



## *AHDB cereal exports **target market report***

# Portugal

### *Harvest 2019*

Portugal's low domestic production is due to its terrain, which is not suited to wheat and barley production. For the 2019/20 season, wheat and barley production are forecast at around 50,000 tonnes each. By contrast, it has a fairly large maize production, which totals approximately 780,000 tonnes each year.

### *Import requirements*

Around 90% of Portugal's wheat supply is imported. The majority of Portugal's 1.2Mt of wheat is sourced from France, followed by Bulgaria and smaller quantities from UK, Germany and Spain.

Portugal has a small number of flour mills, mainly located around Lisbon and Porto. Several have experimental bakeries, which complement laboratory results and allow millers to provide a consistent supply to the bakeries.

**The top three** cereal importing groups are based in Porto and between them share approximately **80%** of the market:

- Cerealis Internacional
- Moagem Ceres
- Acembex

Other smaller mills that are based in the Lisbon area share approximately 15–20% of the market.

#### **Actual common bread wheat specifications demanded by millers**

Spec weight – 77/hl kg min / Hagberg – min 250 secs / W – 200–250 / Protein – 11% min / P/L 0.8 max

#### **Actual biscuit wheat specifications demanded by millers**

Spec weight – 76 kg/hl min / Hagberg – min 225 secs / W – 100 min / Protein – 10.5–11.5% / P/L 0.3 max  
L 110 min

## Animal feed market

There is a significant feed milling industry in Portugal. Feed mills are located all over the country. Cereal consumption by Portuguese feed millers is at 2.8Mt.

### Industrial feed production

As at Dec 2019 (Mt)	2018/19	2019/20 (Forecast)
Pigs	0.7	0.7
Poultry	1.5	1.5
Cattle	0.8	0.8
Total	3.0	3.0

Source: Strategie Grains

### Consumption of wheat, barley and maize in industrial and on-farm animal feeds

As at Dec 2019 (Mt)	2018/19	2019/20 (Forecast)
Maize	2.4	2.3
Barley	0.1	0.2
Wheat	0.2	0.3
Total	2.7	2.8

Source: Strategie Grains

## Consumer trends

### **Bread**

- Bread remains an important diet staple; baguettes, bagels and ciabatta replacing traditional Portuguese rolls
- Traditional hot meals at lunchtime being replaced by sandwiches
- Supermarkets selling breads – now more popular than artisan bakeries
- High consumption of baguettes and ciabattas in main cities such as Porto and Lisbon

### **Biscuits**

- Slight increase in biscuits and breakfast cereal consumption
- Women and children are the main consumers

## Competitors in the market

### Wheat

As at July 2019 1000 Mt	2018/19		2019/20 (Forecast)
France	629	France	620
Bulgaria	198	Bulgaria	140
Romania	52	UK	140
Germany	40	Germany	65
Spain	36	Lithuania	60
UK	9	Sweden	60
Lithuania	8	Romania	30
Estonia	7	Poland	30
Poland	6	Spain	20
		Latvia	20

Source: Strategie Grains

### Barley

As at July 2019 1000 Mt	2018/19		2019/20 (Forecast)
Spain	88	UK	157
France	46	France	82
UK	44	Spain	50
Denmark	4	Denmark	6
Germany	2	Sweden	3
Sweden	2	Germany	1

Source: Strategie Grains

## 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	76	2	75	5
Production	57	50	50	47
Imports	1,082	180	1,199	313
Total supply	1,214	232	1,323	366
Exports	5	11	16	31
Feed domestic consumption	166	117	257	221
FSI consumption	954	91	949	105
Domestic consumption	1,135	216	1,222	335
Ending stocks	75	5	86	0

Source: Strategie Grains

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