



AHDB cereal exports *competitor report*

France

Harvest

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 French production, with 51% of the harvest. The Champagne-Ardenne region, located in the north-east, is France's leading producer of barley.

The harvest rains have drastically affected grain quality, with test weight taking a hit. As a result, the average yield expectations have dropped from 7.6 t/ha to 7.07 t/ha. For test weights, a key measure of wheat quality, only 20% of the crop was estimated to exceed the 76 kg per hectolitre (kg/hl) minimum commonly applied for milling in France, according to data published by the French agricultural institute, FranceAgriMer. Test weights have been the focus of concerns about damage from heavy summer rain, hampering efforts to export French wheat to major markets like Algeria.

Wheat production totalled 36.1 million tonnes for marketing year 2020/21, down from a projected 36.7 million tonnes due to rainy summer weather that lowered yields, according to FranceAgriMer. Stratégie Grains has pegged the French soft wheat crop lower, at 35.4 million tonnes.

The French barley crop totalled 12.4 million tonnes. It withstood the wet harvest conditions, and quality remains satisfactory.

Harvest 2021 – wheat quality (average)

- Test weight – 20% of wheats exceeded 76 kg/hl
- Protein – 11.9%
- Hagberg Falling Number – 67% of wheats collected above 220 seconds
- W (baking strength) – 182
- P/L value – 0.7
- Wet gluten – 23.6%

Source: FranceAgriMer/ARVALIS – Institut du Végétal, Inland Silos Quality Survey 2021

Exports

With much of this season's rain-affected French soft wheat crop failing to meet the usual milling standard, French exporters may struggle to meet the quality required by their long-term buyers in North Africa, with stockfeed buyers in the Middle East and Asia being likely alternatives.

France is projected to ship 8.9 million tonnes of wheat to Britain and other countries outside the EU, compared with 7.6 million tonnes to the EU. French barley exports to EU markets are estimated to total 2.7 million tonnes compared with 3.2 million tonnes to non-EU markets.

China is set to remain a large export market for French wheat and barley this season, helped by trade disputes with some of its major traditional suppliers. French soft wheat exports to China are estimated at around 2 million tonnes in 2020/21, surpassing already large volumes in the past two seasons. Approximately 2 million tonnes of French barley have entered the Chinese market, making China the largest recipient of French barley in 2021/22.

Sales to Algeria – France's largest wheat export market – remains strong at 3.8 million tonnes this season, despite stiff competition from Baltic and Black Sea countries. French wheat sales to Egypt, one of the world's largest wheat importers, have dropped to 0.7 million tonnes, with Russia and Ukraine taking the lion's share of the Egyptian wheat market.

Main ports in France

Ports	Grain export volume (million tonnes)	Storage capacity (million tonnes)	Maximum tonnage per vessel (tonnes)
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 Céréales

Classification of French wheat

Categories	Protein (%)	Baking strength (W)	Specific weight (kg/hl)	Hagberg Falling Number (seconds)
Premium	11.5 min	170 min	77 min	240 min
Superior	11.5 min	Not specified	76 min	220 min*
Medium	11.0 min	Not specified	Not specified	170 min*
Access	Specified in contract	Not specified	Not specified	-

*Superior- and medium-grade wheats can be used without reference to the Hagberg Falling Number

Source: FranceAgriMer

French wheat and barley exports

Wheat

Units = tonnes	2020		2019
Algeria	3,865,899	Algeria	4,326,717
China	2,541,843	Belgium	2,227,869
Belgium	1,881,363	Netherlands	2,011,892
Morocco	1,676,552	Morocco	1,579,721
Netherlands	1,621,831	Spain	1,278,786
Spain	1,120,550	Italy	956,106
Italy	912,692	Egypt	751,330
Egypt	746,567	Portugal	647,907
Portugal	589,952	China	641,126
Cote d'Ivoire	544,020	Cote d'Ivoire	457,544
Angola	296,550	Cuba	387,280
Cuba	254,195	Angola	340,248
Germany	245,477	Germany	338,191
Senegal	240,013	Cameroon	270,125
Cameroon	235,700	Senegal	269,768

Source: IHS Maritime & Trade – Global Trade Atlas® – Eurostat

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Barley

Units = tonnes	2020		2019
China	2,000,000	Belgium	1,677,315
Belgium	1,599,580	China	1,232,345
Netherlands	732,589	Netherlands	1,019,380
Germany	501,900	Germany	729,858
Saudi Arabia	460,248	Saudi Arabia	461,645
Morocco	441,717	Morocco	355,912
Spain	249,923	Iran	201,300

Mexico	227,664	Spain	193,456
Algeria	179,780	Italy	154,693
Italy	116,476	Mexico	133,911
Turkey	53,702	Algeria	121,696
Portugal	46,012	India	100,279
South Africa	32,870	Tunisia	85,397
Austria	28,865	Libya	74,910

Source: IHS Maritime & Trade: Global Trade Atlas ® – Eurostat

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Supply and demand

As at Feb 2022 Units = thousand tonnes	2021/22 Wheat	2021/22 Barley	2022/23 Wheat (forecast)	2022/23 Barley (forecast)
Beginning stocks	2,180	835	3,7328	1,105
Production	35,409	11,465	35,910	11,238
Imports	333	128	333	143
Total supply	37,923	12,428	39,571	12,486
Exports	16,597	6,064	17,691	5,940
Feed domestic consumption	7,259	3,307	7,501	3,310
FSI consumption	9,704	1,627	9,683	1,648
Domestic consumption	17,998	5,258	18,400	5,295
Ending stocks	3,328	1,105	3,479	1,250

Source: Stratégie Grains