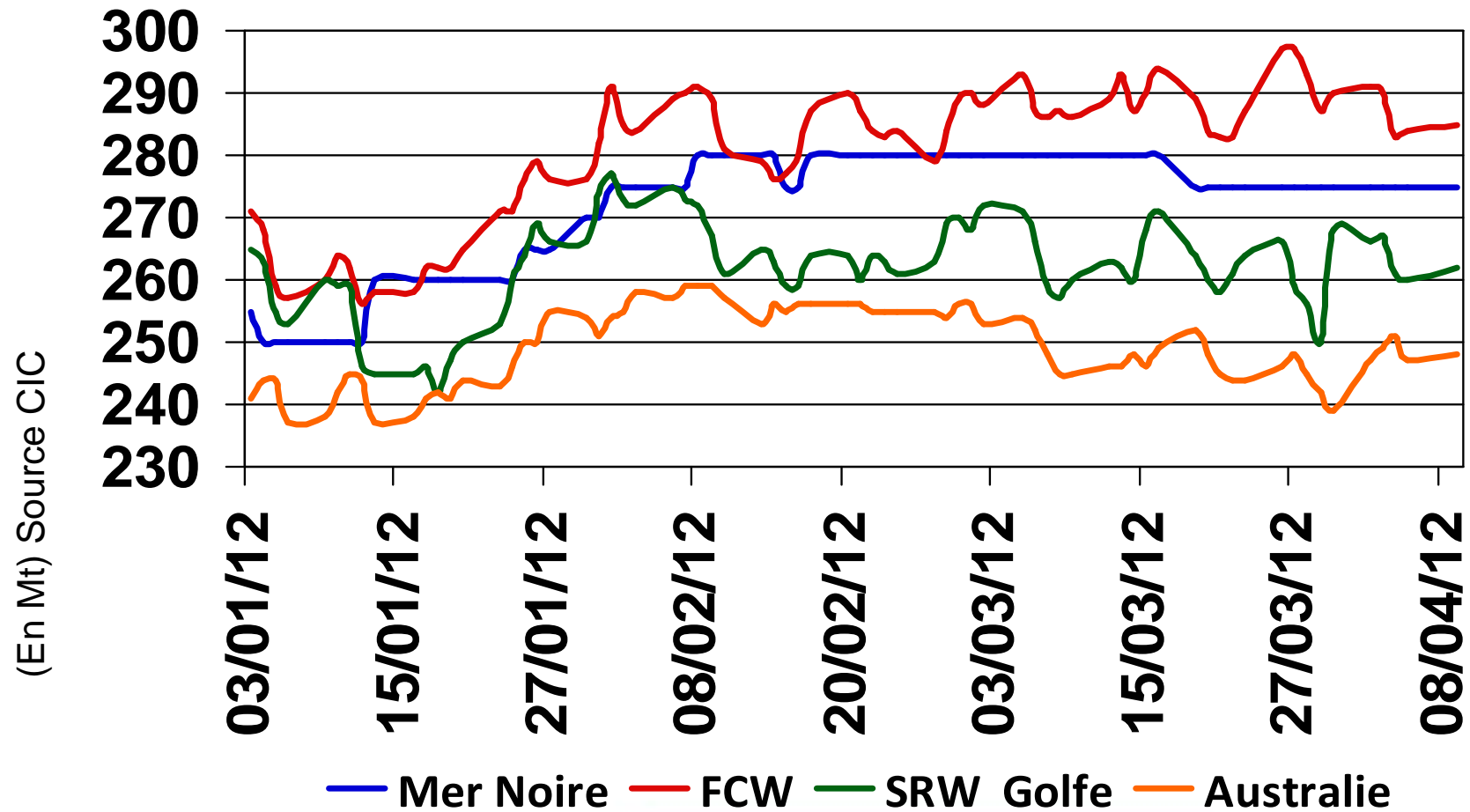
(En Mt) Source CIC 2/04/2012



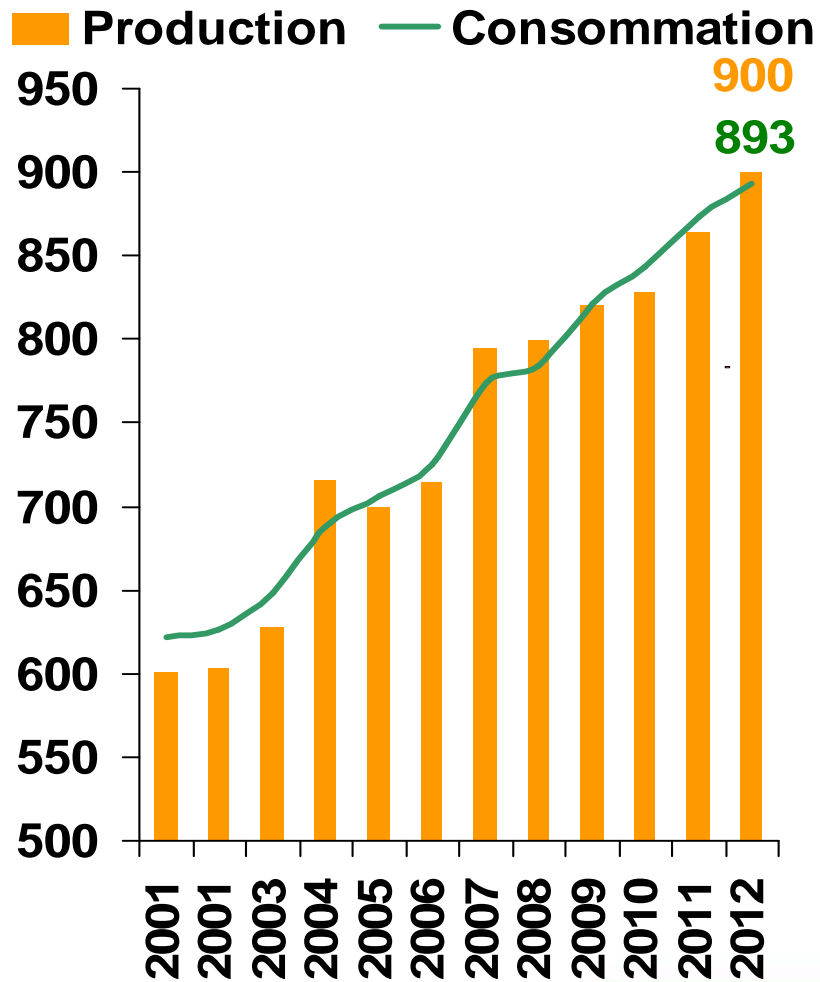
# Ratio stock sur consommation



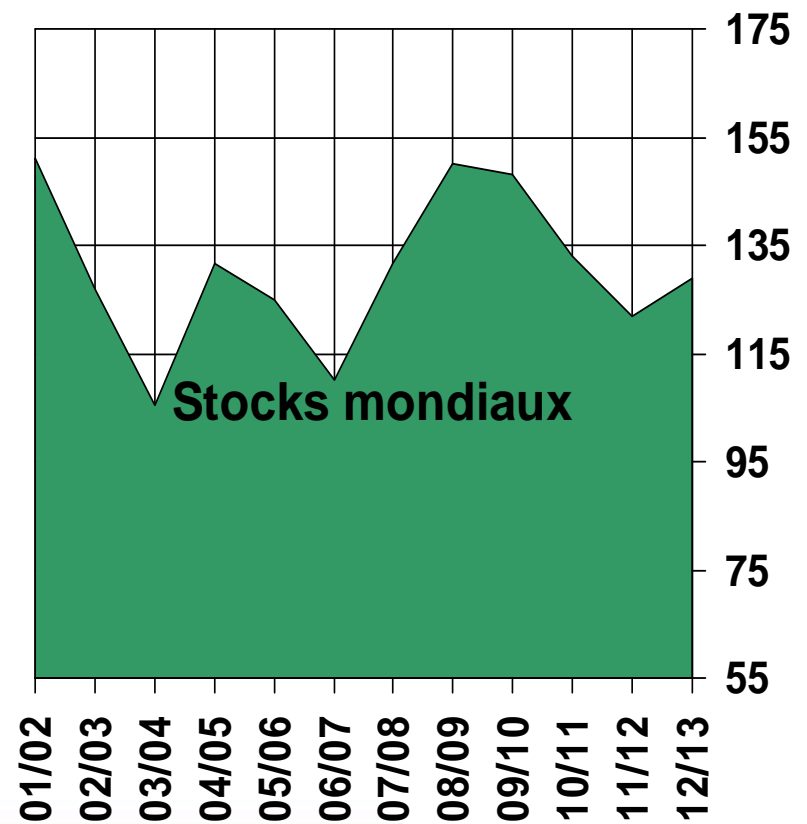
# Evolution des prix du blé tendre



# Bilan mondial du maïs

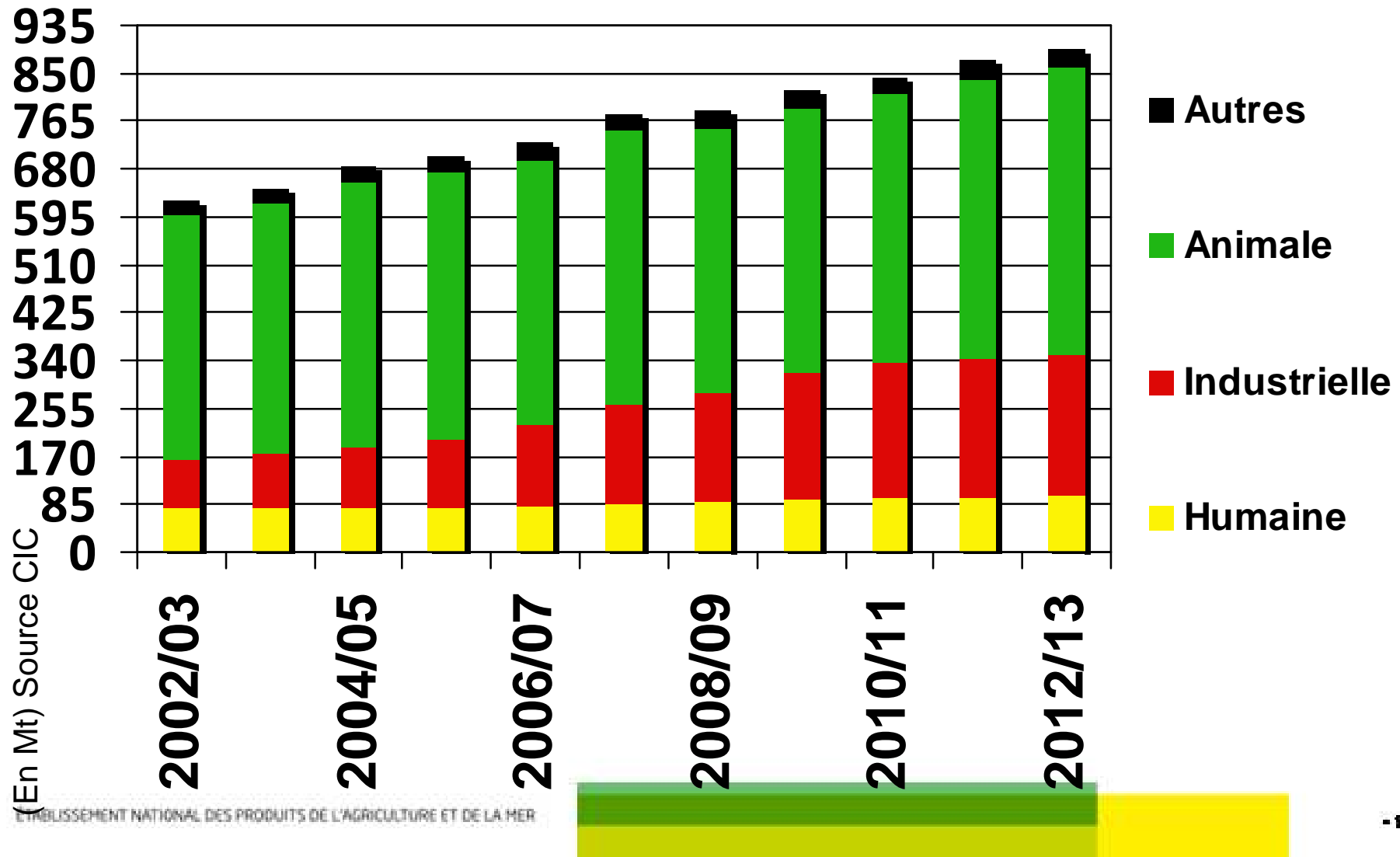


**Stocks mondiaux +7 Mt**

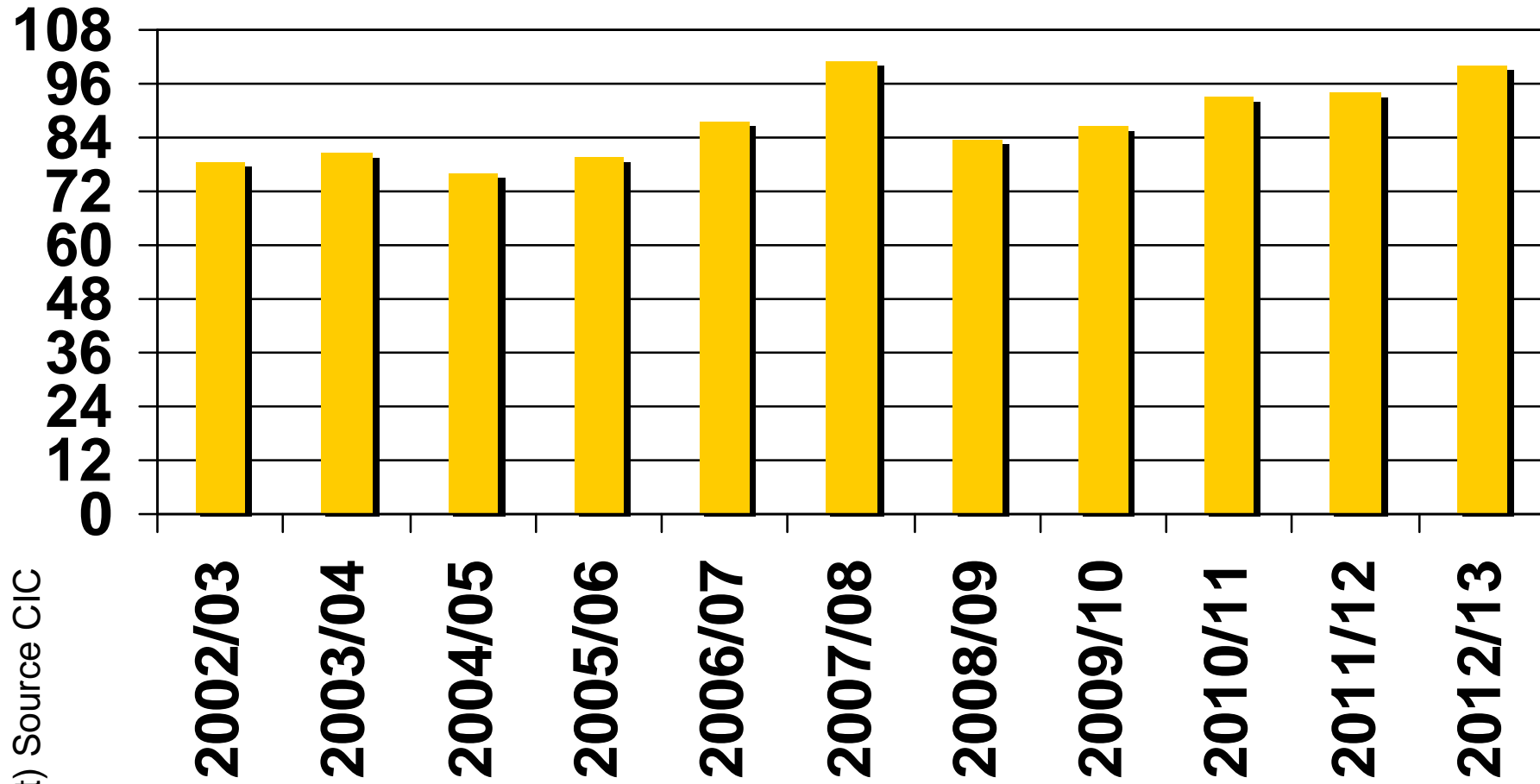


Source USDA

# Consommation mondiale de maïs 2012/13

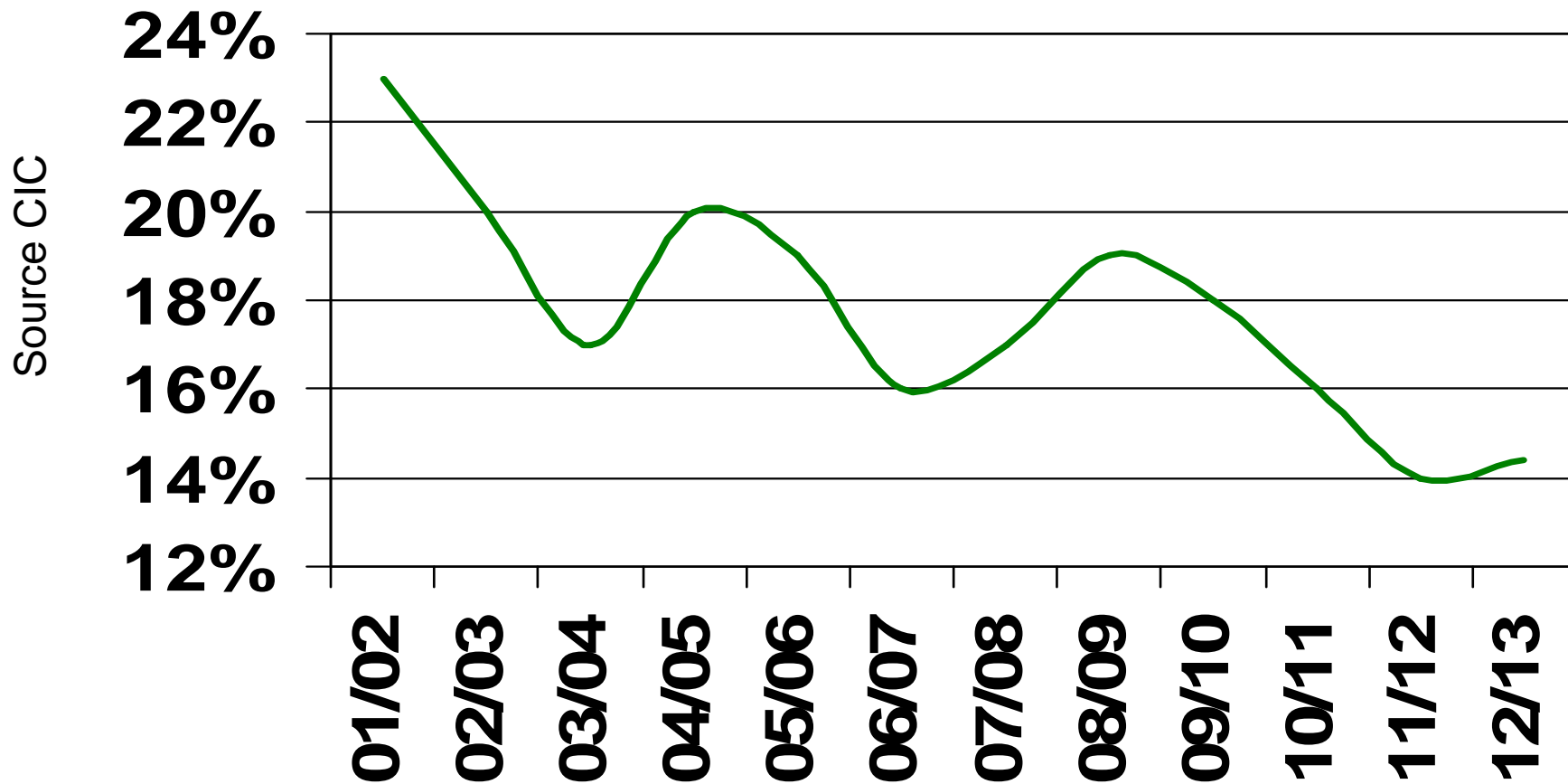


# Commerce mondial du maïs



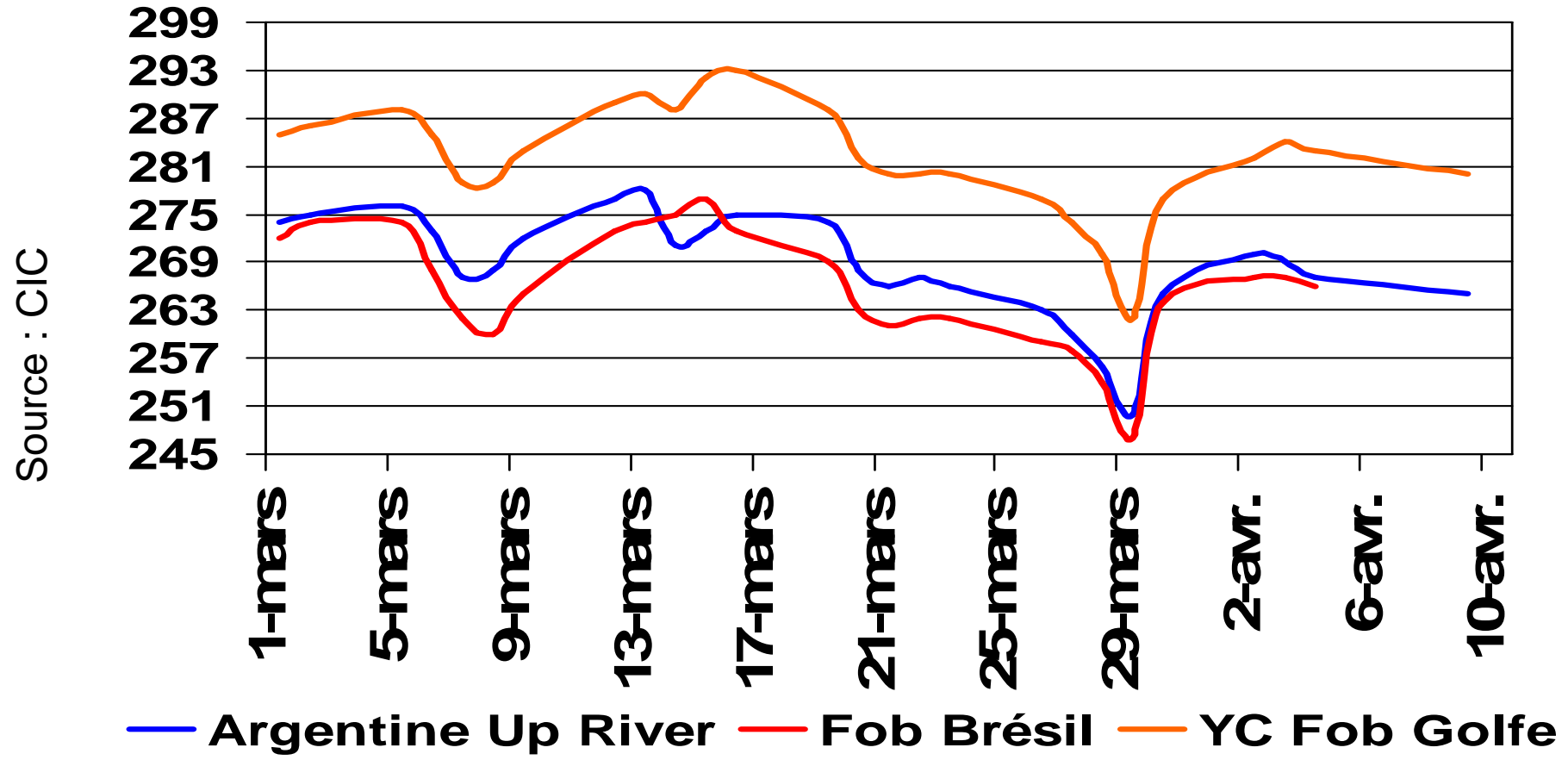
(En Mt) Source CIC

## Ratio stocks sur consommation du maïs



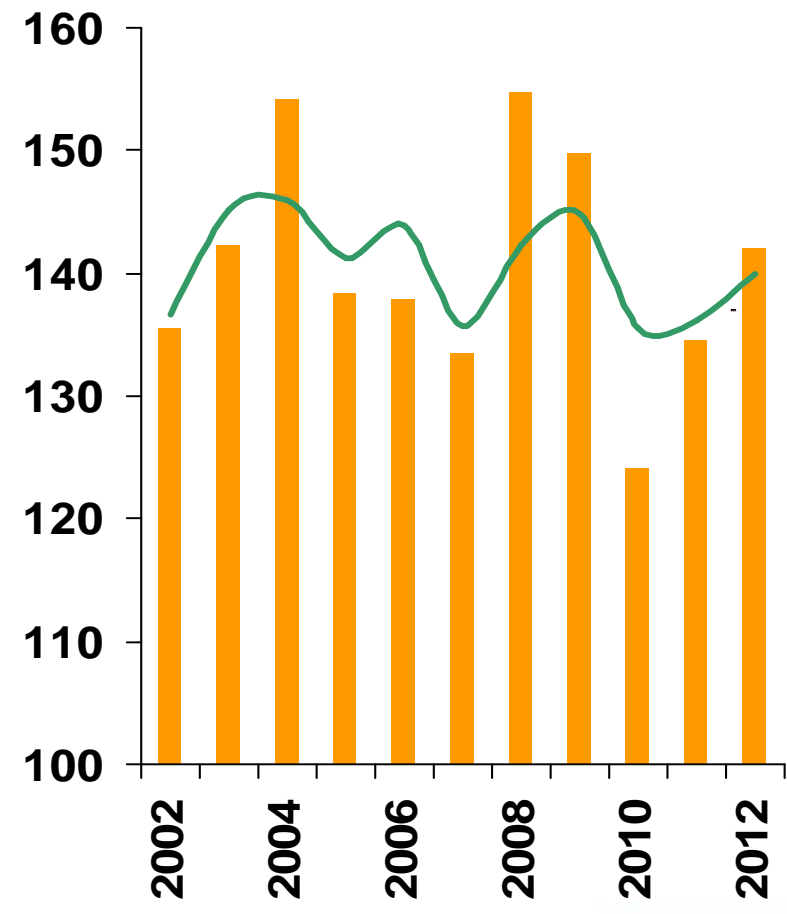


# Cours mondial du maïs

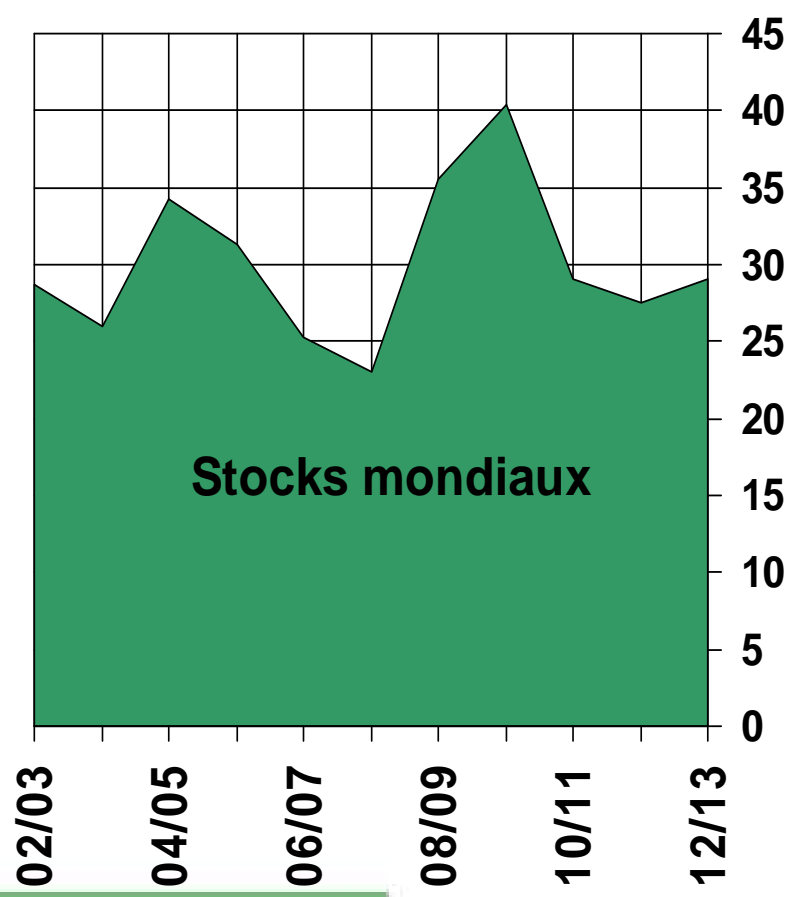


# Bilan mondial de l'orge

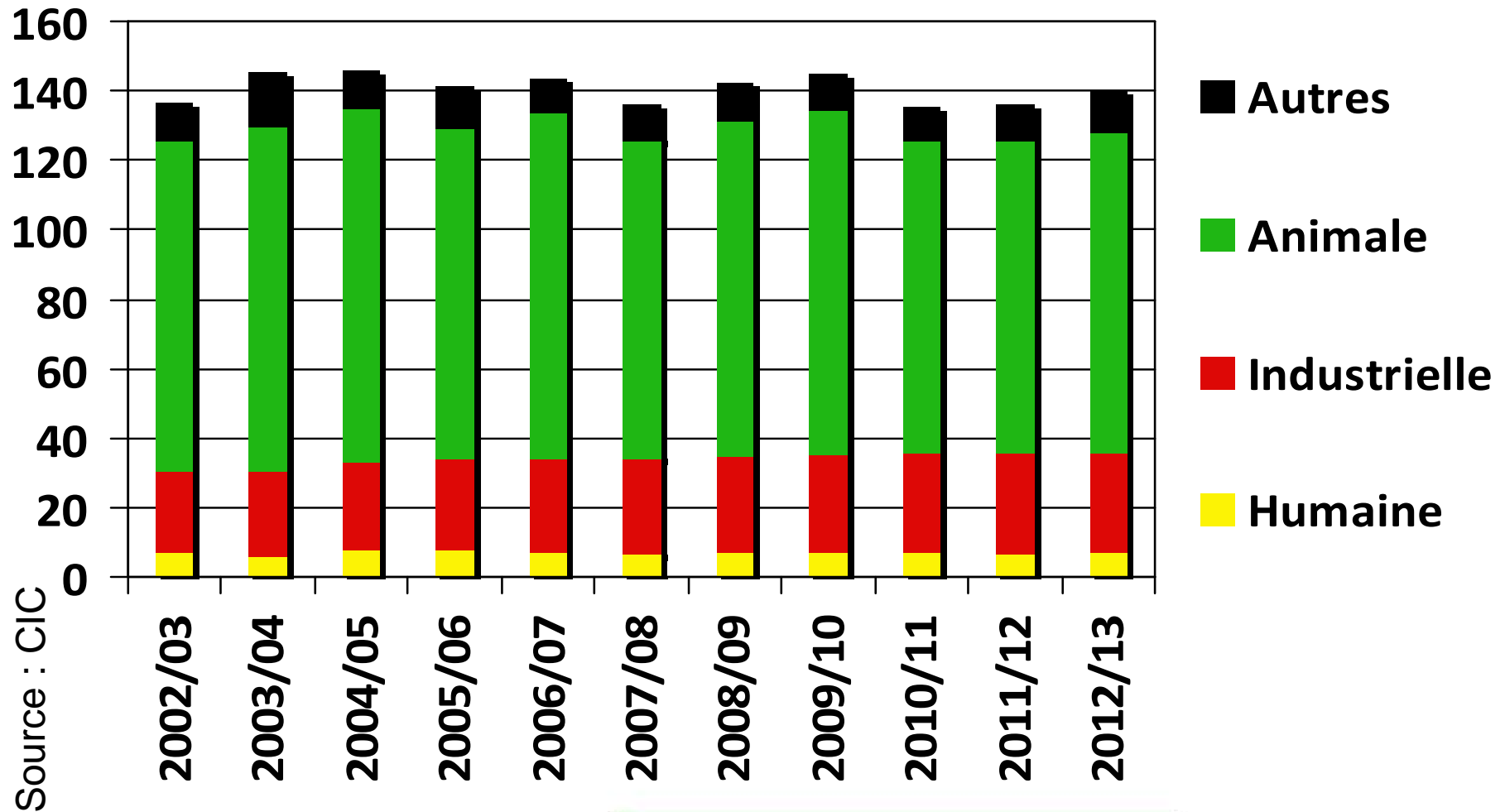
Production — Consommation



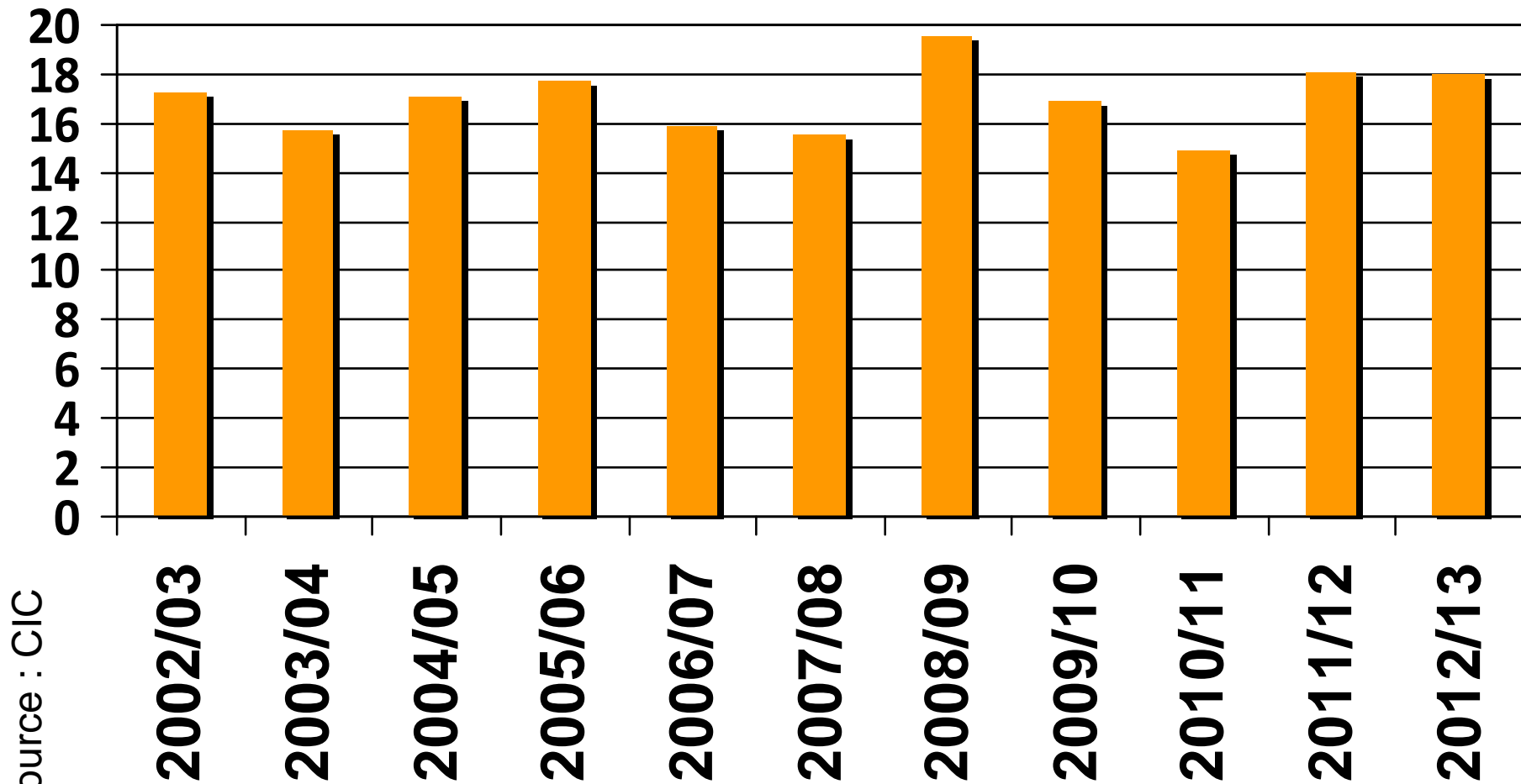
Stocks mondiaux +1 Mt



## Consommation mondiale d'orge 2012/13

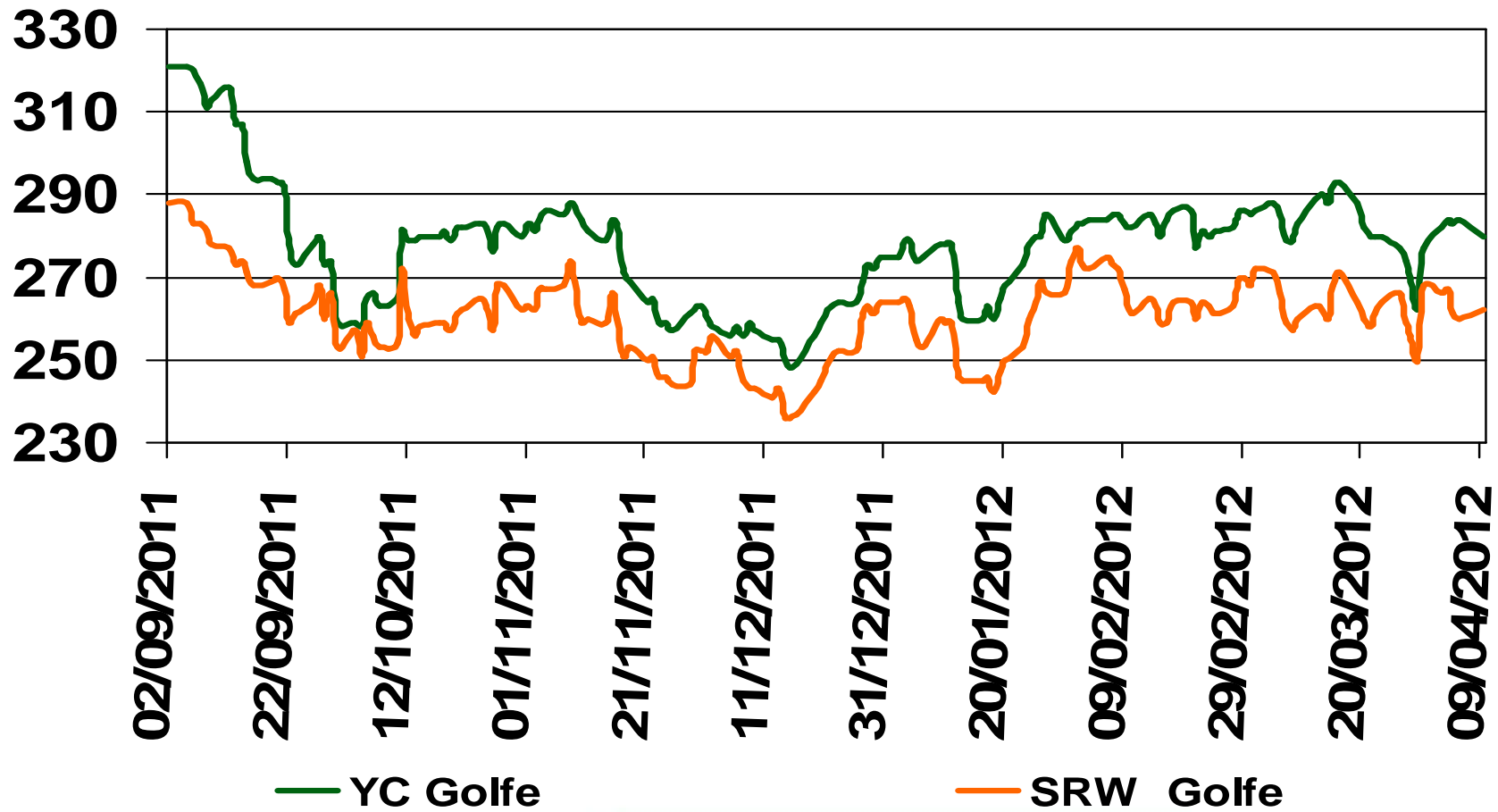


## Commerce mondial de l'orge



Source : CIC

## Evolution des prix du maïs et du blé aux Etats unis



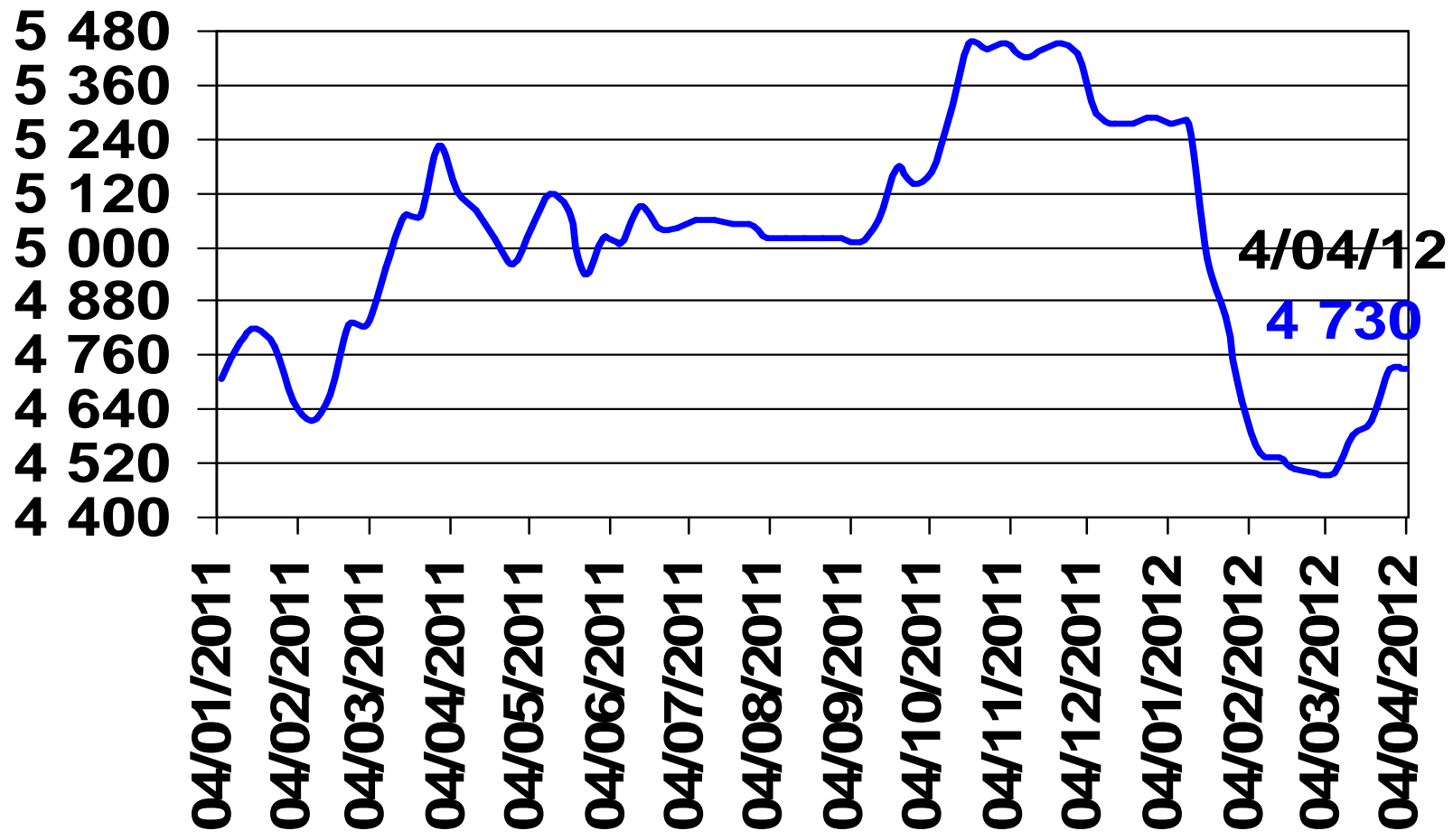
Source : CIC

# Cours du baril de pétrole à New York

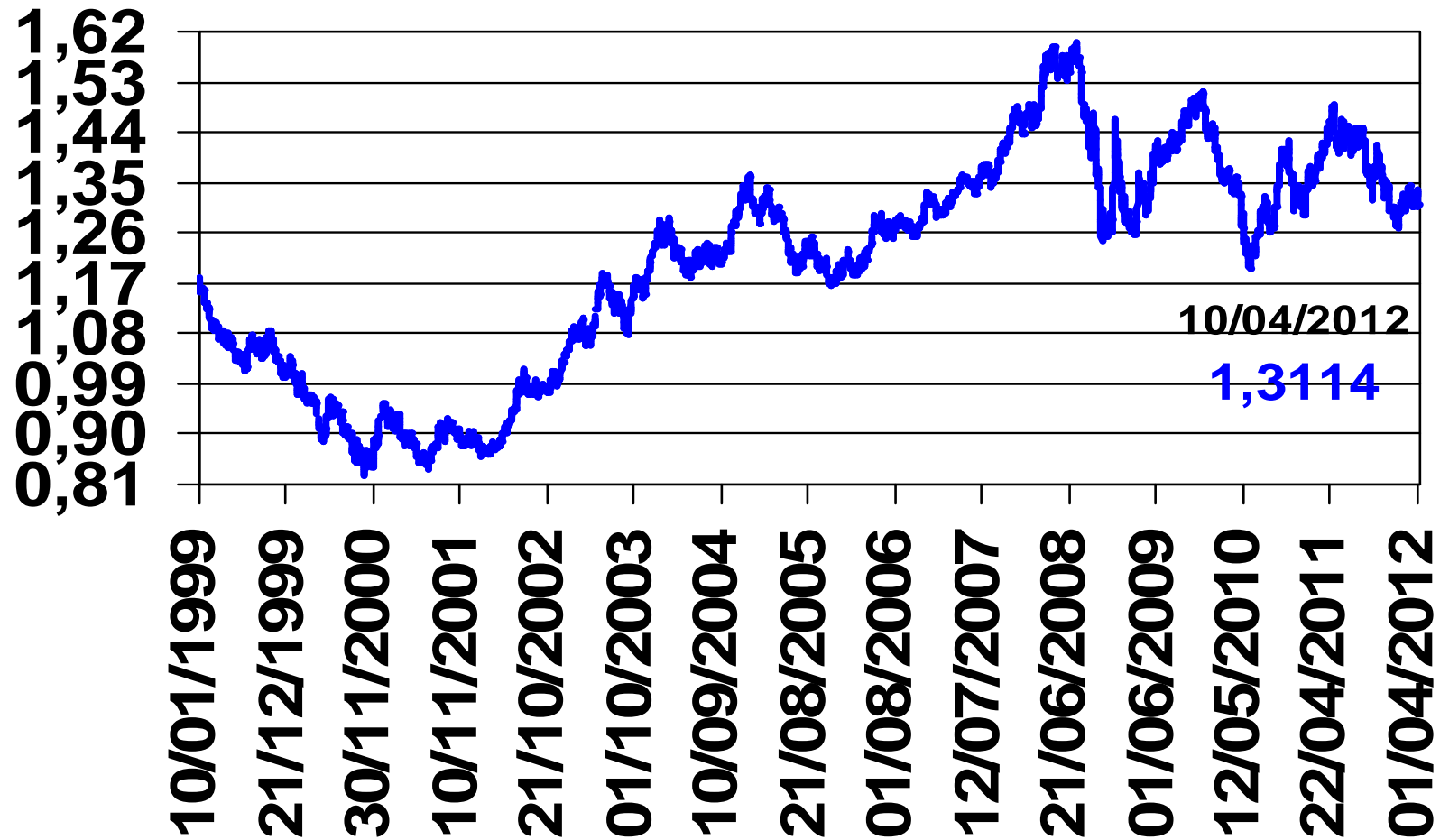


# Indice des frets céréaliers du CIC

Source : CIC/en pts



# Cours du dollar

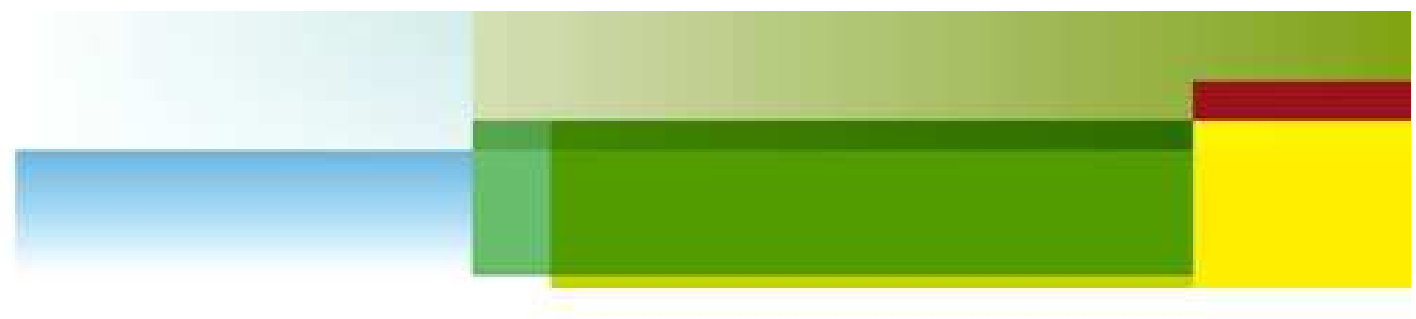


Source : BCE

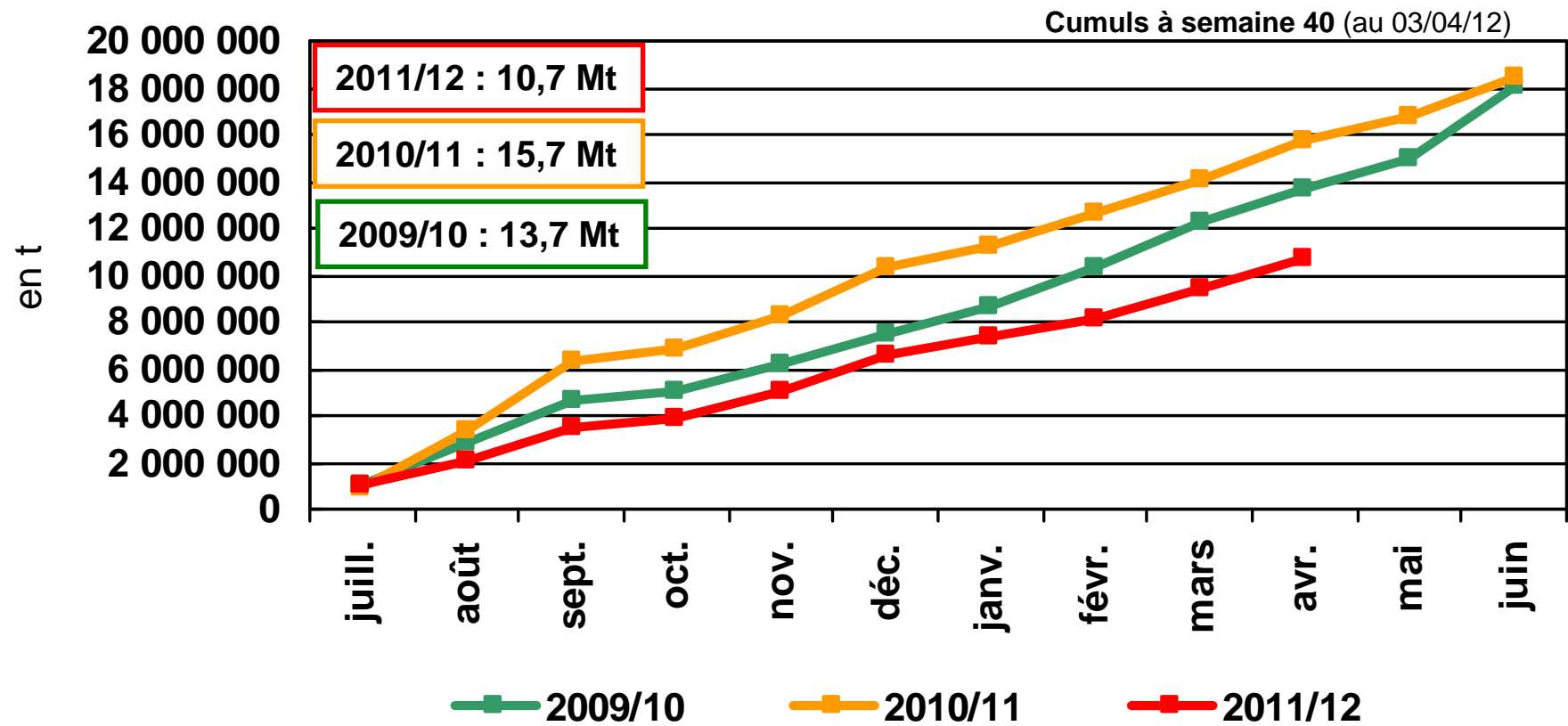




# Marché européen



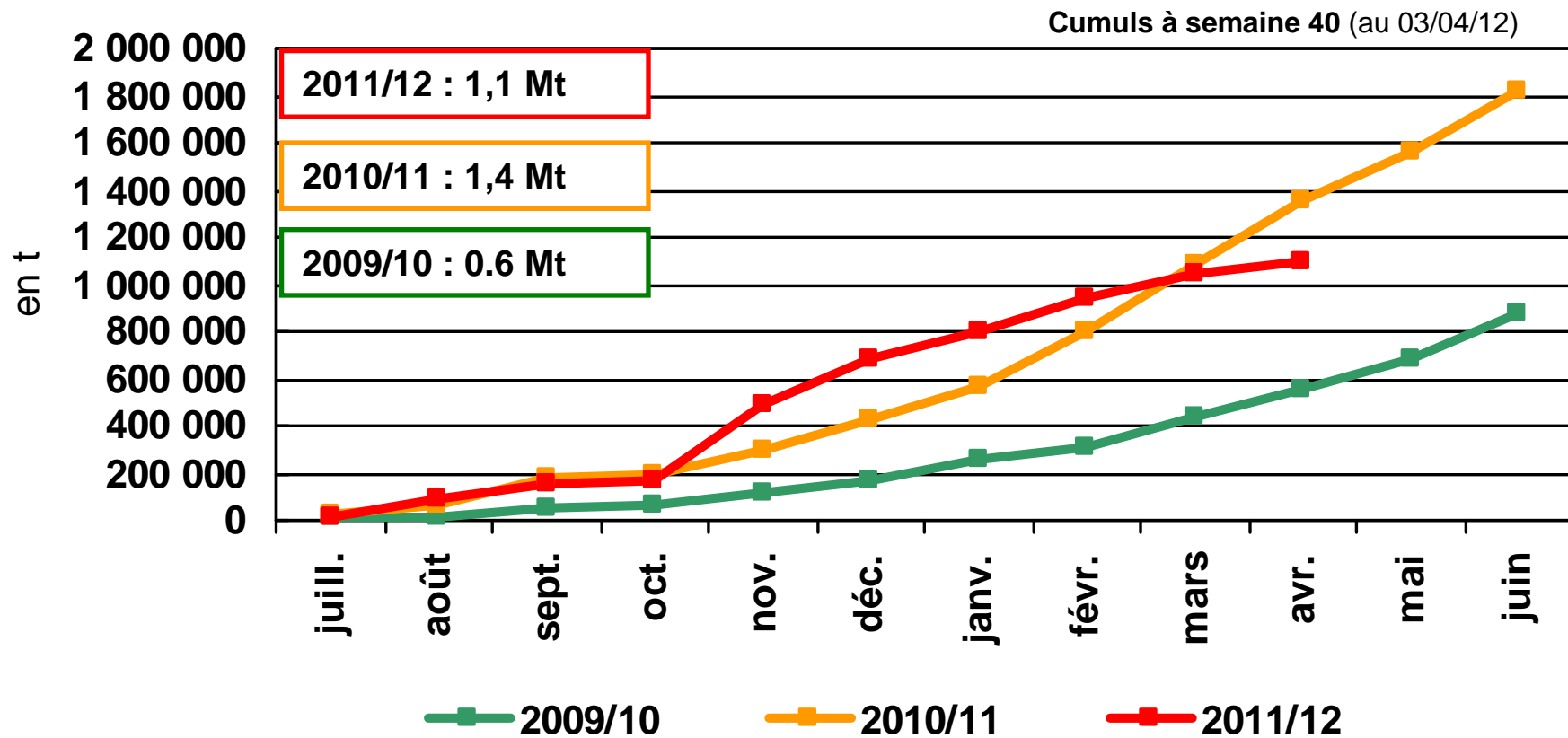
## Blé tendre : certificats à l'exportation délivrés dans l'UE



Source : Commission européenne

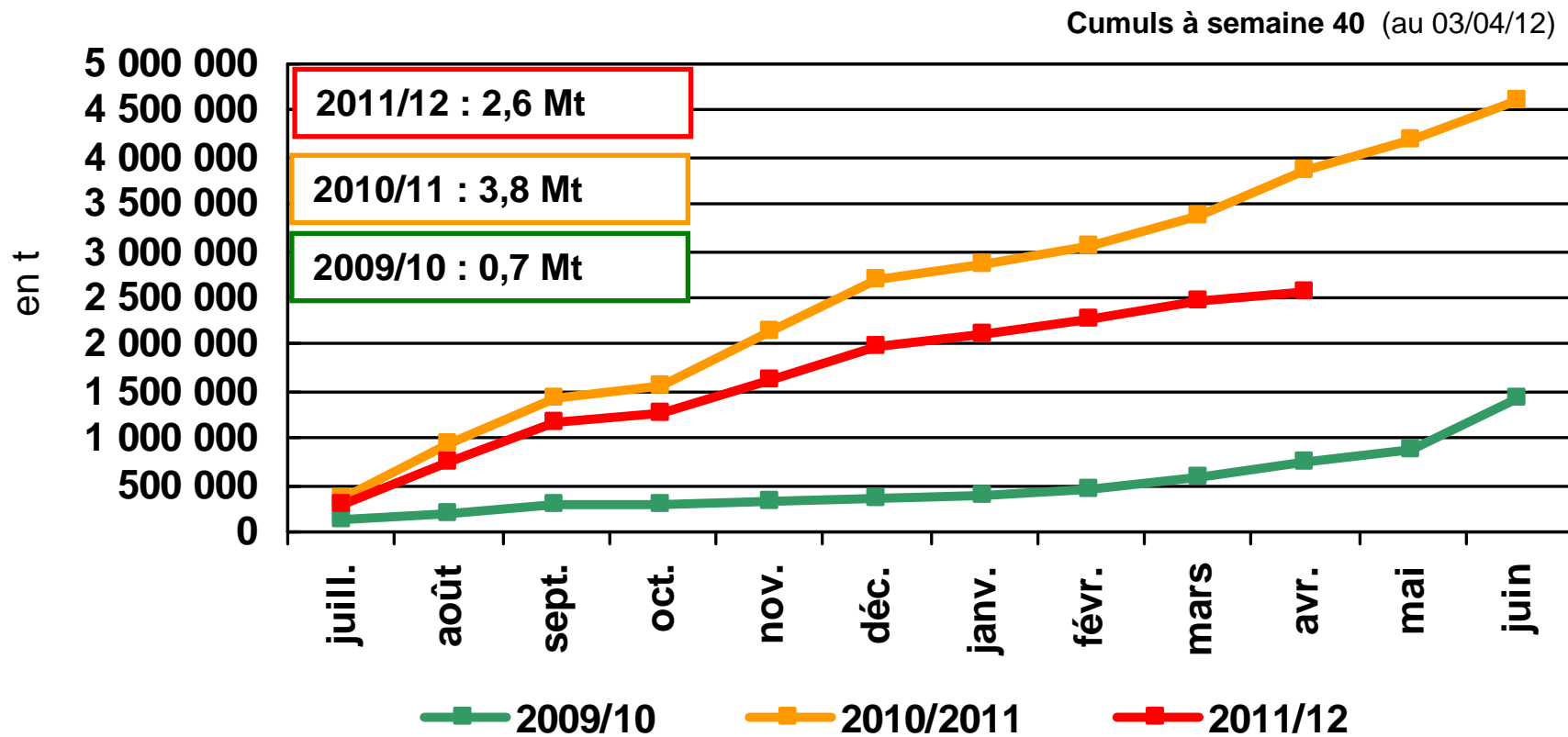


## Blé dur : certificats à l'exportation délivrés dans l'UE

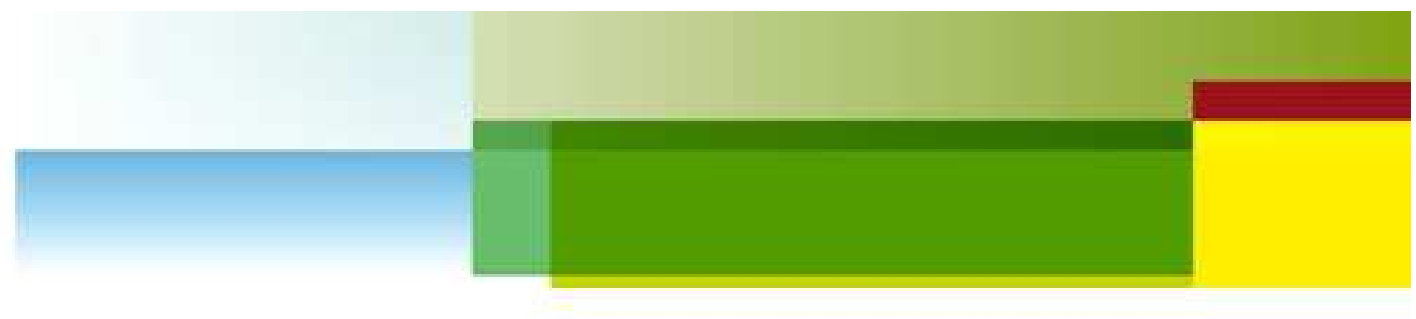


Source : Commission européenne

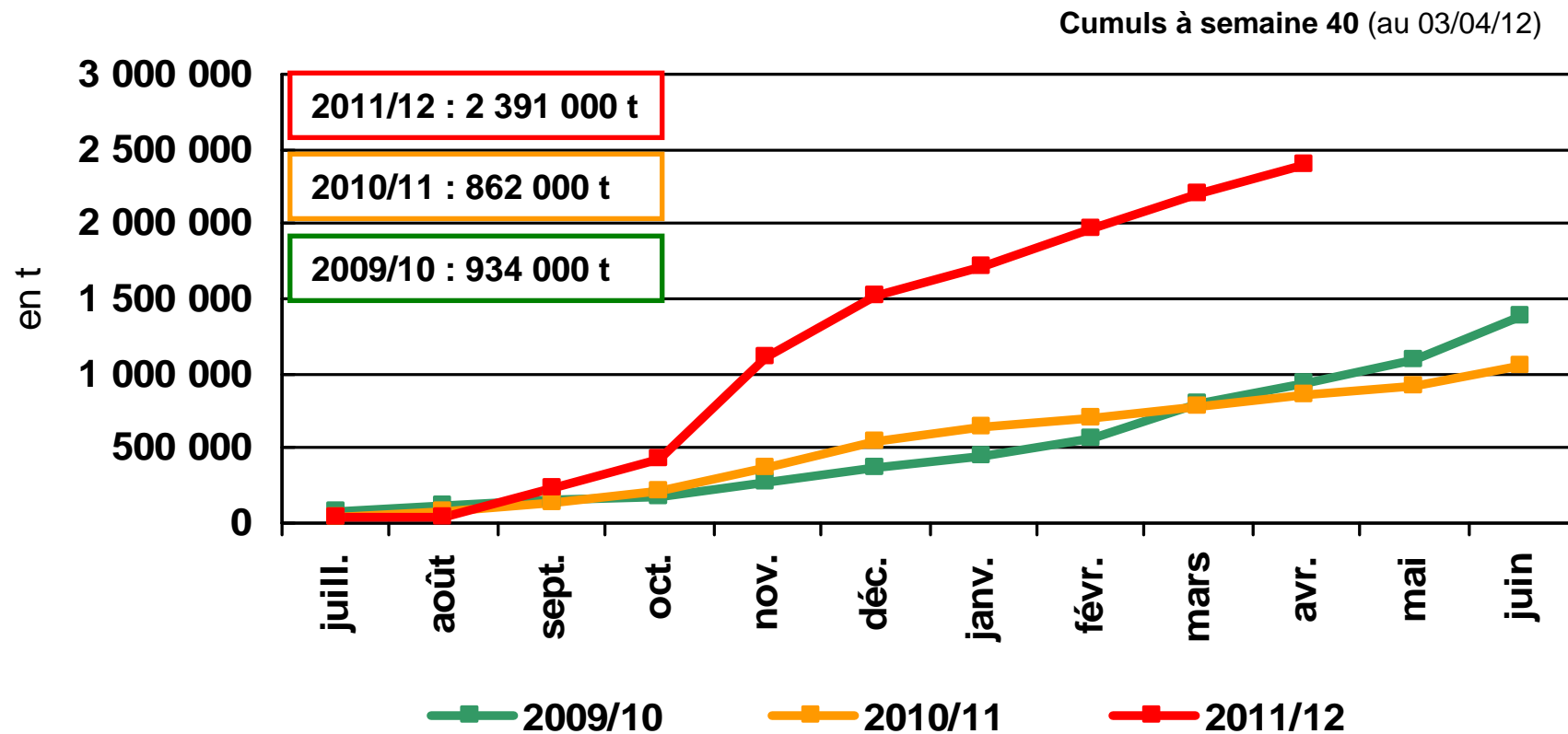
## Orge : certificats à l'exportation délivrés dans l'UE



Source : Commission européenne



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

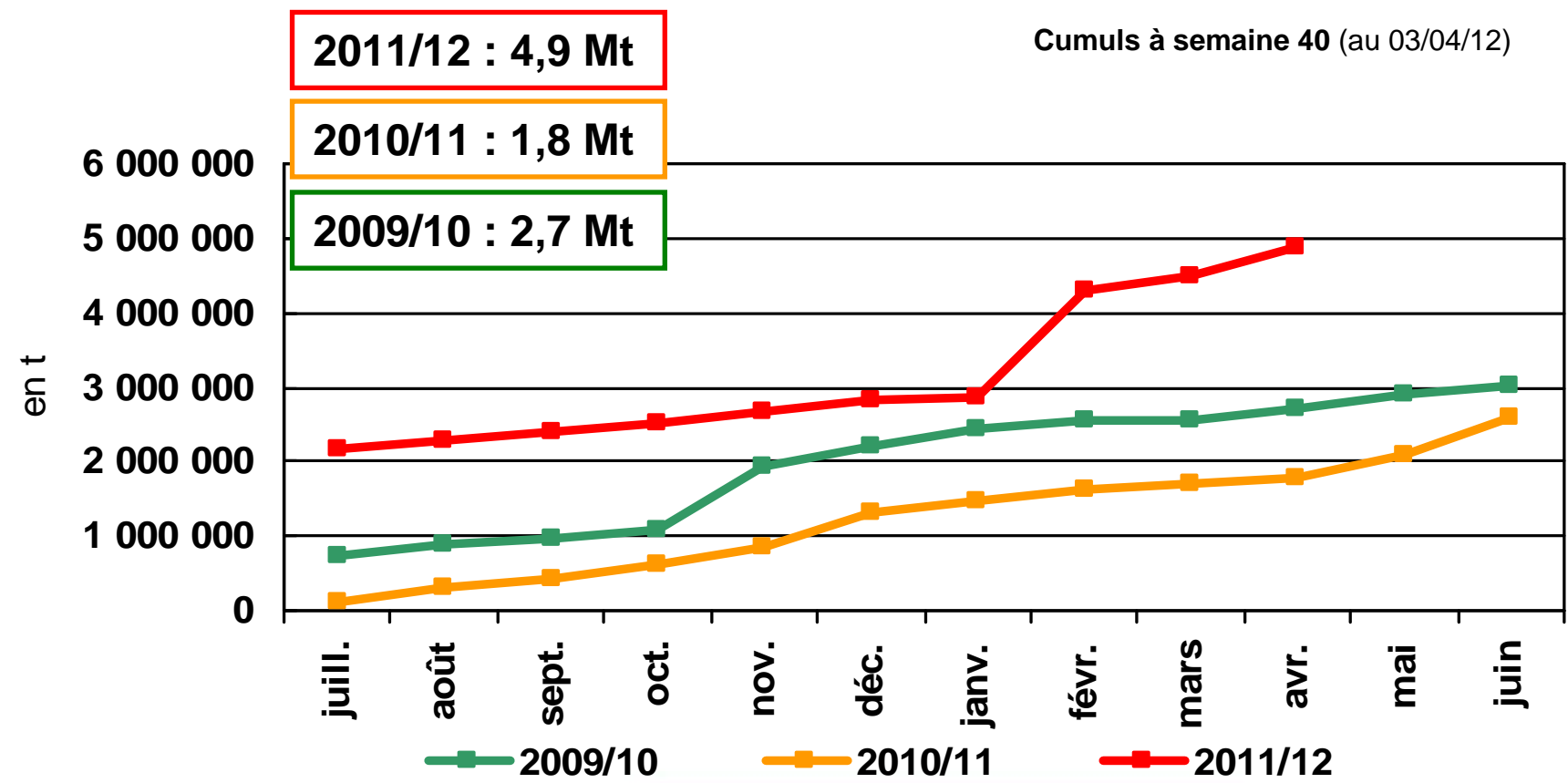


Source : Commission européenne

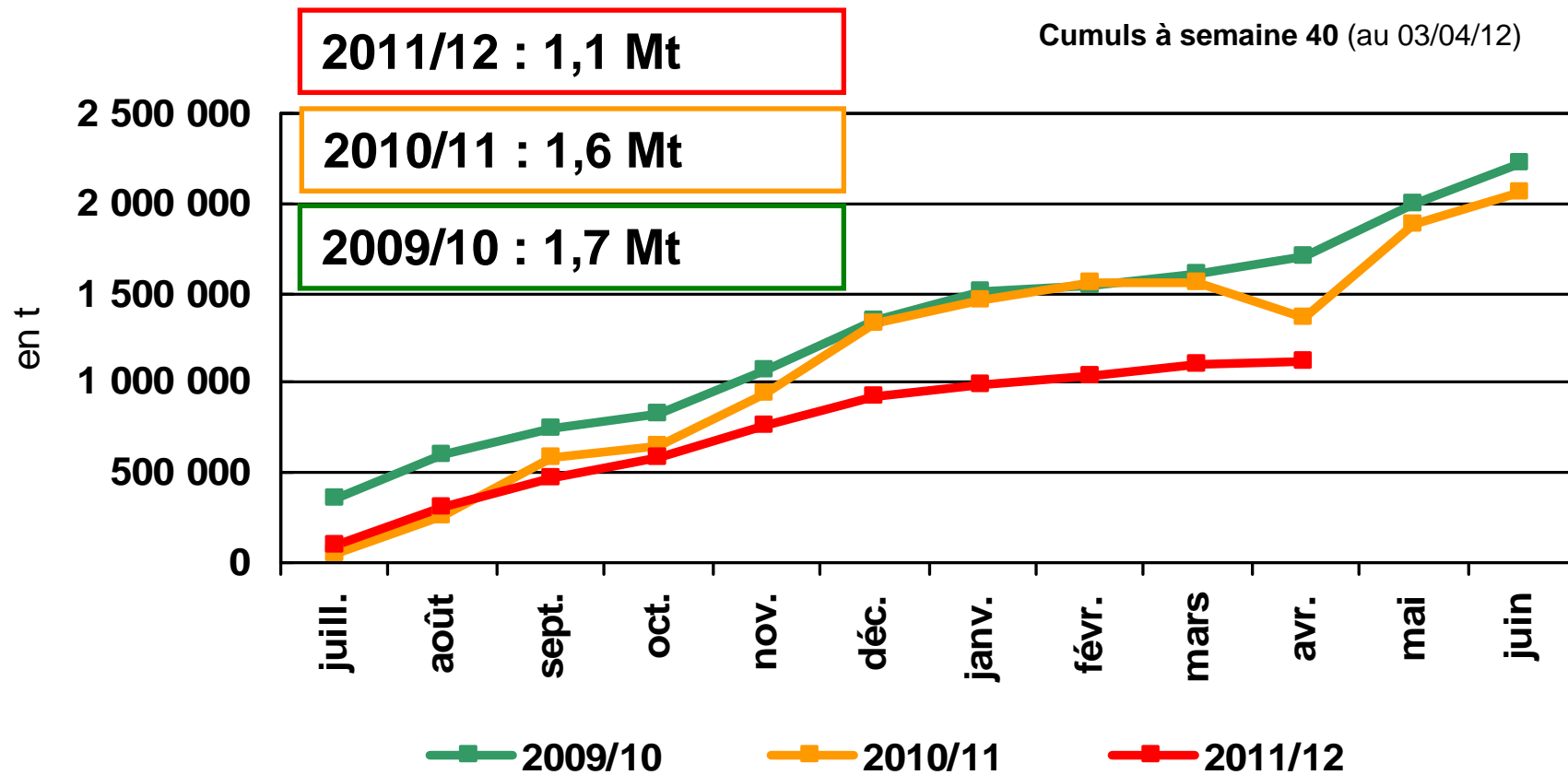




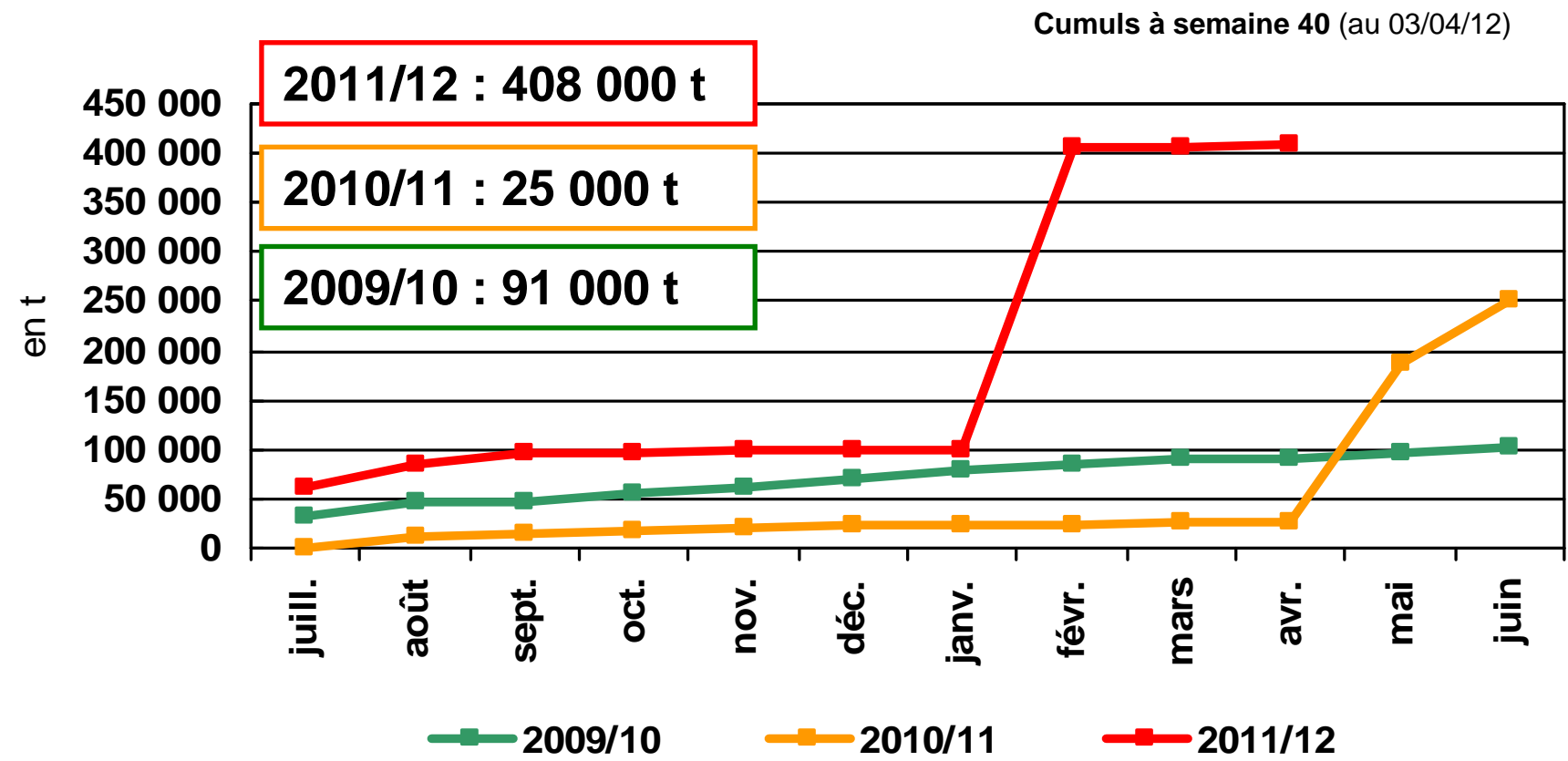
## Blé tendre : certificats à l'importation délivrés dans l'UE



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



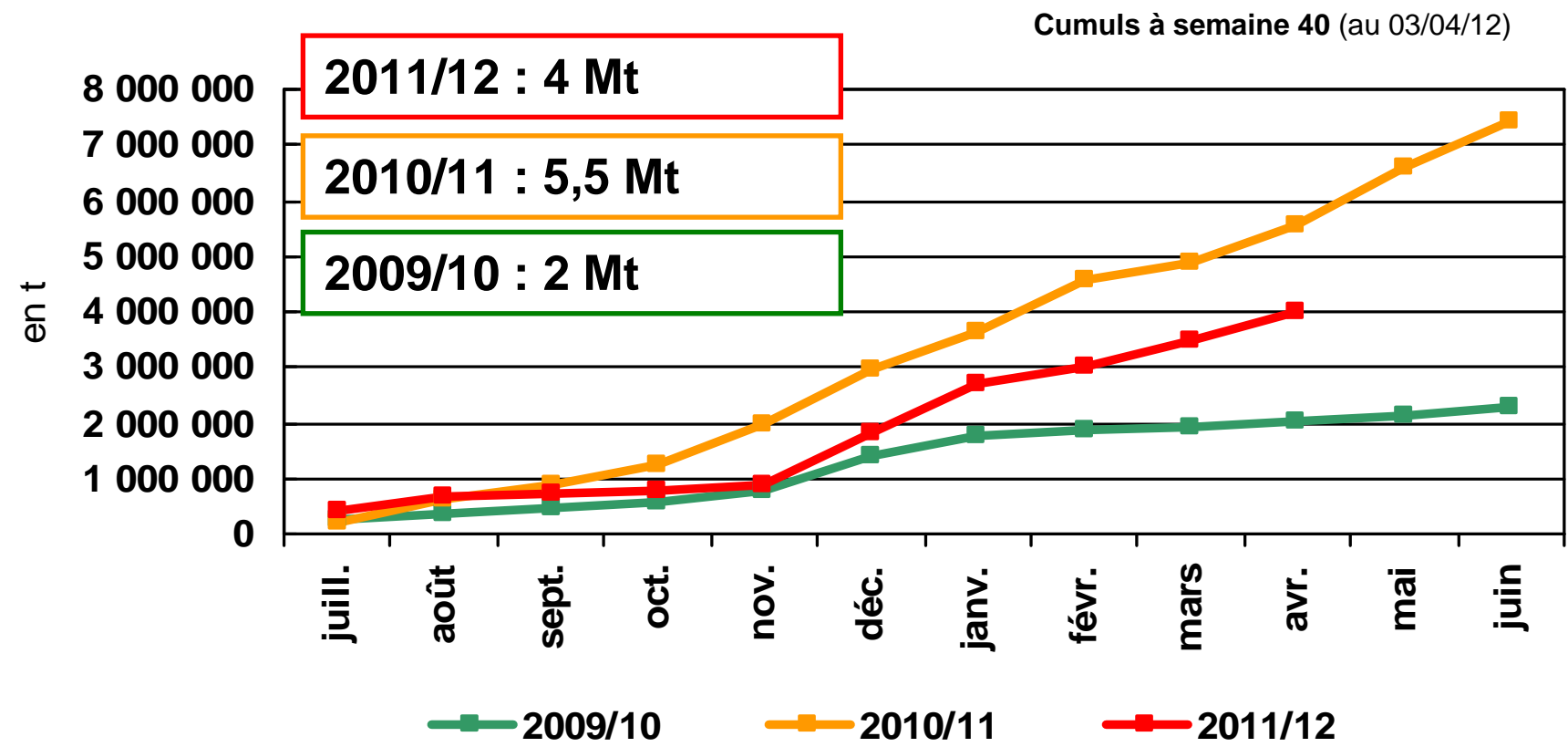
## Orge : certificats à l'importation délivrés dans l'UE





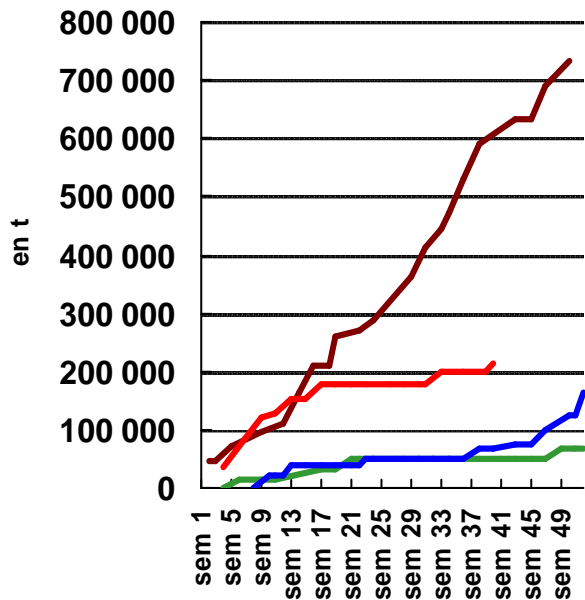


## Maïs : certificats à l'importation délivrés dans l'UE

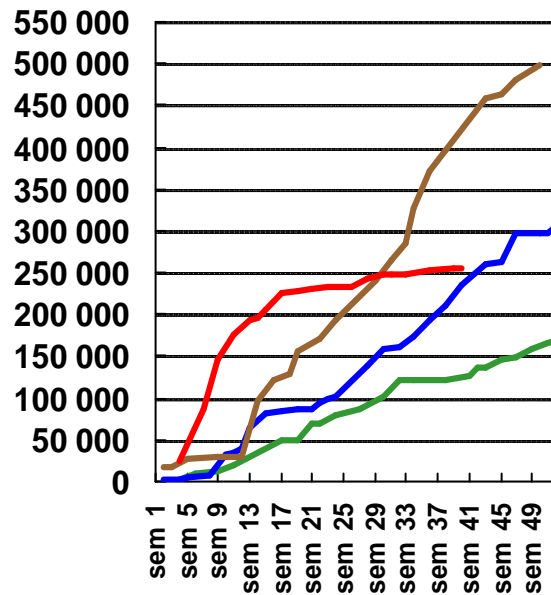


# Imports de PSC : Certificats tirés depuis le début de campagne

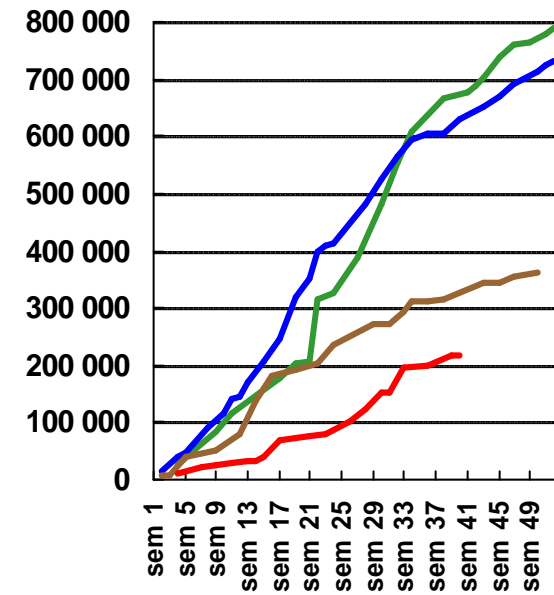
Corn gluten feed



Drèches de brasserie



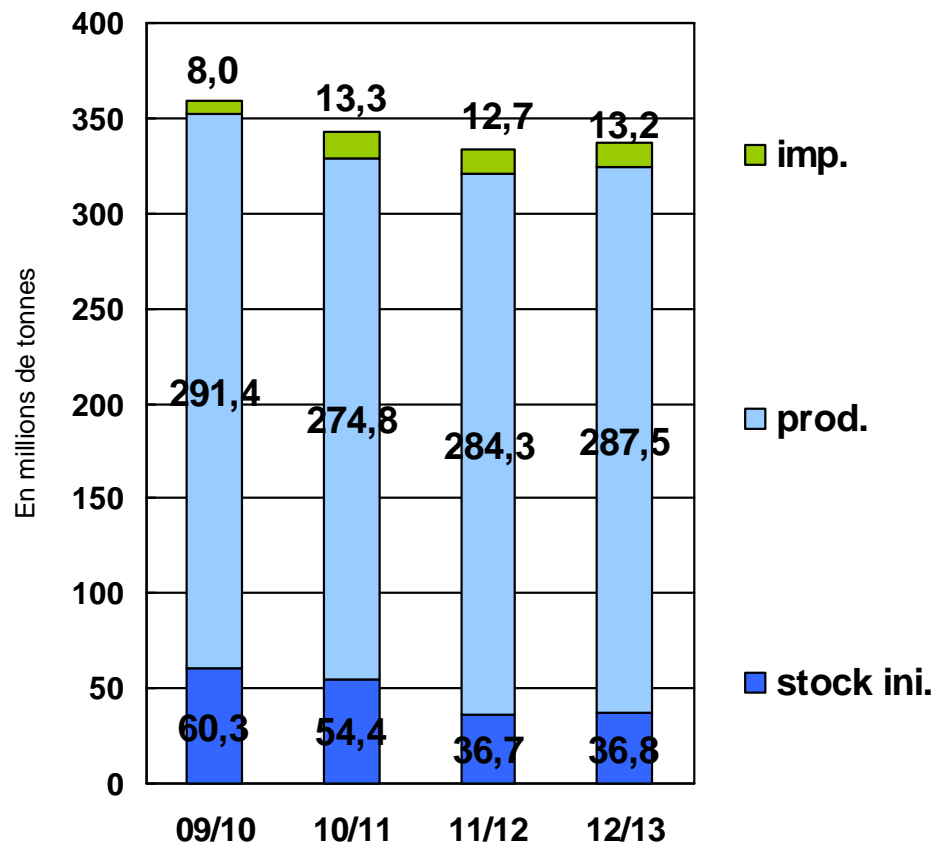
Pulpes d'agrumes



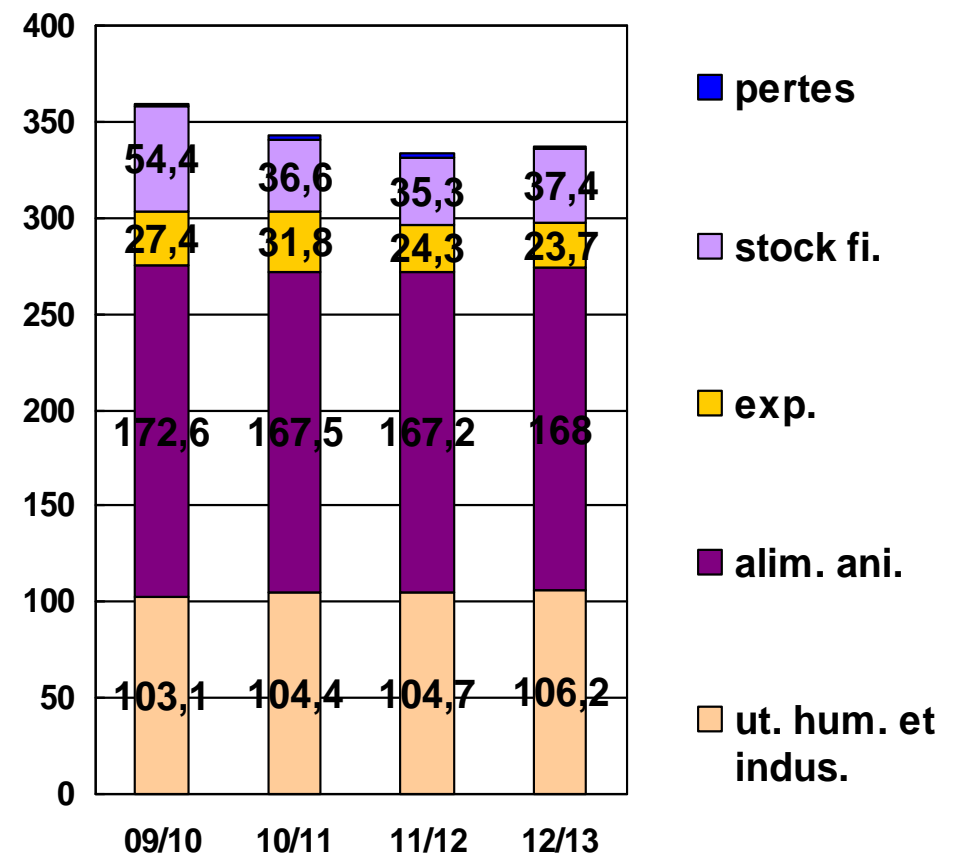
— 2008/09      — 2009/10  
— 2010/11    — 2011/12

# UE - bilan toutes céréales

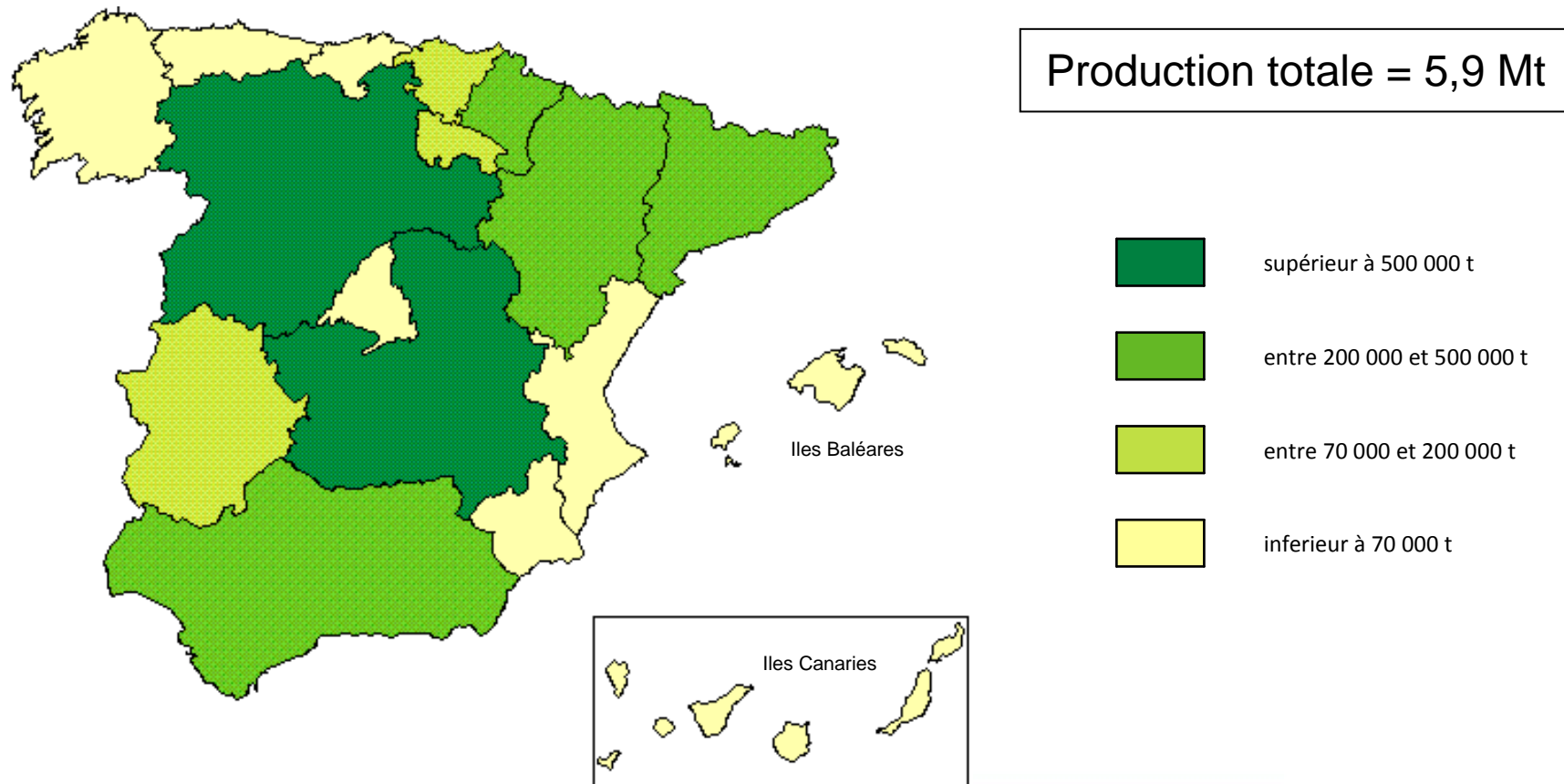
Total dispo 2011/12 : 333,7 Mt



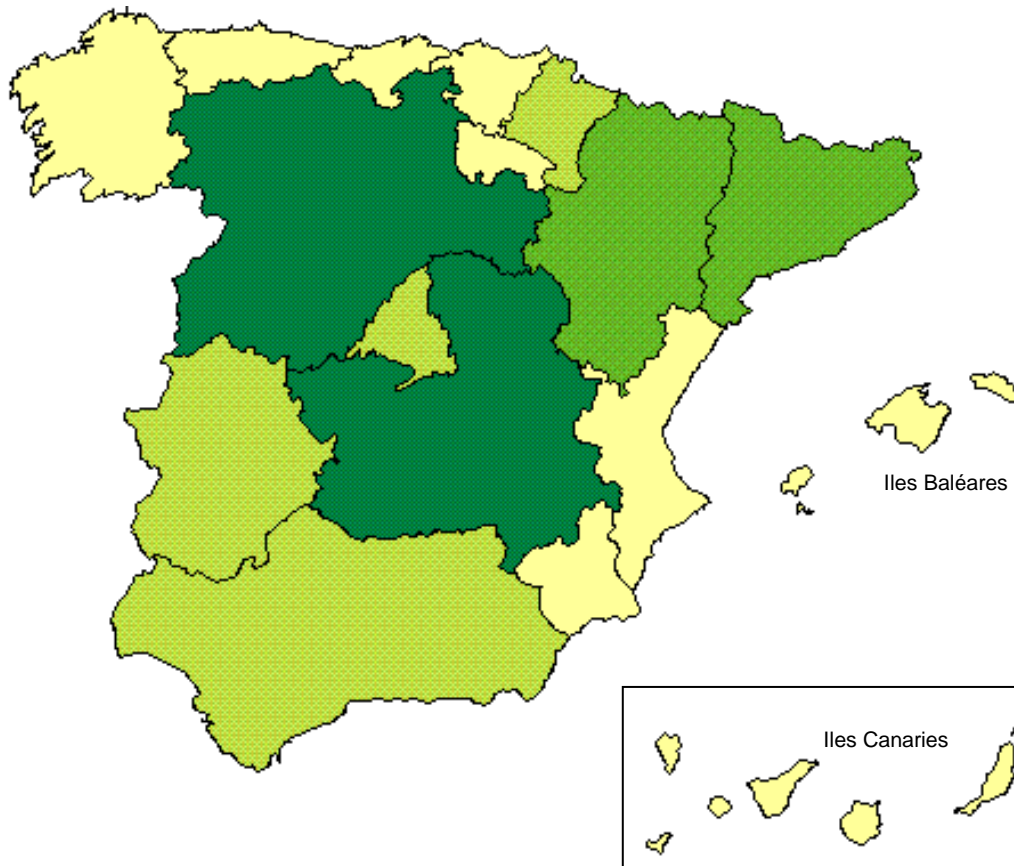
Total utilisation 2011/12 : 333,7 Mt



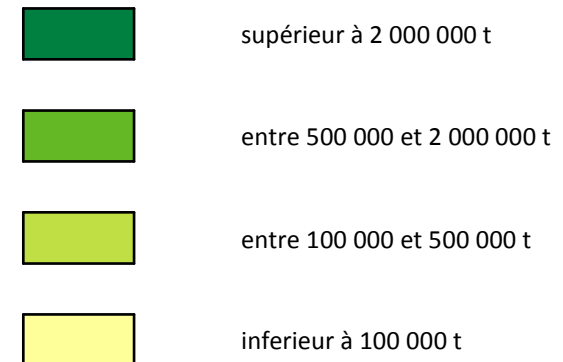
## Localisation de la production de blé tendre en Espagne 2011/12



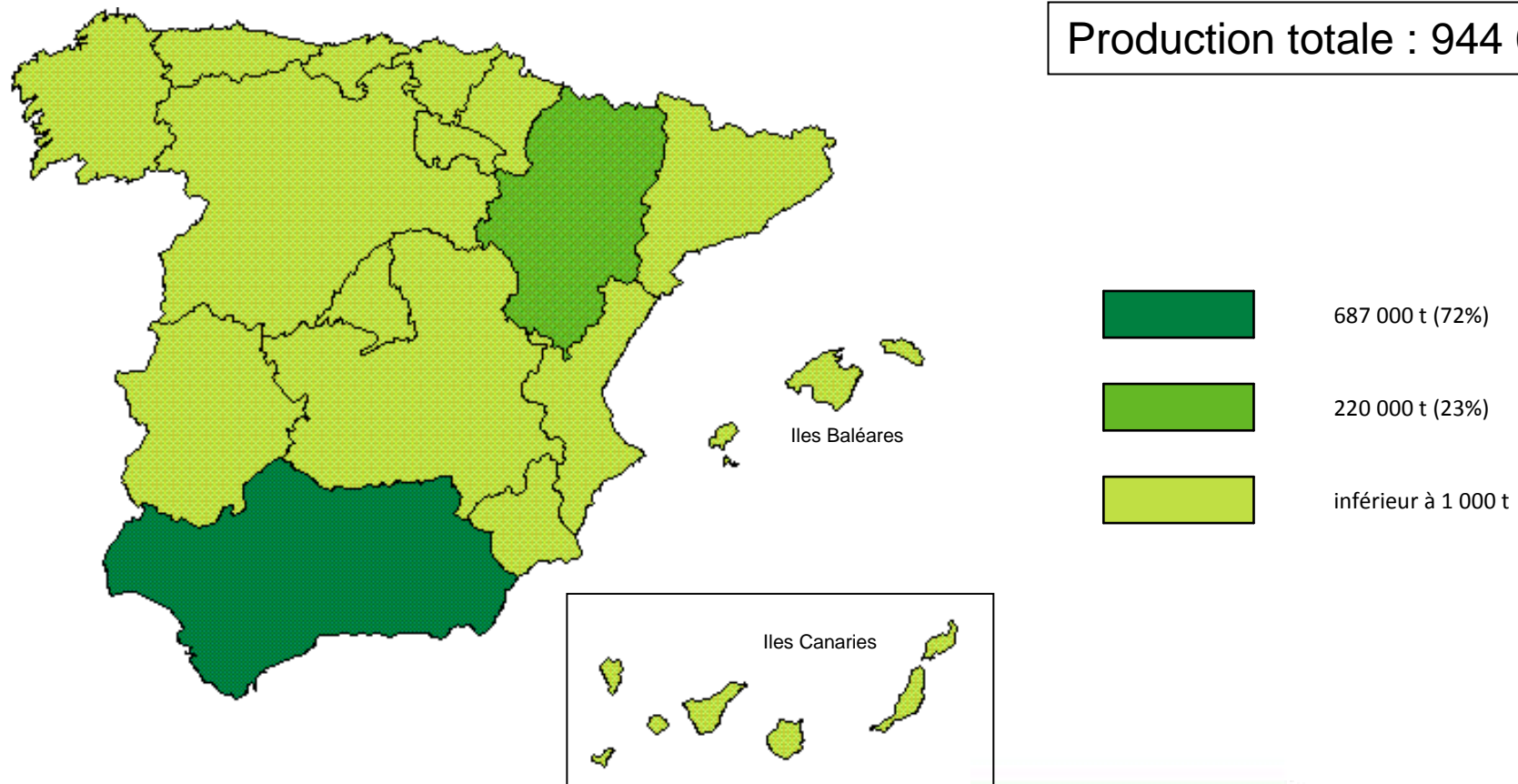
## Localisation de la production d'orge en Espagne 2011/12



Production totale : 8,3 Mt

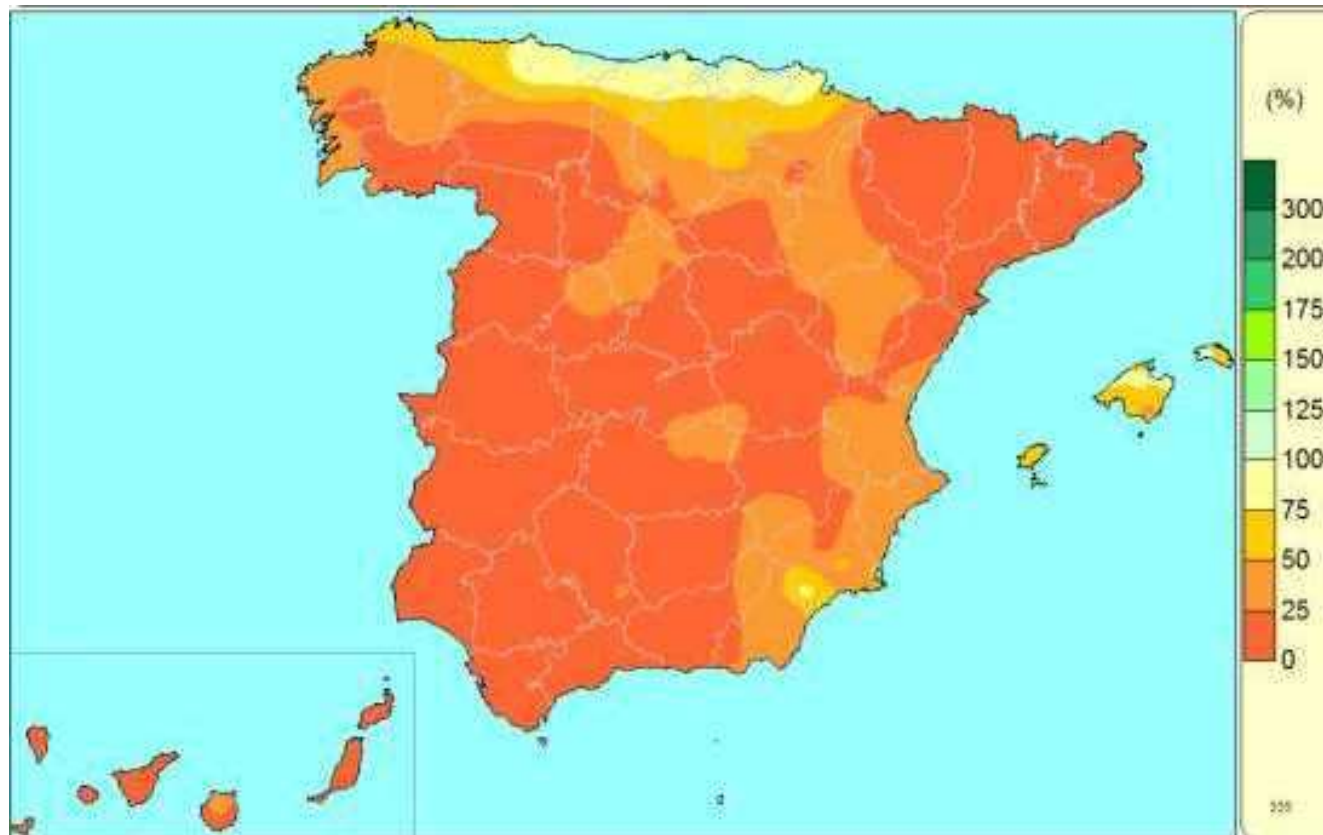


## Localisation de la production de blé dur en Espagne 2011/12

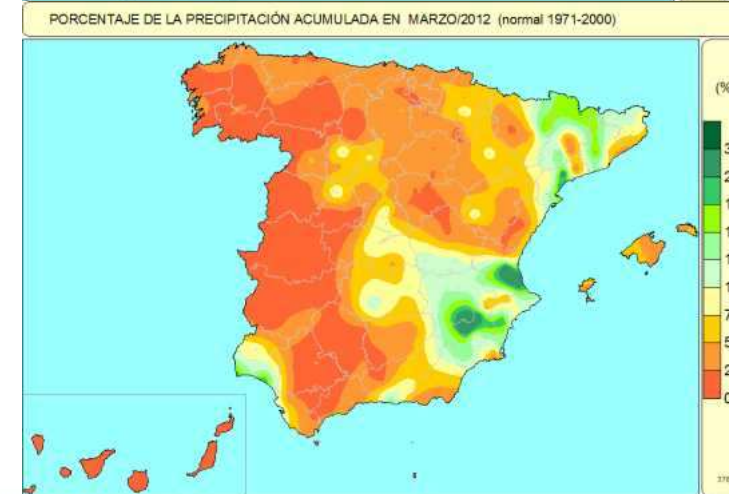
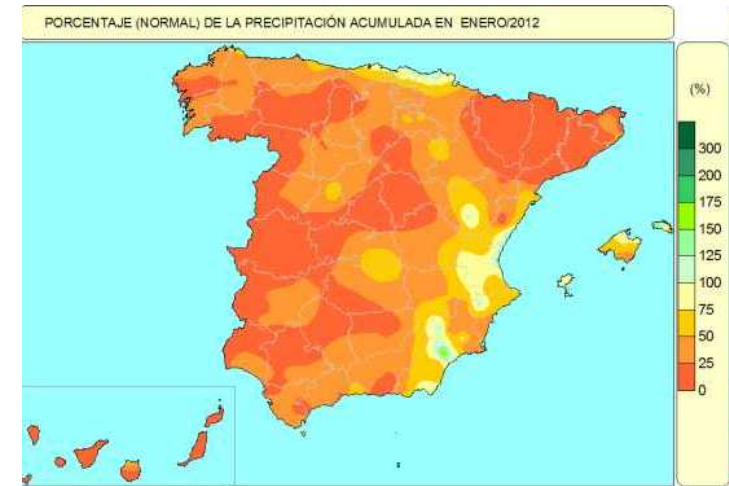
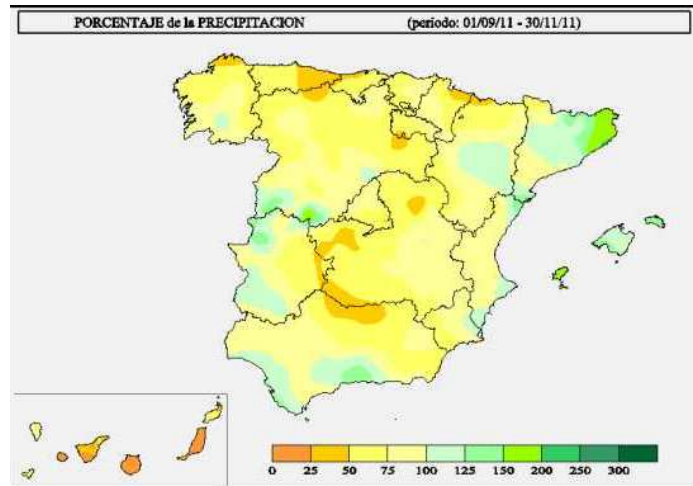


## Le déficit pluviométrique progresse à mesure que la saison (campagne) avance

*Pourcentage de précipitation accumulée du 01 dec. 2011 au 29 fev. 2012 (normale 1971-2000)*

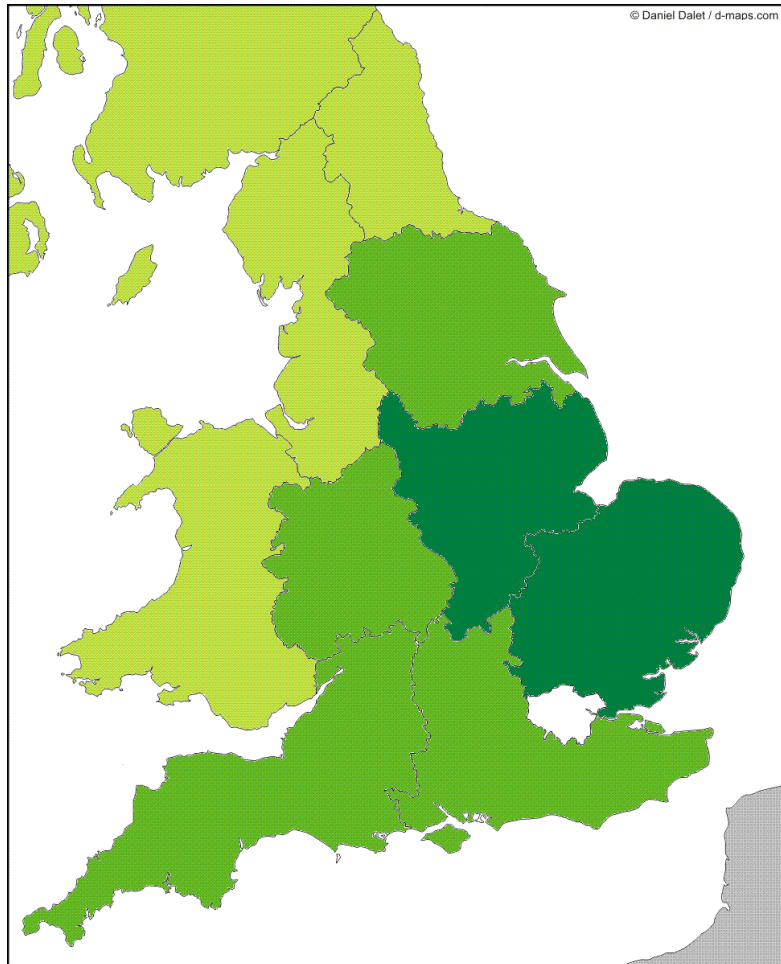


# Les précipitations sur la péninsule ibérique en dessous de la normale





# Production de blé au Royaume-Uni 2011/12



Production totale : 15,3 Mt

- East Midlands = 19%
- Eastern = 24%



Supérieur à 2 Mt

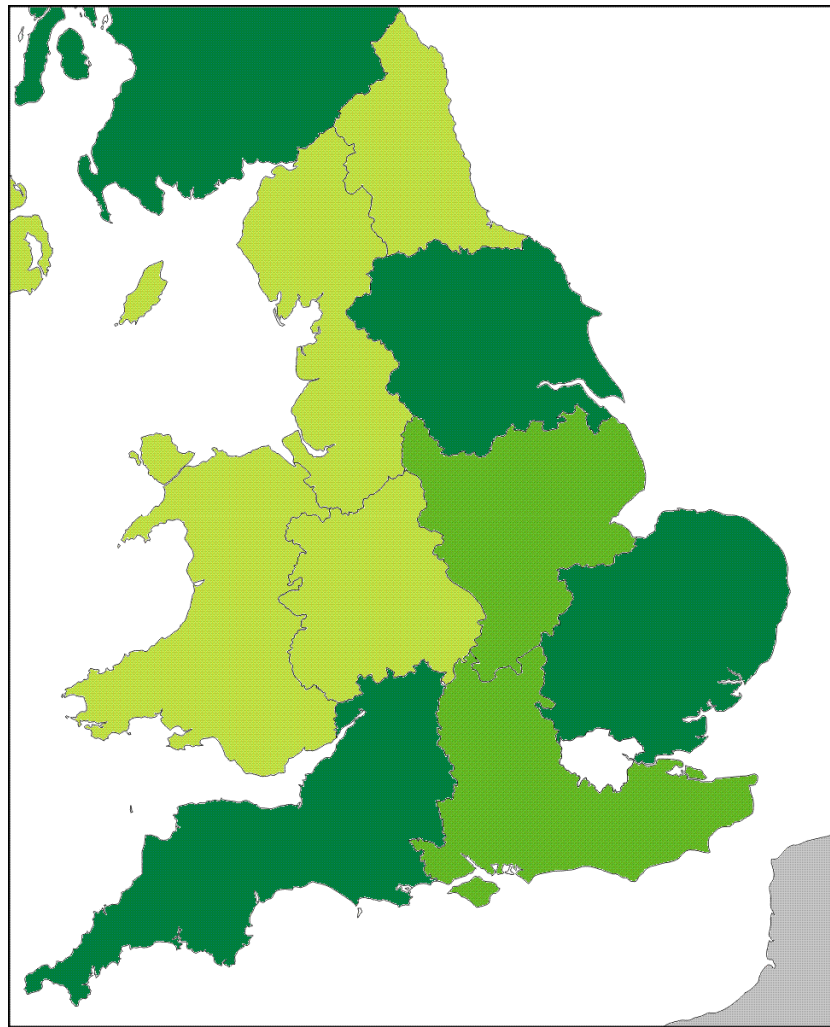


Entre 1 Mt et 2 Mt

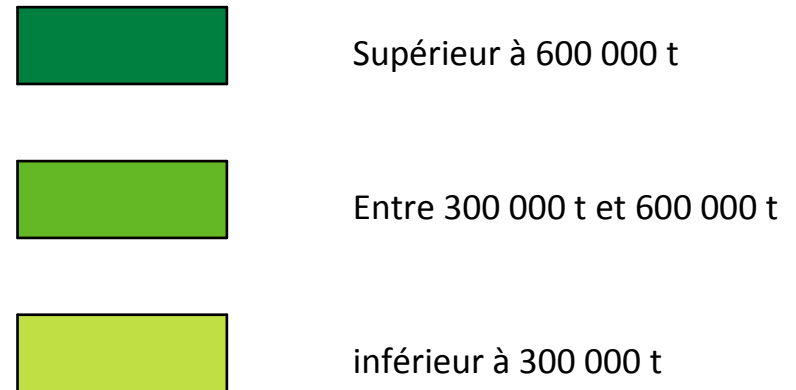


inférieur à 1 Mt

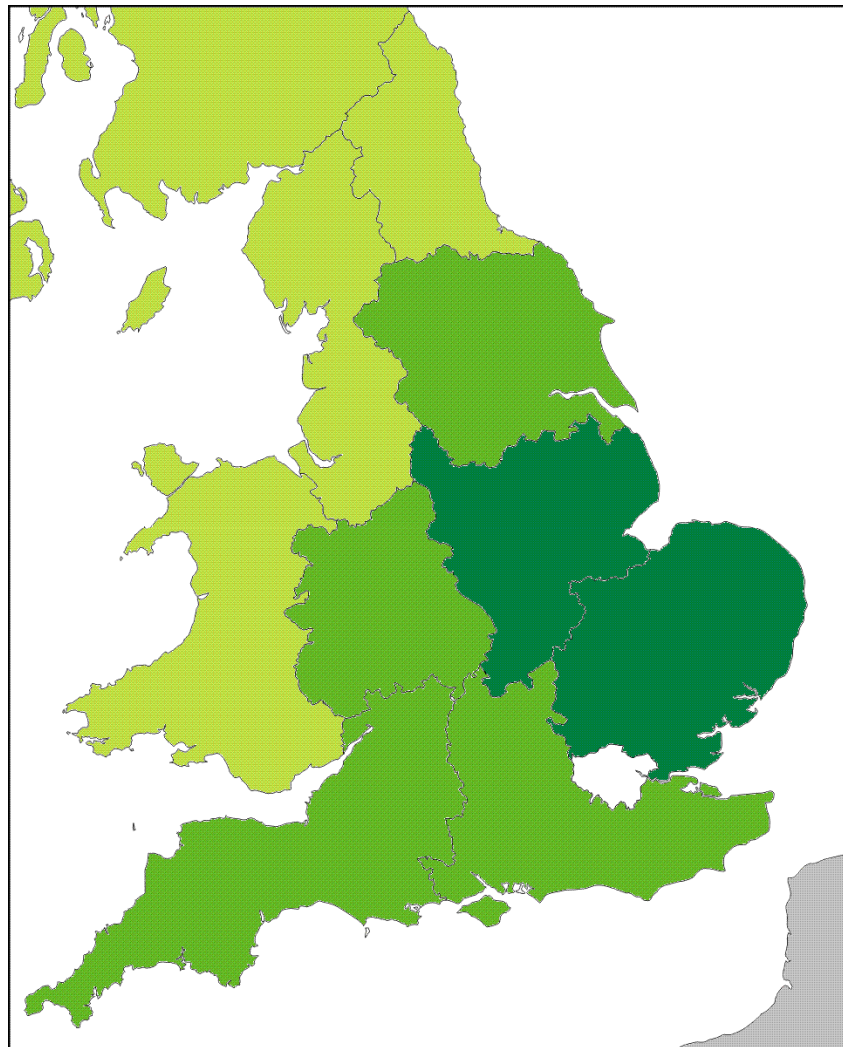
# Production d'orge au Royaume-Uni 2011/12



Production totale : 5,5 Mt

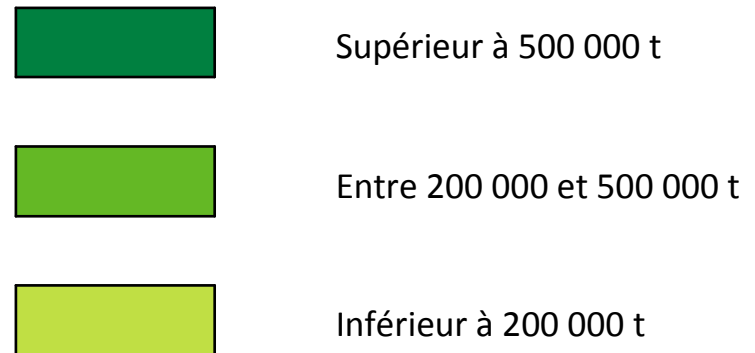


# Production de colza au Royaume-Uni 2011/12

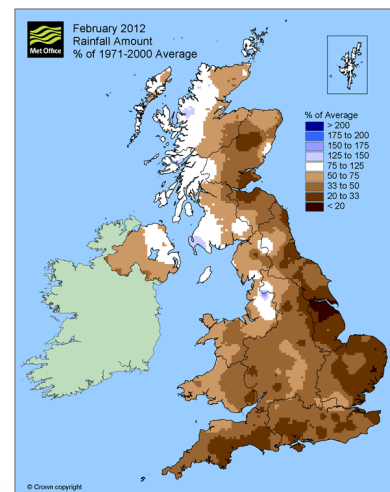
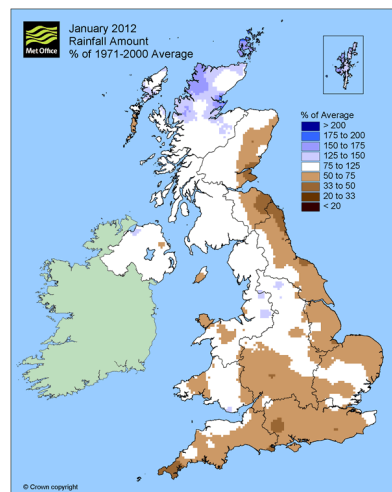
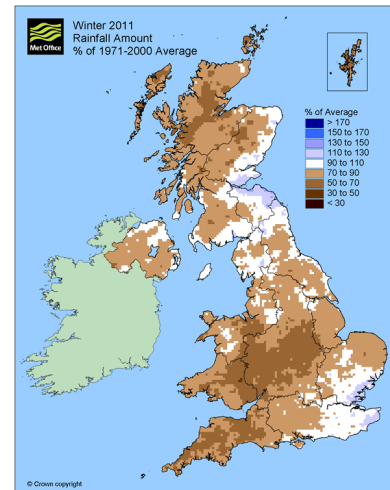
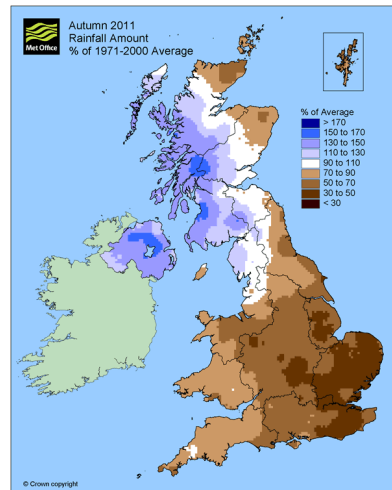


Production totale : 2,8 Mt

- Eastern = 20%
- East Midlands = 23%

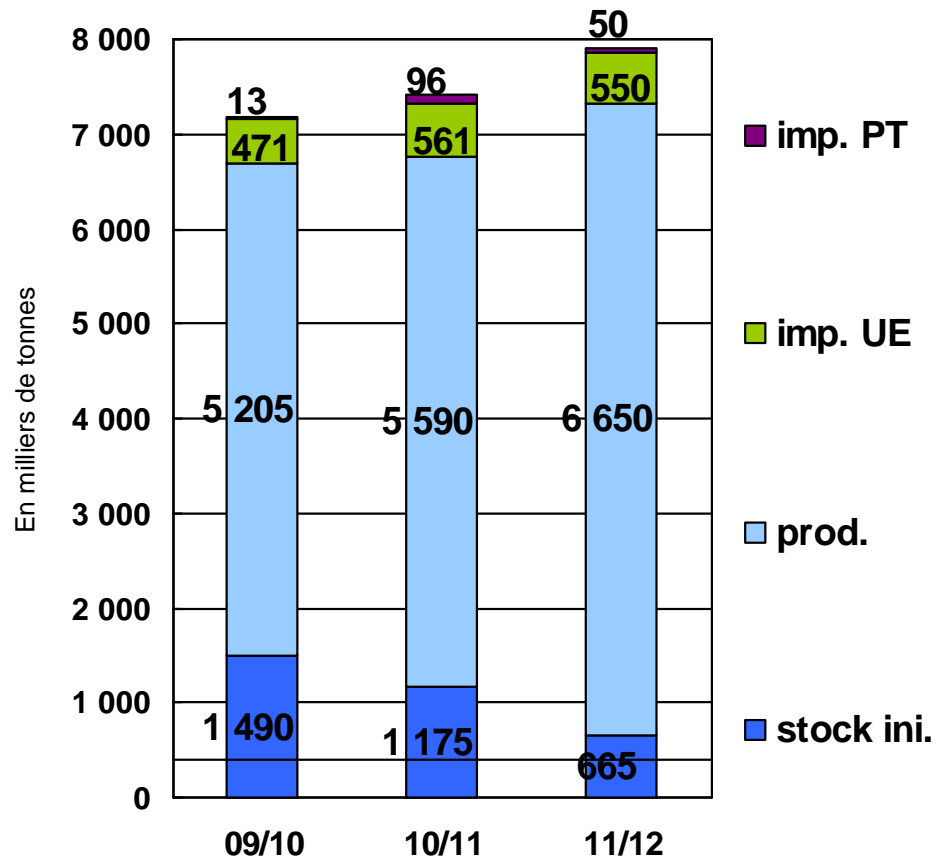


# Les précipitations sur le Royaume-Uni en dessous de la normale

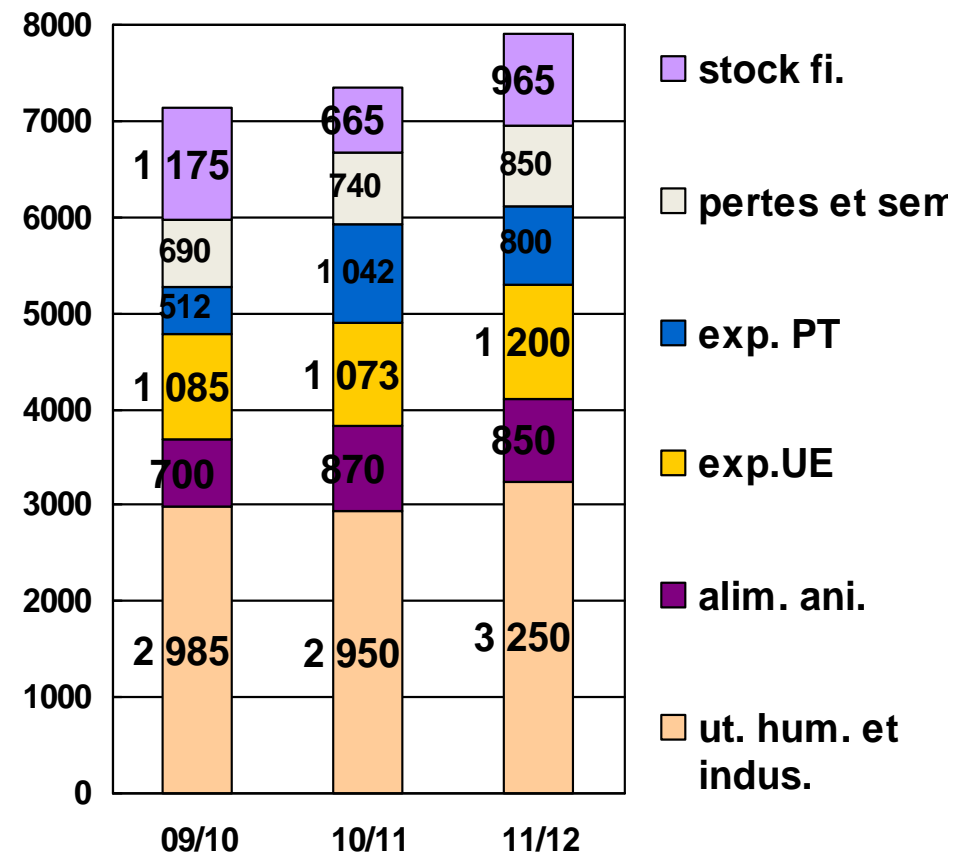


# Roumanie - bilan blé tendre

Total dispo 2011/12 : 7,9 Mt

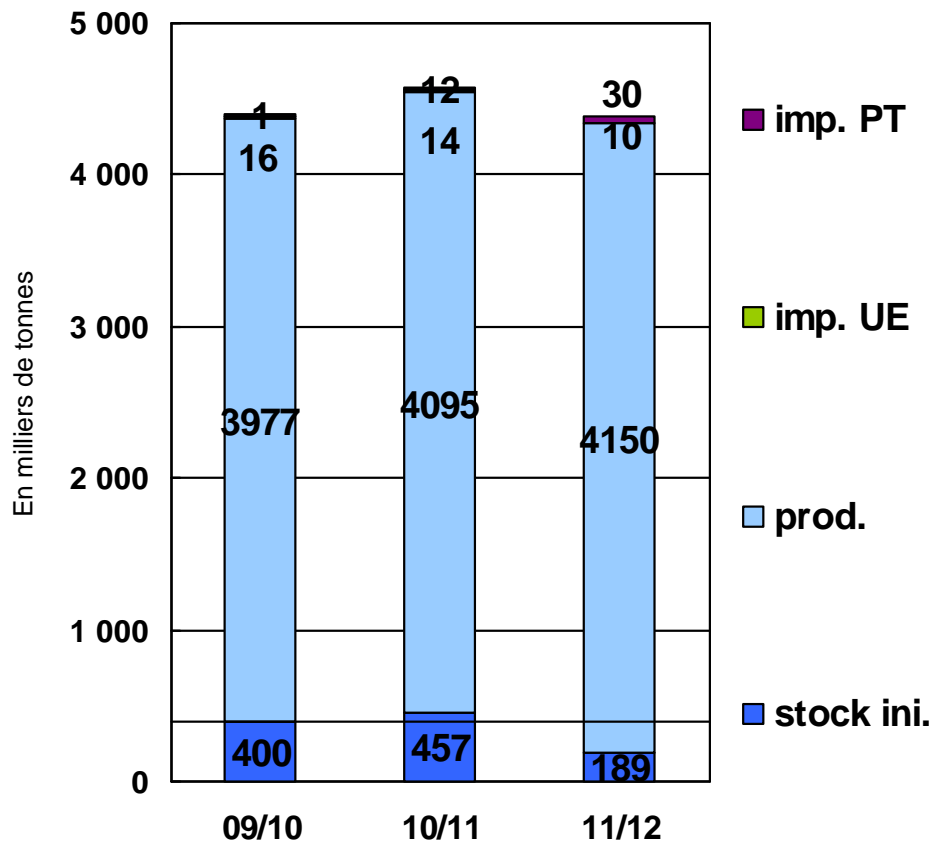


Total utilisation 2011/12 : 7,9 Mt

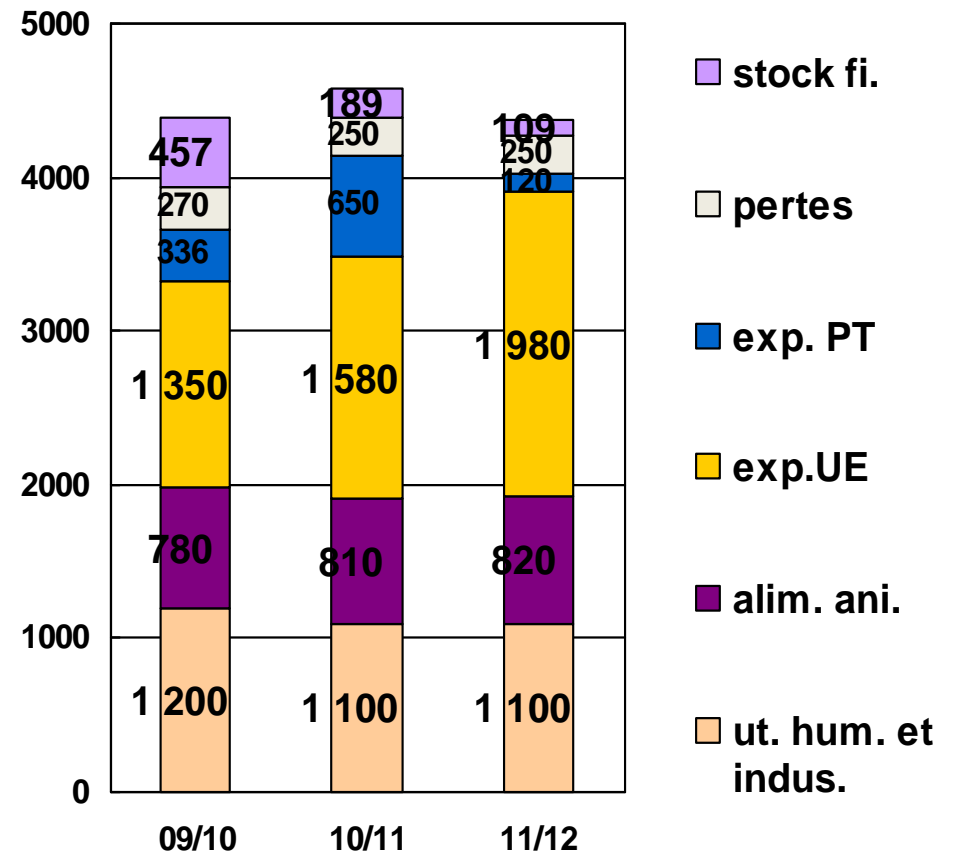


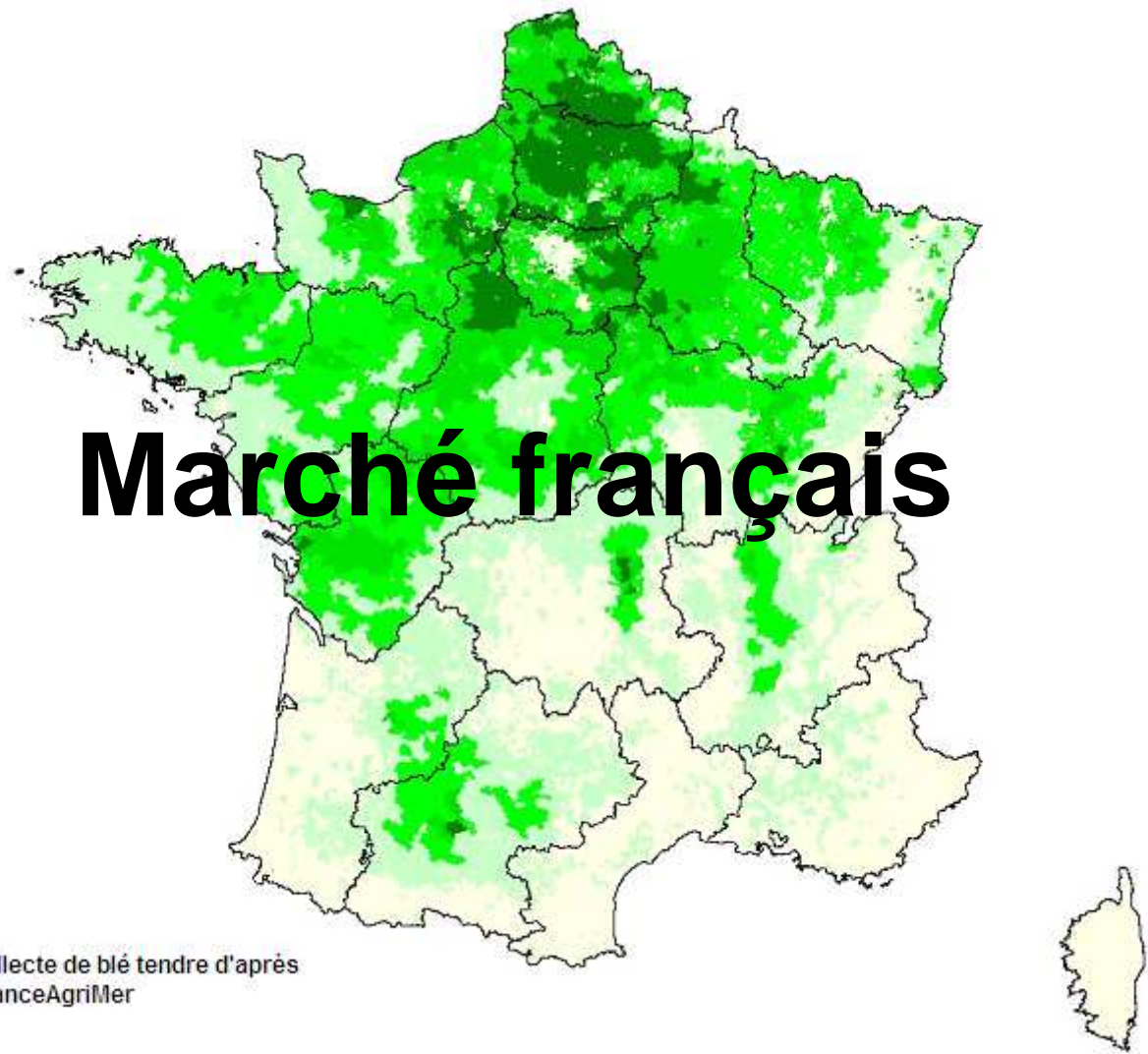
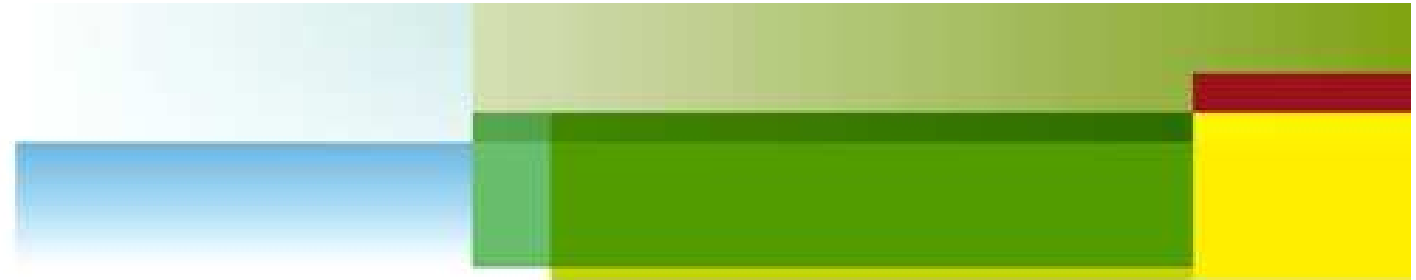
# Bulgarie - bilan blé tendre

Total dispo 2011/12 : 4,4 Mt



Total utilisation 2011/12 : 4,4 Mt

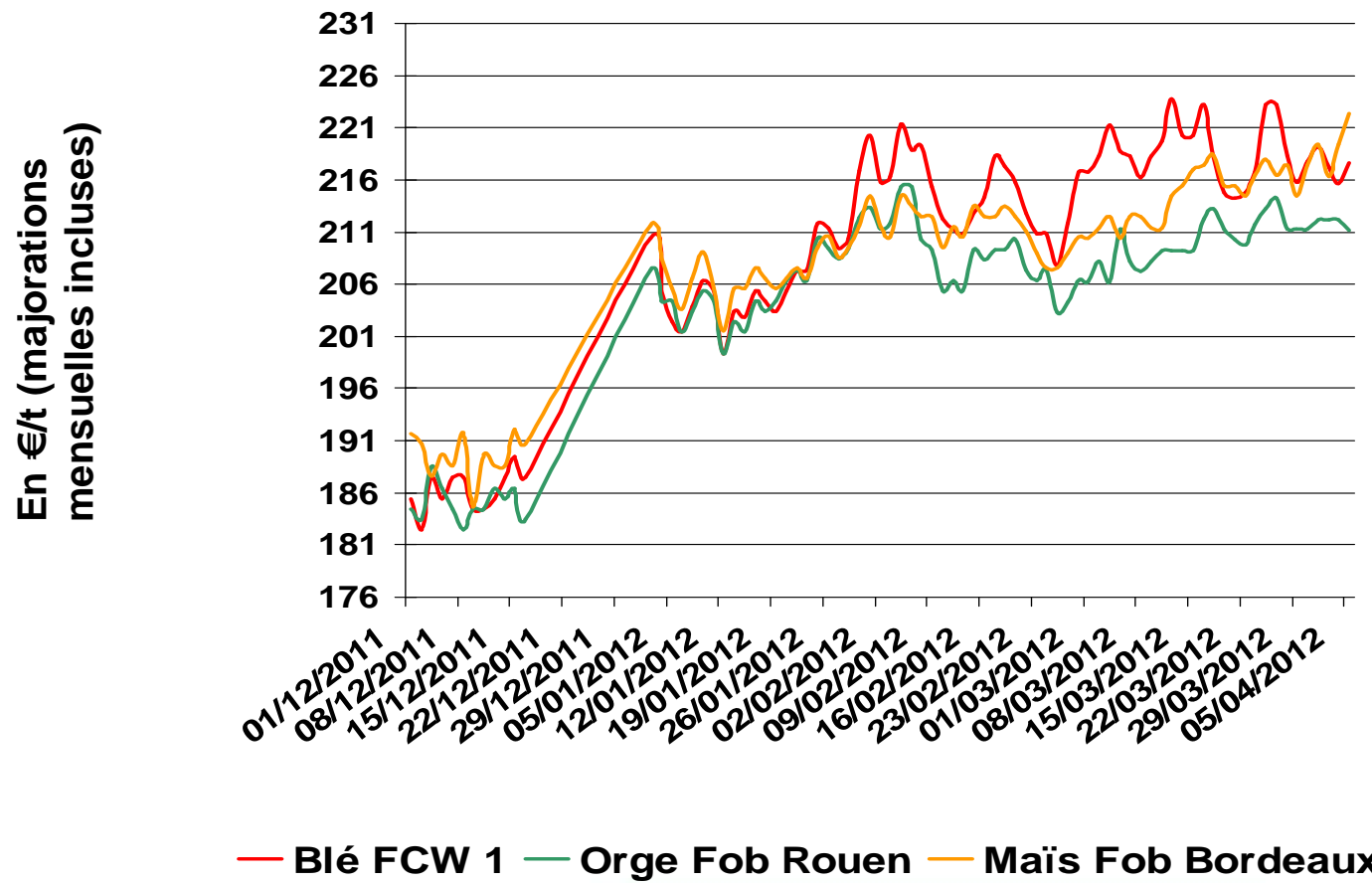




densité de collecte de blé tendre d'après les états 1 FranceAgriMer

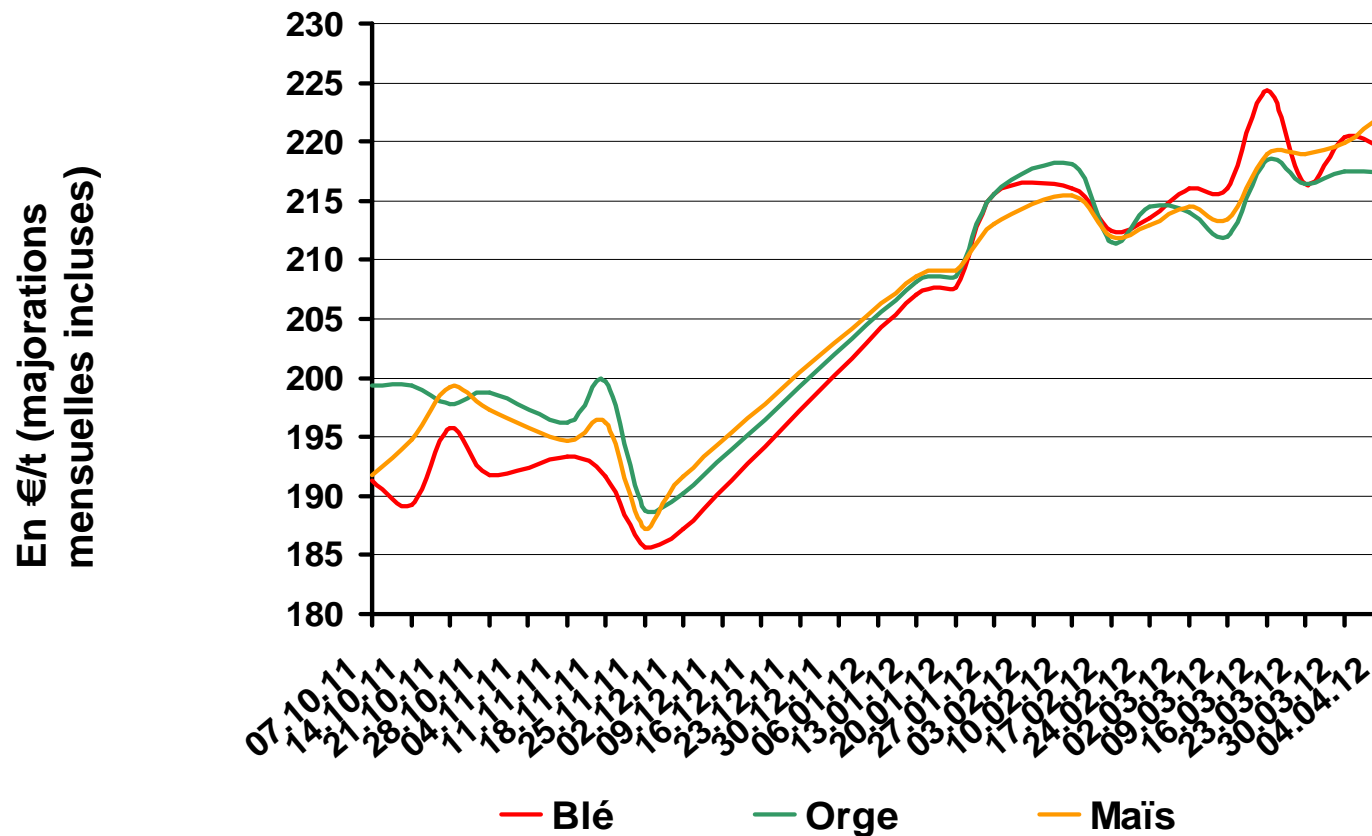


## Céréales françaises : cotations à l'exportation

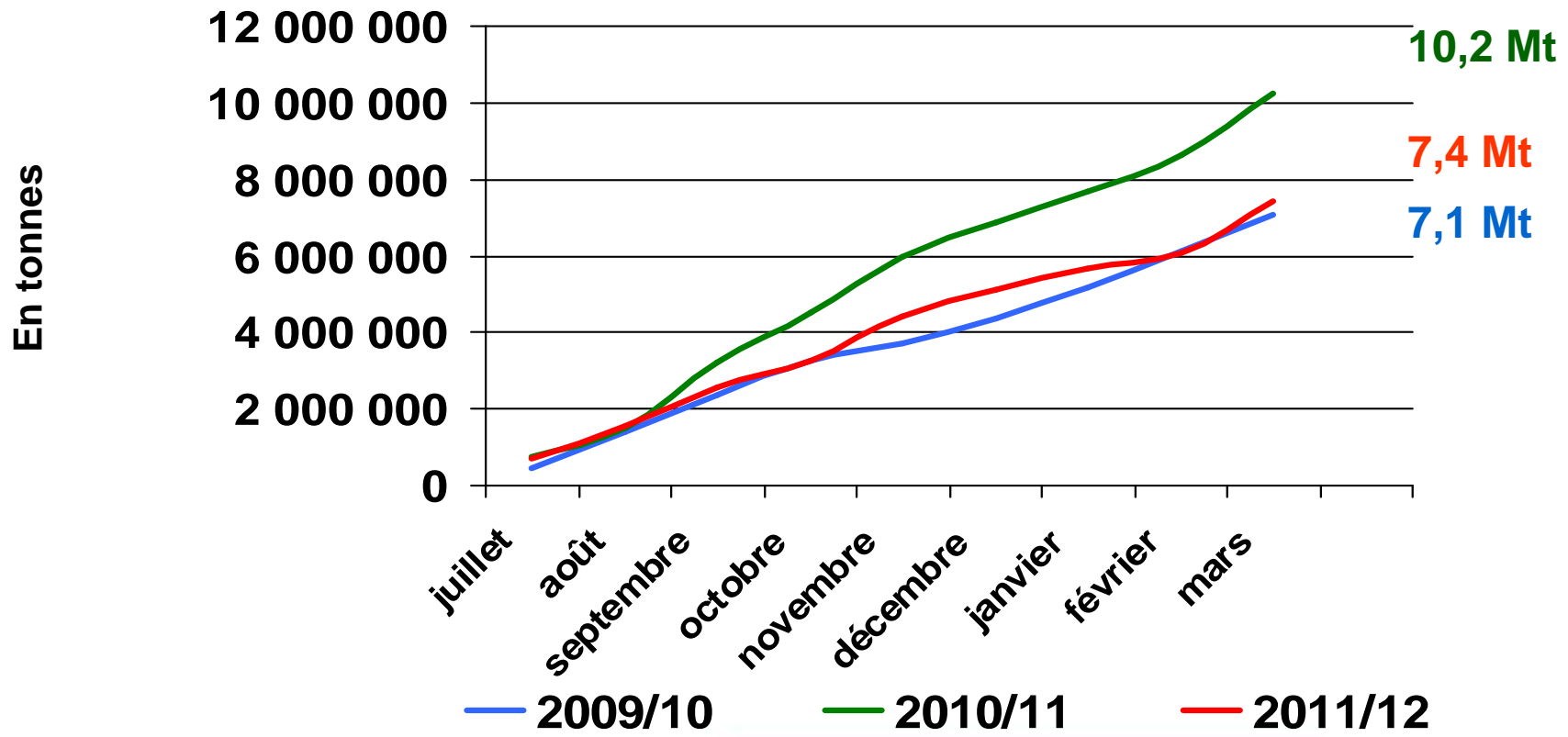


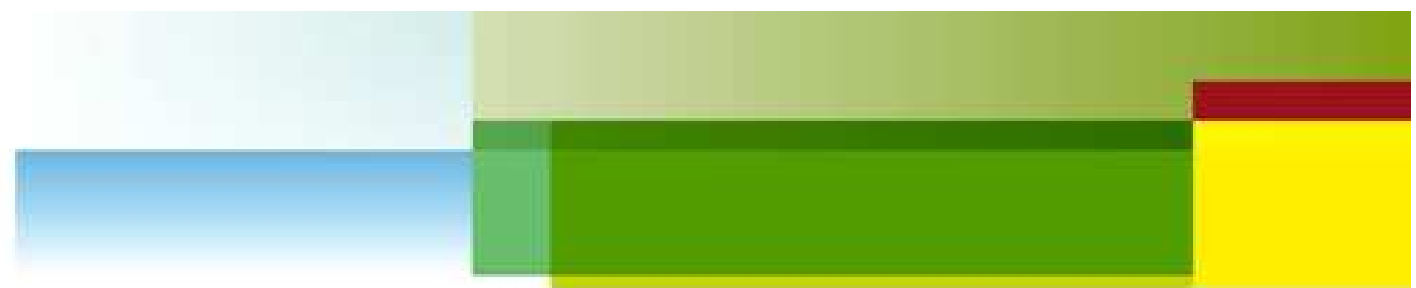


## Prix du blé tendre, de l'orge et du maïs en rendu Pontivy

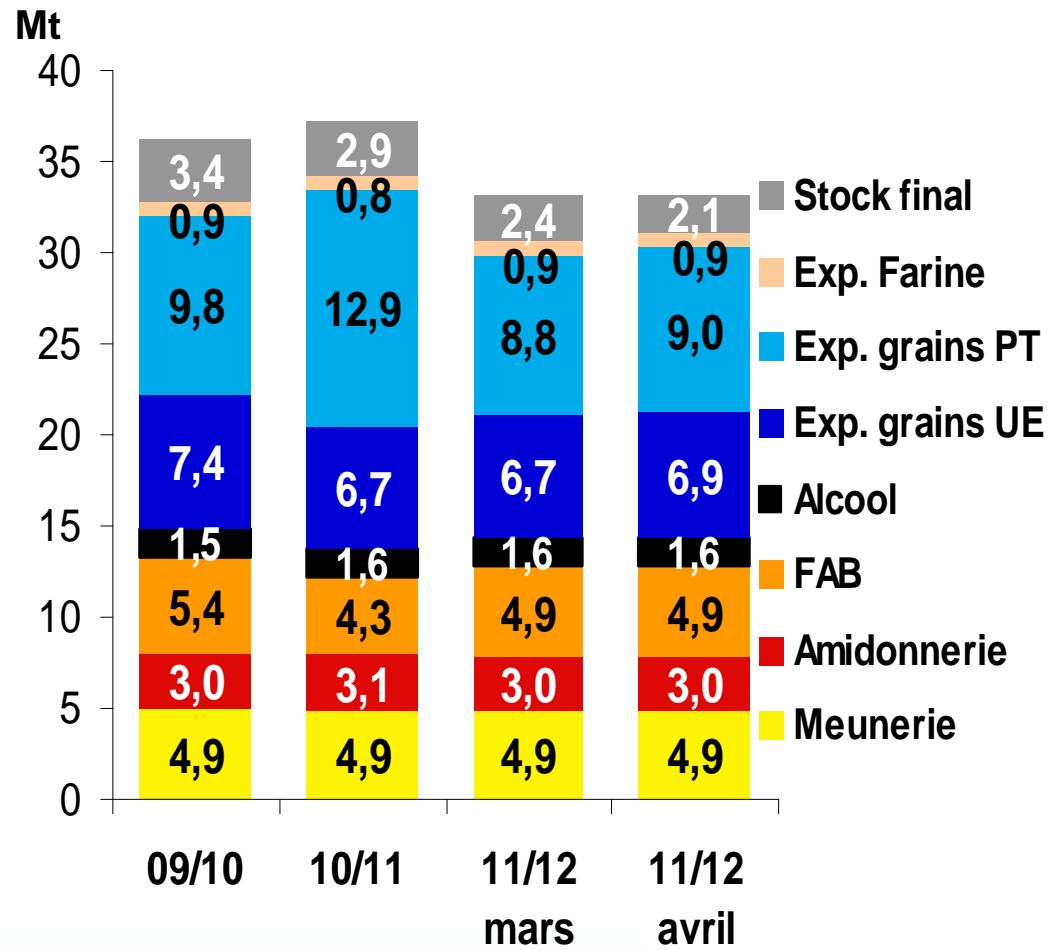
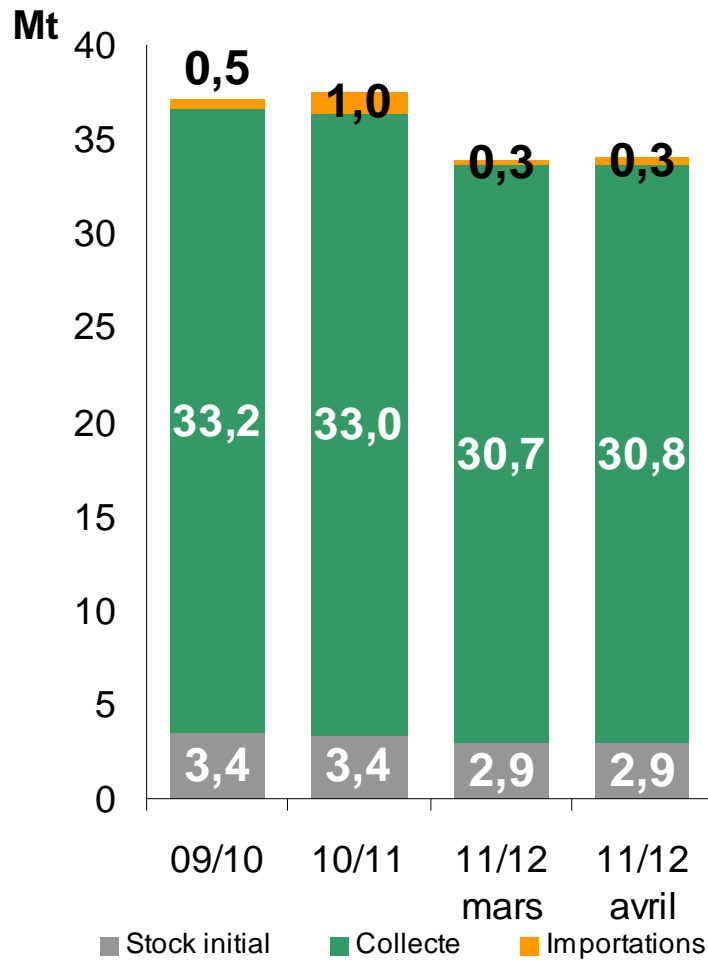


## Blé tendre : cumul des embarquements vers les pays tiers depuis les ports français

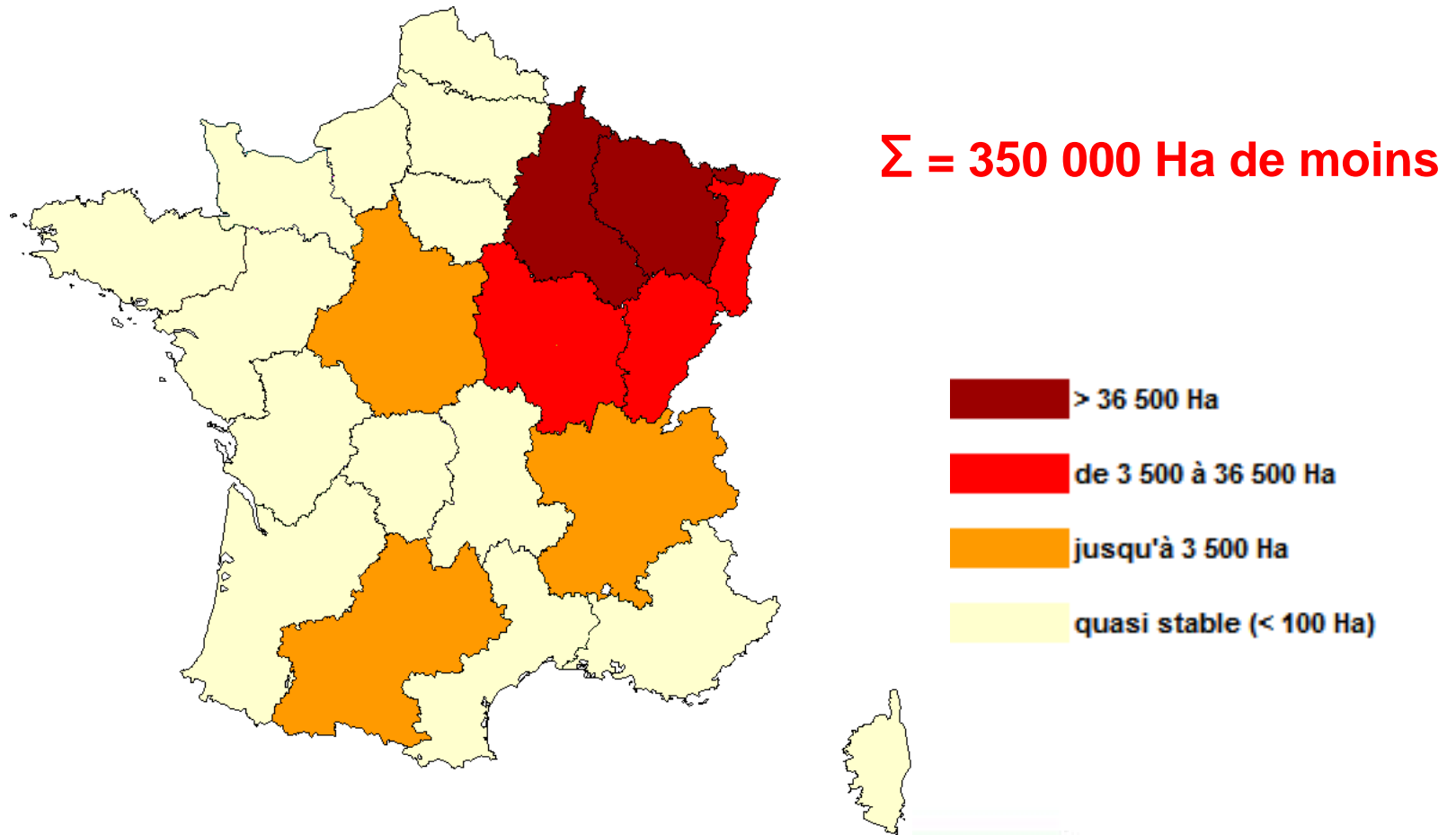


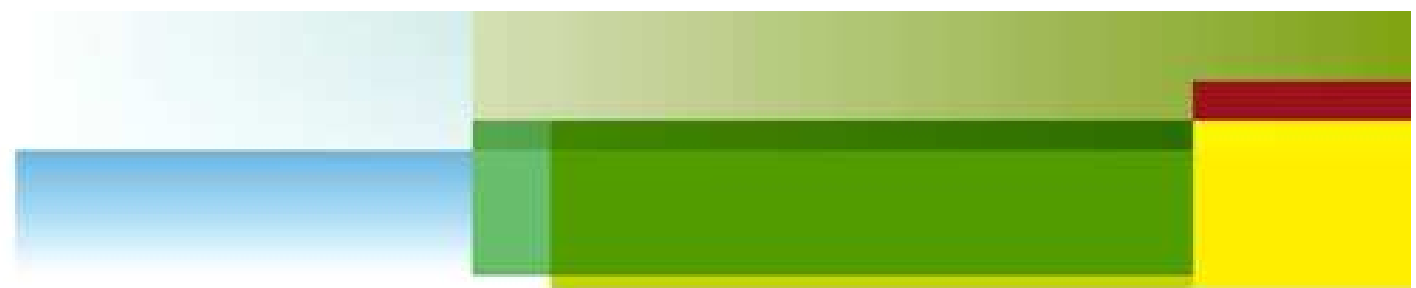


## Bilan blé tendre

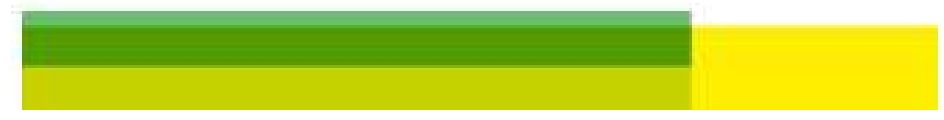
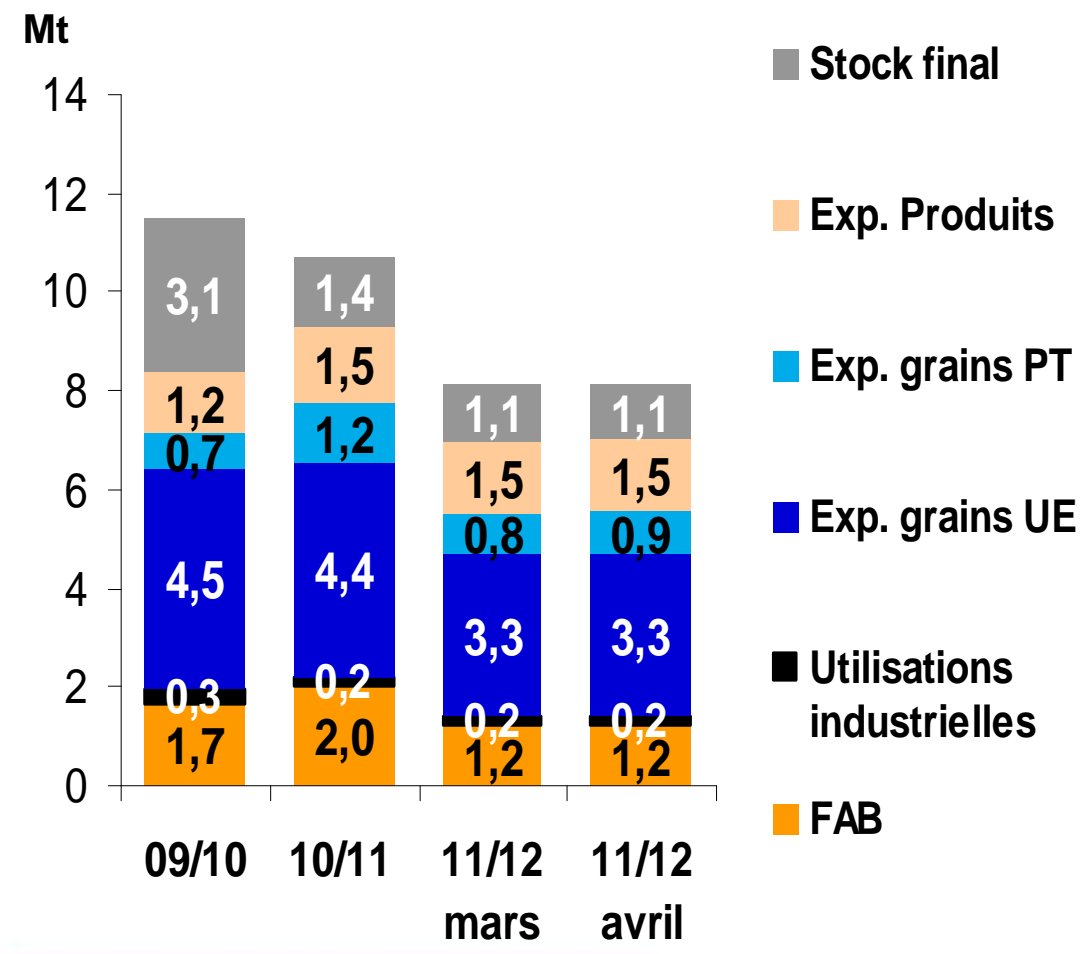
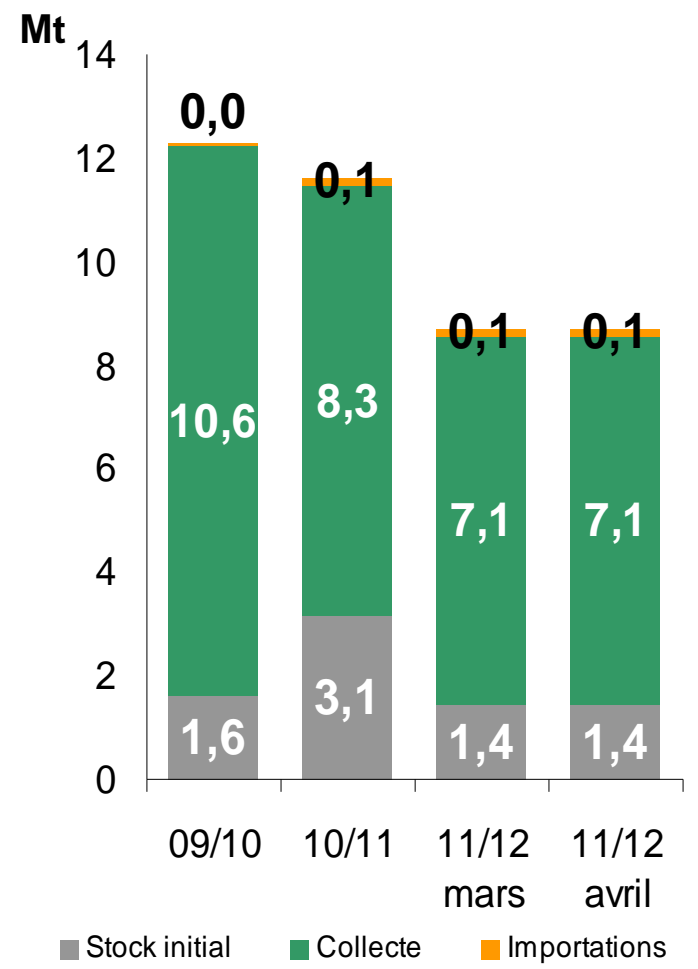


## Semis 2012 : diminution des estimations de surfaces de blé tendre

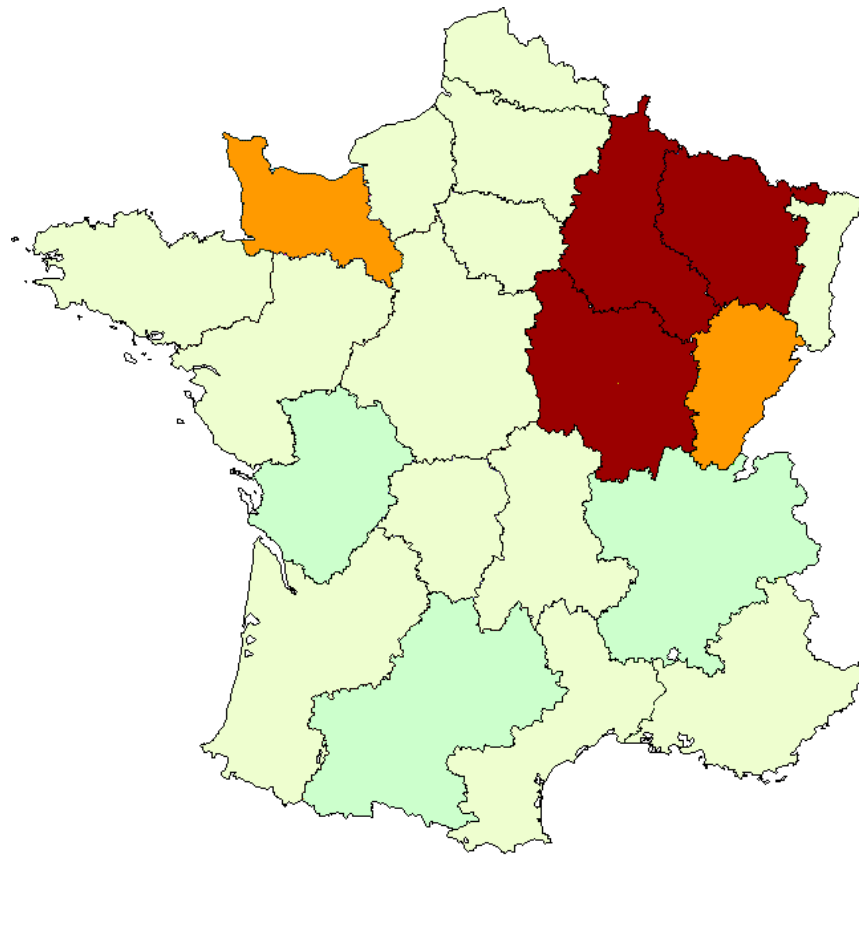






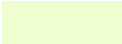
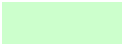
## Bilan orge

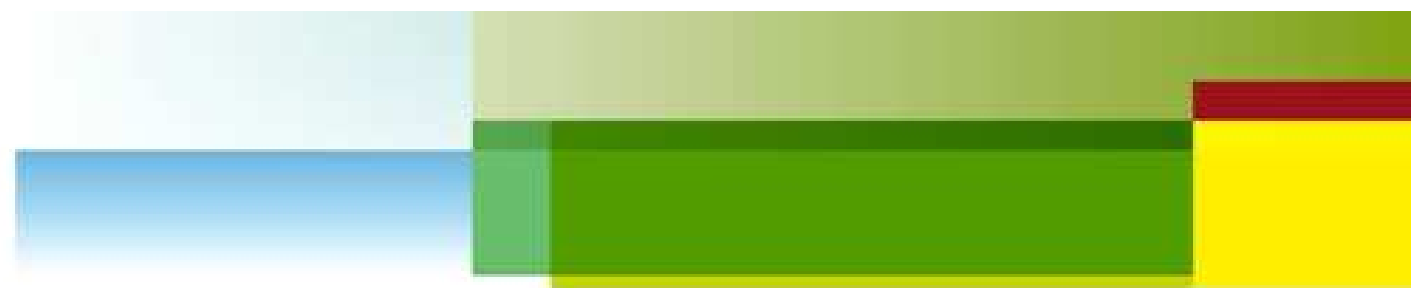


## Semis 2012 : évolution de l'estimation des surfaces en orges d'hiver

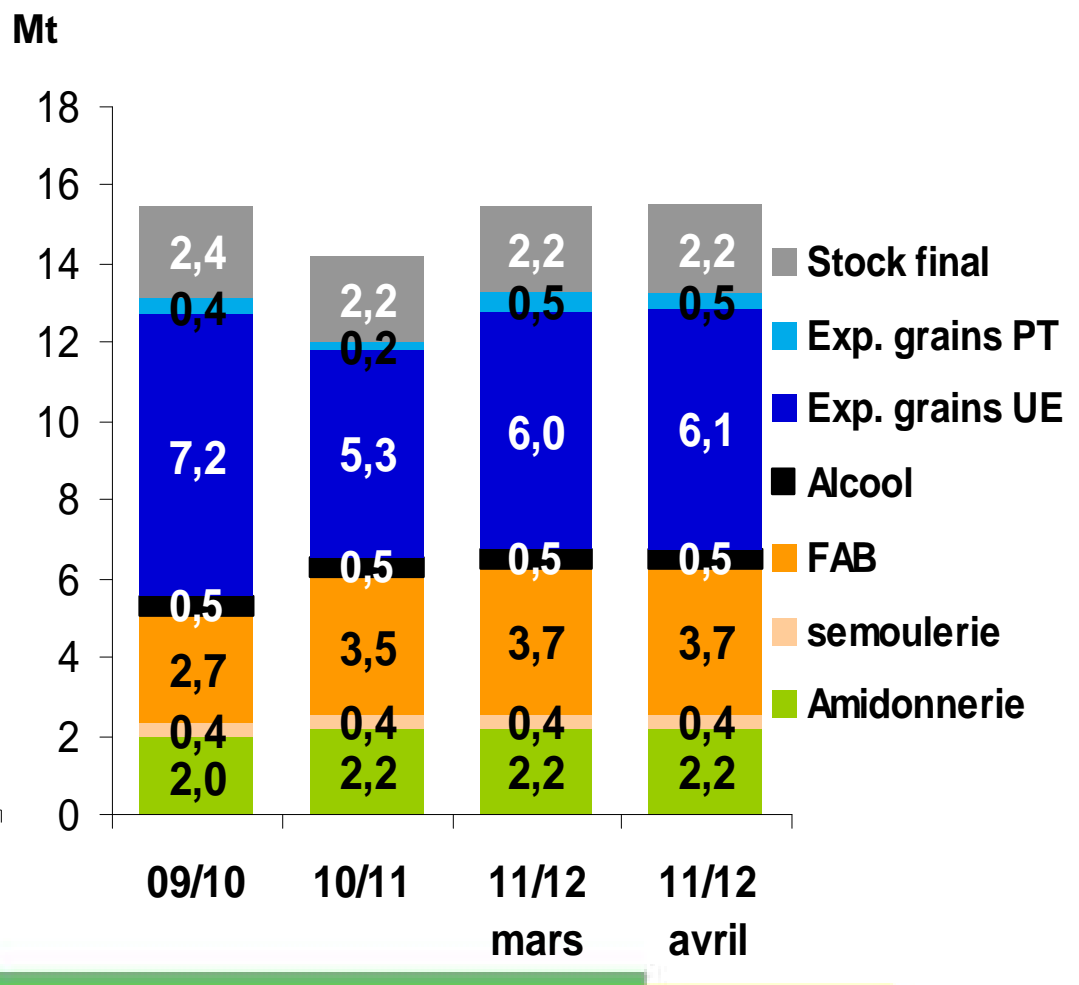
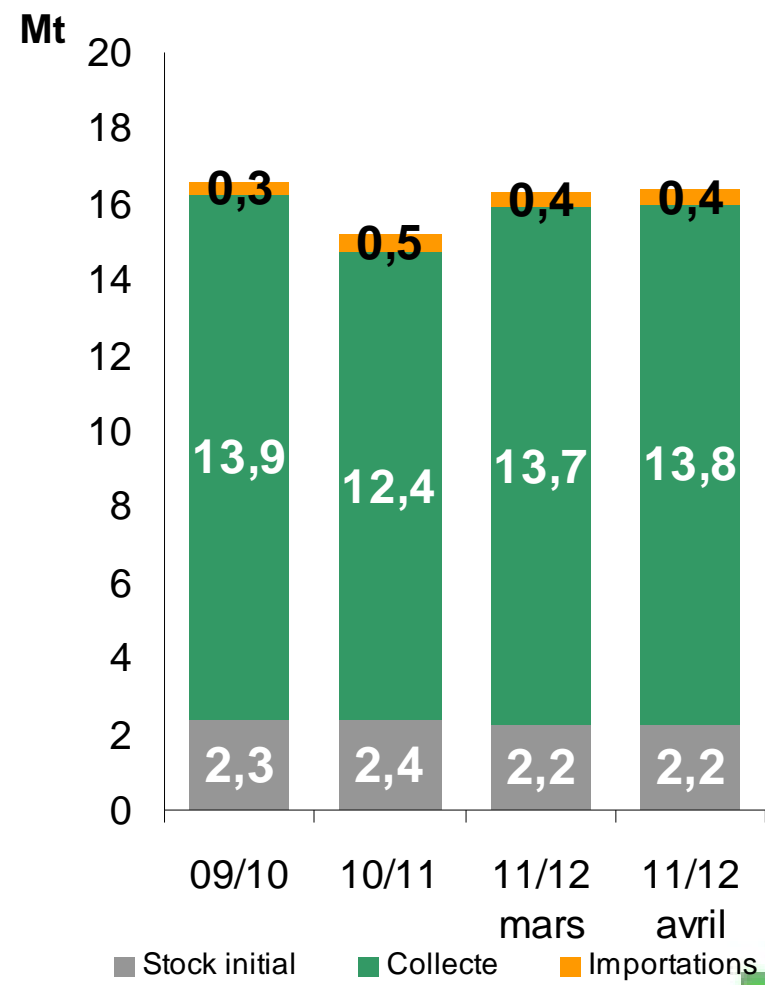


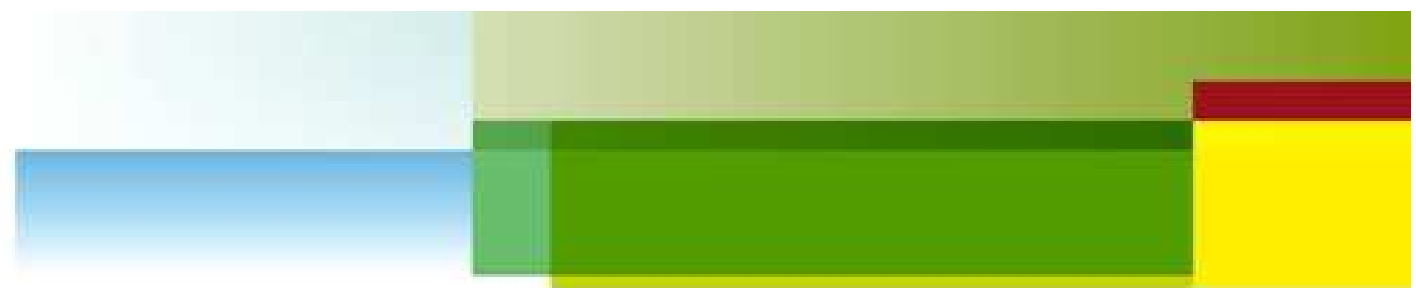
**$\Sigma = 155\ 000$  Ha de moins**

-  entre 3 000 et 63 000 Ha de perdus
-  évolution négative (jusqu'à - 3 000 Ha)
-  stable ou quasi stable
-  évolution positive (< 1 300 Ha)

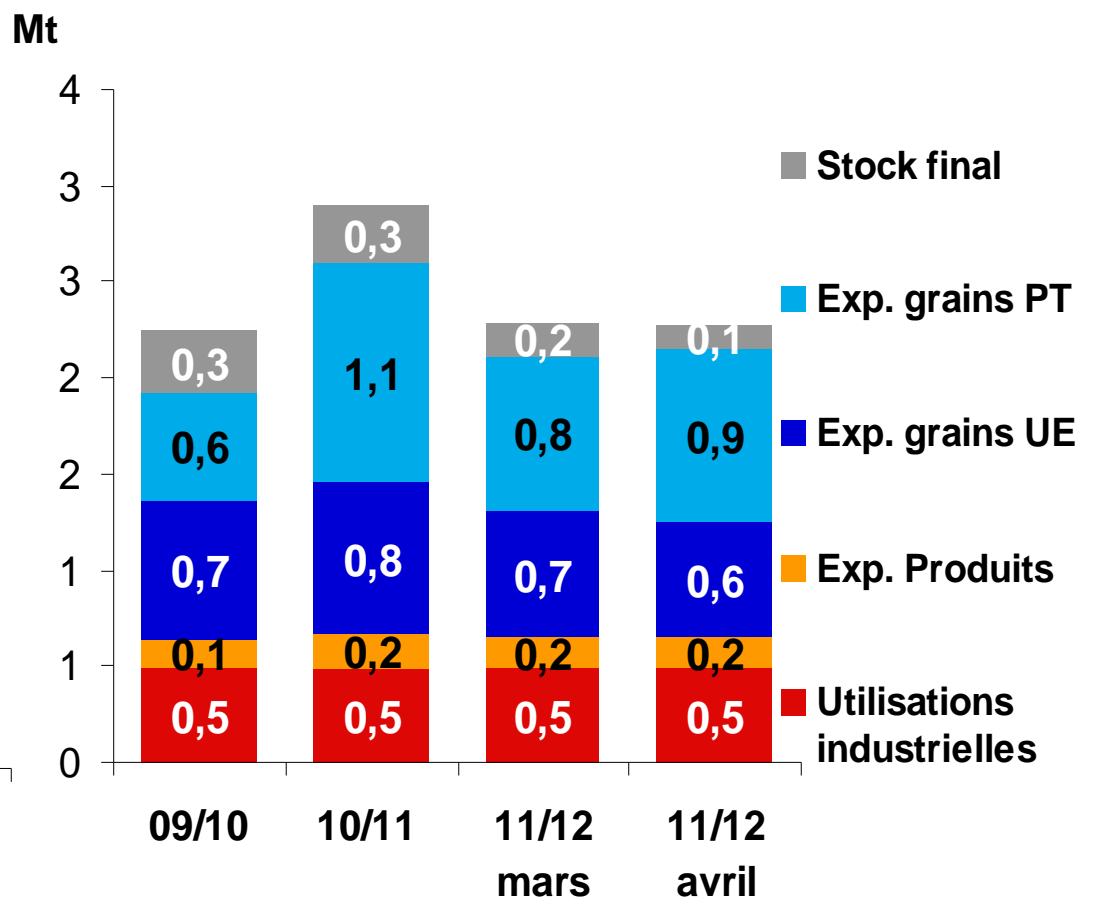
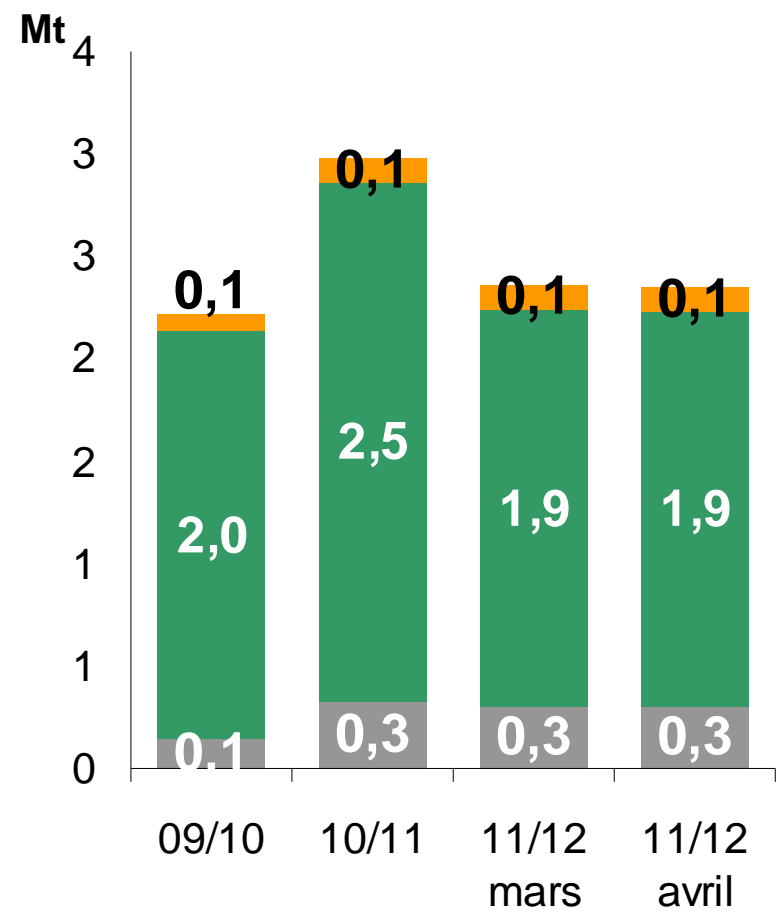


## Bilan maïs





## Bilan blé dur

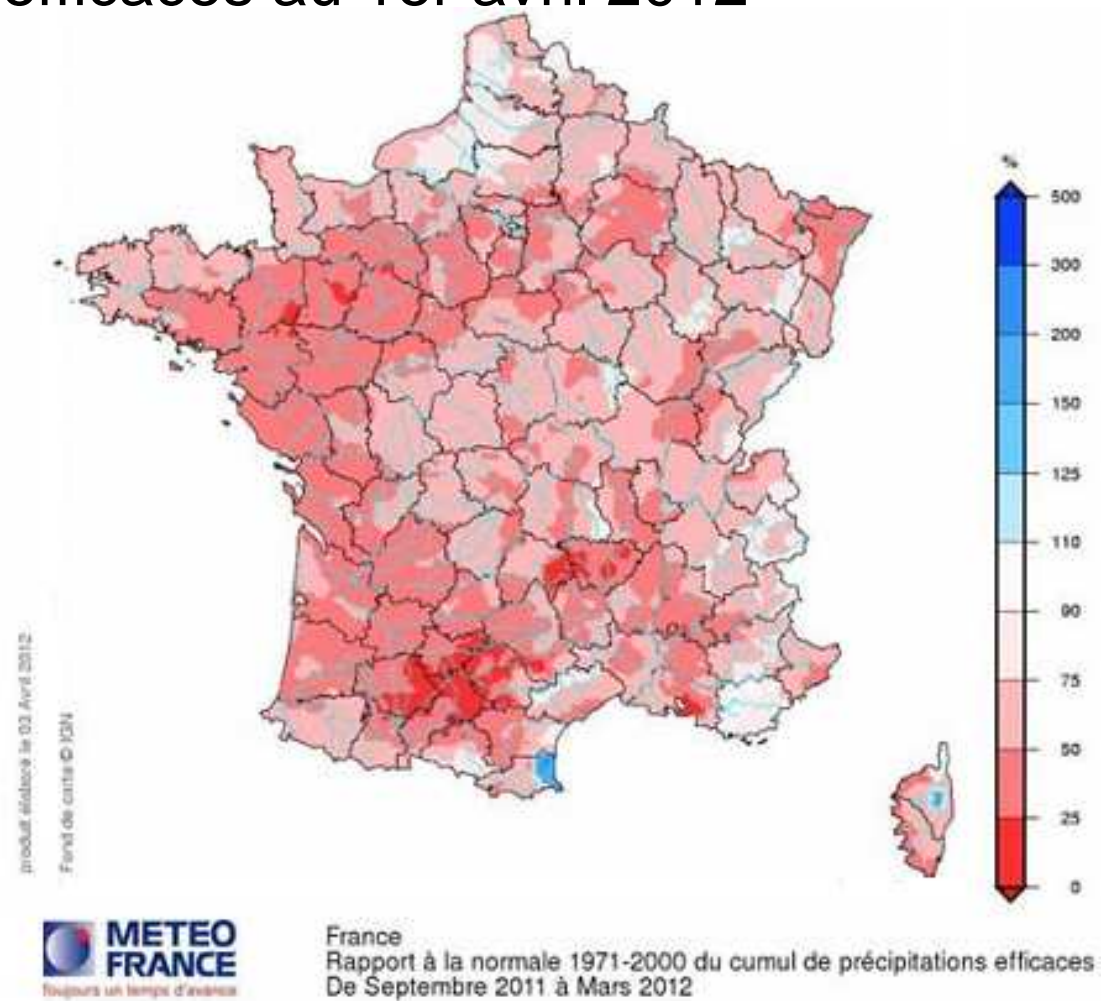


■ Stock initial   ■ Collecte   ■ Importations



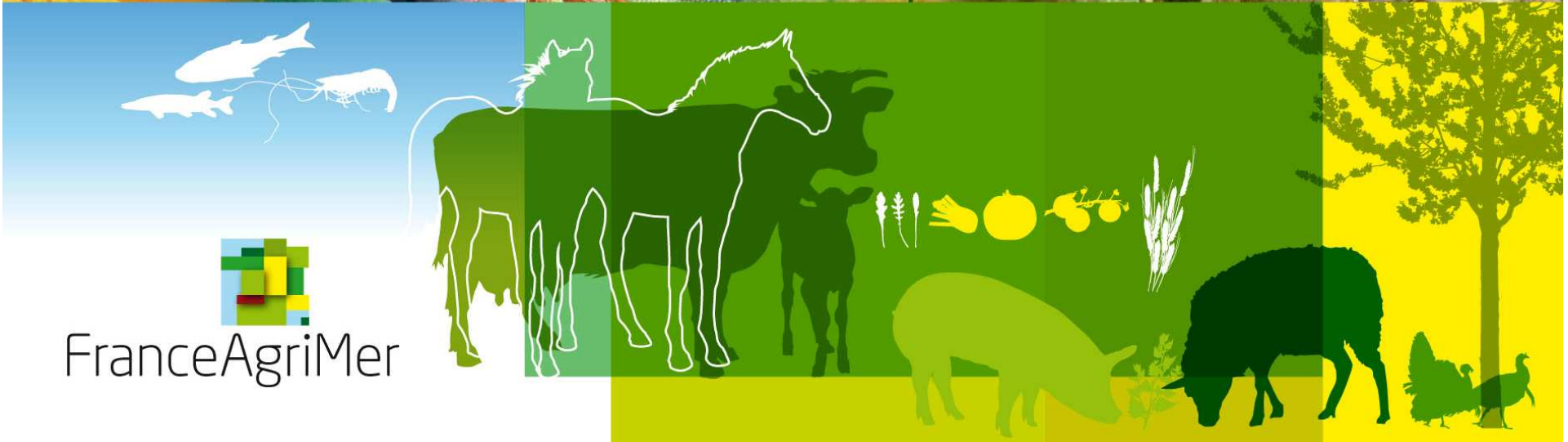


# Précipitations efficaces au 1er avril 2012



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