



## AHDB cereal exports *competitor report*

# France

## Harvest 2019

Wheat production is concentrated in the northern half of the country. The regions of Picardie, Centre, Champagne-Ardenne, Haute-Normandie and Nord-Pas-de-Calais account for a little over half of the French production, with 51% of the harvest. Champagne-Ardenne, located in the north-east, is France's leading producer of barley.

Yields were excellent for the French cereal harvest as a result of good growing conditions. The heatwave in July, therefore, only had a marginal impact on the harvest.

Wheat production totalled 39.4Mt for 2019/20, compared with 33.7Mt in 2018/19, according to the French Agricultural Institute, FranceAgriMer. Barley production totalled 13.7Mt in 2019/20, compared with 11Mt in 2018/19.

### Harvest 2019 – wheat quality (average)

- Test weight – 79.5 kg/hl
- Protein – 11.5%
- Hagberg Falling Number – 300 sec
- W (baking strength) – 186
- P/L value – 0.96
- Wet gluten – 22%
- Moisture – 12.1%

Source: FranceAgriMer, Cereal Quality Survey 2019

## Exports

North African markets such as Morocco and Algeria are expected to take a significant share of French wheat. However, whether it can be achieved will depend on the degree of competition from Black Sea wheats (given the increased availability of the latter in 2019/20, competition on this destination could intensify) and on the scale of Morocco's actual import need, which is forecast to increase on last year given that its harvest is set to be poor.

French wheat exports for 2019/20 are projected to total 19.8Mt and barley exports 7.3Mt.

## Main ports in France

Ports	Grain export volume (Mt)	Storage capacity (Mt)	Maxi tonnage per vessel (Tons)
Rouen	5-6	0.9	50,000
La Rochelle	2-3	0.44	100,000
Dunkerque	3-4	0.45	90,000
Bordeaux	1.1-1.3	0.455	40,000
Nantes	1.1	0.178	60,000

Source: France Export Cereales

## Classification of French wheat

The new classification system of French medium-hard wheat varieties was implemented on 1 July 2015. The new system looks to address the quality demands of domestic and international markets, emphasising protein and an easier-to-read set of criteria.

Categories	Protein	Baking strength (W)	Specific weight	Hagberg falling number (secs)	National breakdown 2019
Premium	11.5% min	170 min	77 kg/hl min	240 min	39%
Superior	11% min	Not specified	76 kg/hl min	220 min	43%
Medium	11.5% min	Not specified	Not specified	170 min	15%
Access	Specified in contract	Not specified	Not specified	-	3%

Source: France AgriMer, Cereal Quality Survey 2019

## French wheat and barley exports

### Wheat

Unit (Tonnes)	2017		2018
Algeria	3,349,221	Algeria	5,439,374
Belgium	2,314,397	Belgium	2,424,944
Netherlands	1,833,900	Netherlands	2,384,174
Spain	1,268,418	Spain	1,180,426
Italy	690,763	Italy	799,715
Morocco	653,326	Morocco	732,032
Portugal	470,330	Saudi Arabia	621,197

Cuba	389,751	Portugal	586,914
Germany	357,674	Germany	477,847
Cote d'Ivoire	323,126	Cuba	380,999
UK	276,329	Cote d'Ivoire	349,046
Egypt	247,501	Angola	293,789
Cameroon	164,825	UK	224,199
Mali	155,655	Switzerland	185,650
Senegal	144,339	Mauritius	141,347
Ireland	111,372	China	130,563

Source: Eurostat

## Barley

Unit (Tonnes)	2017		2018
Belgium	1,362,052	Belgium	1,376,376
Saudi Arabia	953,318	Saudi Arabia	1,052,266
Netherlands	853,916	Netherlands	969,531
Tunisia	383,995	China	576,352
Spain	344,418	Germany	396,289
Germany	267,484	Tunisia	369,044
Algeria	264,365	Spain	203,615
Jordan	222,530	Italy	179,094
Morocco	221,266	Algeria	174,372
China	220,770	Jordan	168,000
Italy	195,589	Morocco	164,215
Israel	83,199	Portugal	82,052
Portugal	75,567	Libya	76,369
Libya	60,675	Iran	64,557
Luxembourg	26,898	Ireland	64,492

Source: Eurostat

## Supply and demand

As at Dec 2019 1000 Mt	2018/19 Wheat	2018/19 Barley	2019/20 Wheat (Forecast)	2019/20 Barley (Forecast)
Beginning stocks	2,963	1,564	2,610	1,324
Production	33,798	11,064	39,487	13,738
Imports	277	163	276	93
Total supply	37,039	12,790	42,373	15,155
Exports	17,046	6,182	19,850	7,327

<b>Feed domestic consumption</b>	6,974	3,285	8,479	3,859
<b>FSI consumption</b>	9,305	1,718	9,777	1,740
<b>Domestic consumption</b>	17,383	5,284	19,358	5,920
<b>Ending stocks</b>	2,610	1,324	3,164	1,909

Source: Strategie Grains

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