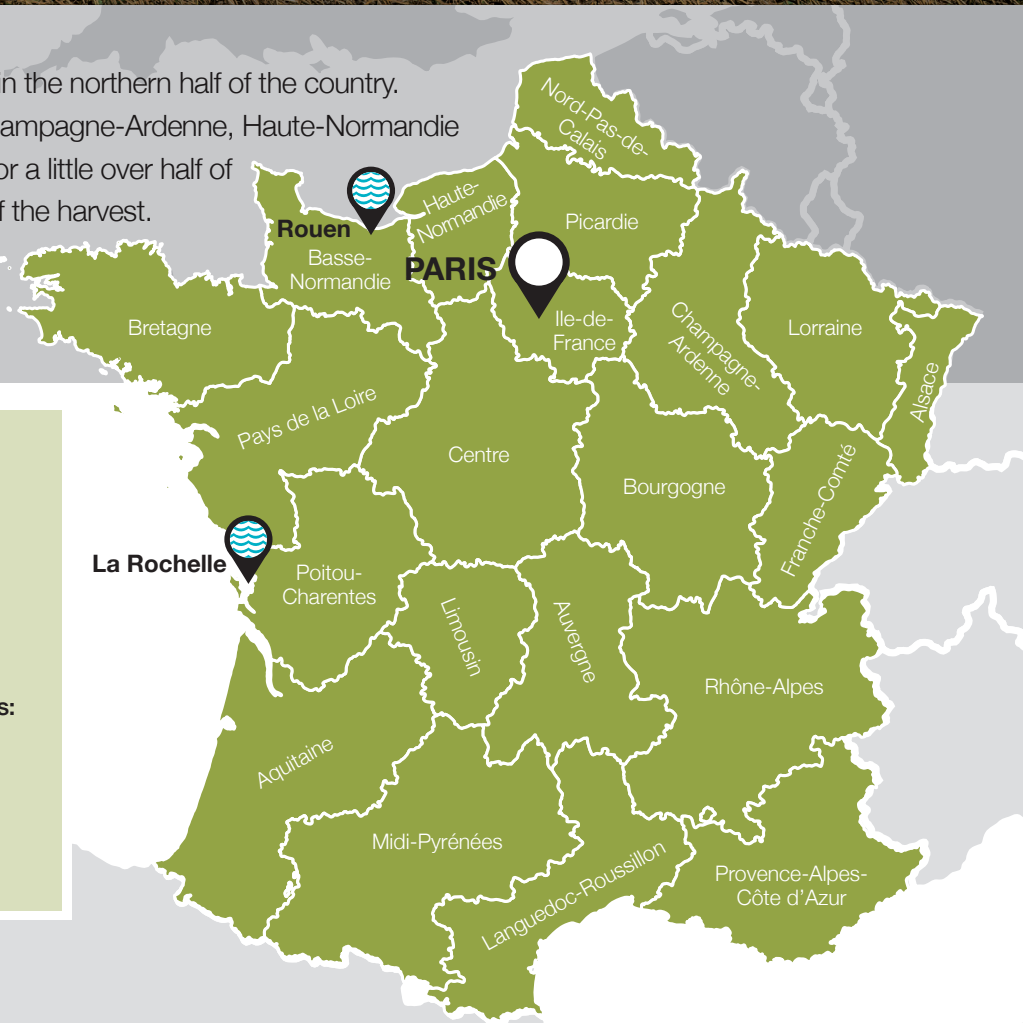


# Competitor Report FRANCE

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. The Champagne-Ardenne, located in the north east, is France's leading producer of barley.



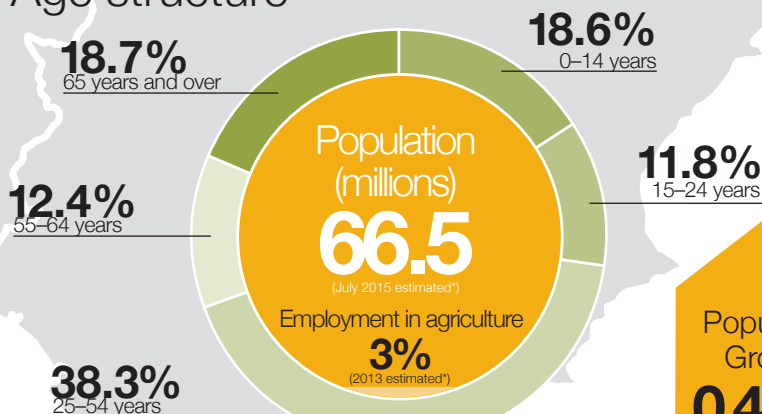
**33.4%**  
arable area  
Area of country  
(sq km) – 643,801

**French biscuit wheat production areas:**

- Champagne-Ardenne
- Bourgogne
- Picardie
- Ile-de-France
- Pays de la Loire
- Poitou-Charentes

## Demographic

### Age structure



(2015 estimated)

### Main ports in France

#### Rouen

- Largest port for cereal exports
- 900,000 tonnes dedicated to grain export\*

#### La Rochelle

- Second largest port for cereal exports
- Handles Panamax type ships
- High loading rates of up to 1,500 tonnes/hour\*\*



\*Source: haropa-solutions.com  
\*\*Source: larochelle.port.fr

**Economics**

GDP (growth)

**1.1%**

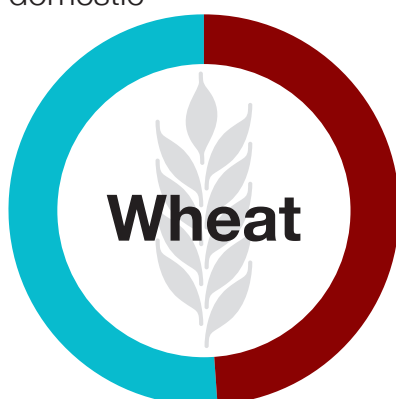
(2015 estimated\*)

GDP (in agri)

(2014 estimated\*)

**1.7%**GDP (per capita)  
**\$41,200**

(2015 estimated)

**Harvest 2015****50%**  
domestic**50%**  
export**41%**  
domestic**59%**  
export**Assurance schemes in France**

A **farm health and safety awareness campaign** and scheme was launched in 2010 for the prevention of risk to farmers using potentially dangerous crop protection products. It was undertaken by the French agrochemical industry association, the UIPP.

Source: agra-net.net

**French cooperatives** adhere to the **Arvalis Charter farm assurance scheme**

to ensure good practice and compliance relating to environment, production methods and food safety. There are different modules covering soil health, management, agri-technology and product quality. **No post-farmgate schemes exist.**



French soft wheat quality is highly atypical, with very low yields resulting from catastrophic grain formation and grain fill phases as a result of rains during the harvest period. Although breadmaking strength is generally good in terms of value (92% of production has a W value over 170), actual suitability for baking is extremely variable across the harvest because in many cases protein chains are short.



Production of winter malting barley is down by 60% and production of spring malting barley down by 35%

Protein content is high on account of the low barley yields. Grain size is also negatively impacted, with only around 60% of winter barley >2.25mm (compared with a 3-year average of 89.8%) and 76% of spring barley >2.25mm (compared with a 3-year average of 91%).

**Yields for wheat:**

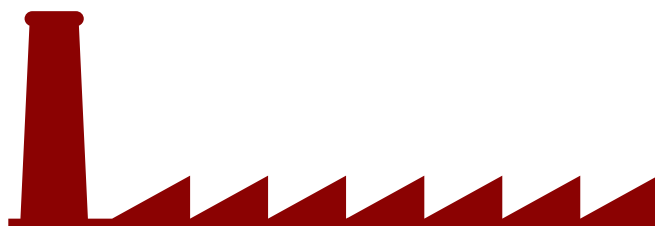
2016/17 (forecast)	5.46t/ha
2015/16	7.88t/ha
2014/15	7.48t/ha

Source: Strategie Grains

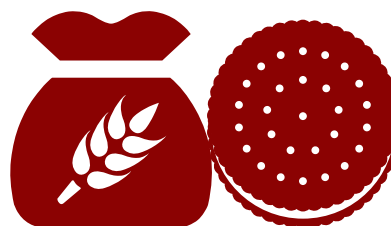
**Yields for barley:**

2016/17 (forecast)	5.49t/ha
2015/16	7.08t/ha
2014/15	6.64t/ha

Source: Strategie Grains

**Harvest 2016****Wheat quality specifications for 2016**

Protein content >12.5%	62%
Specific weight <76kg/hl	75%
Hagberg falling number >220 secs	88%

**Average soft wheat specifications for 2016**

Specific weight	73.2kg/hl
Average protein content	12.7%

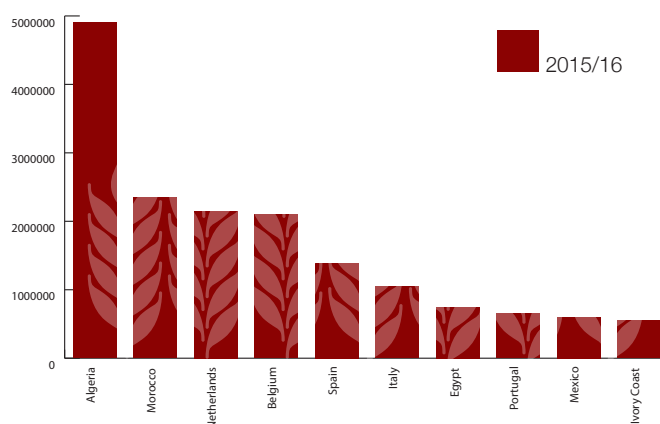
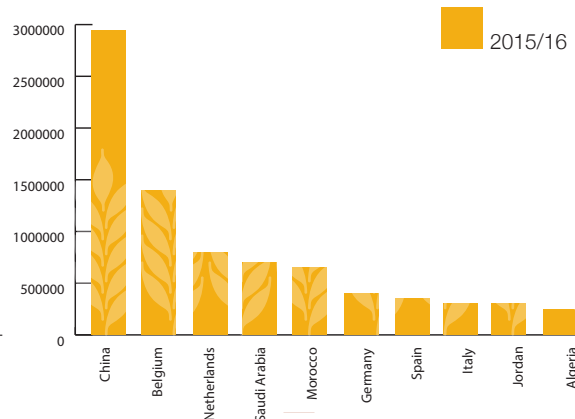
Source: France Agrimer/Arvalis-Institut du Végétal

**New classifications of French wheat**

A 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 (secs)	National breakdown for 2016
<b>Premium</b>	11.5% min	170 min	77kg/hl min	240 min	10%
<b>Superior</b>	11% min	Not specified	76kg/hl min	220 min*	39%
<b>Medium</b>	10.5% min	Not specified	Not specified	170 min*	35%
<b>Access</b>	Specified in contract	Not specified	Not specified	Not specified	17%

\*The Superior and Medium categories can be used without a Hagberg specification  
Source: France Agrimer/Inland silos quality survey 2015

**Exports****Wheat destinations (soft)**  
Volume (t)**Barley destinations**  
Volume (t)

Source: French customs via France Agrimer presentation

## Production and exports

### Wheat and barley production and exports over the past three years (tonnes)

	2013/14		2014/15		2015/16	
	Production	Exports	Production	Exports	Production	Exports
<b>Wheat</b>	36,748,000	19,025,000	37,451,000	19,309,000	40,710,000	20,427,000
<b>Barley</b>	10,361,000	5,470,000	11,716,000	6,625,000	12,919,000	7,671,000

Source: Strategie Grains

### Wheat and barley supply and demand (tonnes)

	Wheat 2015/16	Wheat 2016/17 Forecast	Barley 2015/16	Barley 2016/17 Forecast
<b>Opening stocks</b>	3,171,000	4,212,000	1,382,000	1,460,000
<b>Production</b>	40,710,000	28,485,000	12,919,000	10,106,000
<b>Imports</b>	792,000	1,128,000	127,000	109,000
<b>Total supply</b>	44,673,000	33,825,000	14,428,000	11,675,000
<b>Total demand</b>	20,034,000	19,936,000	5,297,000	5,705,000
<b>Animal feed</b>	9,145,000	8,839,000	3,287,000	3,724,000
<b>EU exports</b>	7,804,000	6,172,000	3,027,000	2,962,000
<b>Non-EU exports</b>	12,623,000	4,479,000	4,644,000	1,682,000
<b>Closing stocks</b>	4,212,000	3,238,000	1,460,000	1,327,000

Source: Strategie Grains