



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Voluntary Report - public distribution

Date: 8/6/2001

GAIN Report #GM1021

Germany

Grain and Feed

Grain Harvest

2001

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Report Highlights:

German grain harvest 2001 is forecast to reach a record level of 47.2 MMT. As a result of the BSE crisis and the EU MBM feeding ban, feed use of grains is foreseen to increase to 23.1 MMT in MY 2001/02.

Includes PSD changes: Yes
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1], GM

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Executive Summary

This report updates German official grain area data and the FAS forecast for the German grain crop 2001 from the earlier report in March 2001. FAS Germany forecasts the German grain crop at 47.2 million metric tons (mmt) produced on 7.058 million hectares which is actually 650,000 mt more than recently forecast by COCERAL, the European grain traders association. Both grain area and total harvest represent record levels for Germany.

Grain harvest is already in full swing by mid-July, and the regions report higher winter barley yields than in the summer of 2000. Also winter wheat development is reportedly favorable with average yields in the neighborhood of the earlier record year 1999. Only the outlook for spring barley is negative because of the very late planting. Rainy weather prevented timely planting in March. Corn is also forecast not to reach record highs again as in 2000. The late planting put corn behind normal development. However, current rainy weather may support plant development in corn.

Table 1: German Grain Crop Forecast 2001						
		2000			2001*	
	Area	Yield	Production		Yield	Production
	1000 ha	MT/ha	1,000 MT	1000 ha	MT/ha	1,000 MT
Winter Wheat	2,914	7.32	21,325	2,889	7.60	21,945
Spring Wheat	47	5.43	253	37	5.60	209
Durums	9	5.05	43	9	5.10	46
All Wheat	2,969	7.28	21,622	2,935	7.56	22,200
Rye	843	4.93	4,154	815	5.52	4,500
Winter Barley	1,446	6.38	9,232	1,495	6.54	9,770
Spring Barley	621	4.63	2,874	637	4.60	2,930
All Barley	2,068	5.86	12,106	2,132	5.96	12,700
Oats	237	4.59	1,087	211	4.74	1,000
Spring Mixed	29	4.29	125	30	4.50	135
Winter Mixed	10	5.38	54	10	5.45	55
Triticale	499	5.61	2,800	541	6.12	3,310
All	539	5.53	2,979	581	6.02	3,500
Corn	361	9.21	3,324	383	8.62	3,300
Grand Total	7,016	6.45	45,271	7,058	6.69	47,200

As result of the BSE crisis in Europe feeding patterns of livestock have changed. Aside from soybean meals domestically produced grains are also taking advantage of the feeding ban for meat and bone meals and animal fats. Total grain use in feeding is forecast to rise 23.1 mmt in MY 2001/02 (July/June). A further rise in grain feeding in the following years is most likely as the discussion about gene-technology continues to be controversial. The biggest growth in grain feeding is forecast for wheat, reaching 8.5 mmt in MY 2001/02. Domestic demand for barley is rather limited and not predicted to exceed the 7.0 mmt line. Barley finds a promising outlet in Saudi Arabia and other Near-East markets. Rye is a typical intervention grain and will continue to cause problems to the EU intervention system since also international customers are not very interested in this commodity because of its relative low feeding properties. Of growing importance to the feed markets is triticale which has better feeding properties than rye but is produced in similar locations than rye.

Table 2: PS+D Summary					
All Grains	97/98	98/99	99/00	00/01	01/02
Area harvested	7,014	7,042	6,634	7,017	7,057
Begin Stocks	8,612	11,814	13,734	11,404	9,269
Production	45,486	44,575	44,452	45,272	47,200
Tot Mkt Yr Imports	2,245	2,681	2,764	3,017	2,390
Oct/Sep Imp	2,182	2,847	2,618	3,087	2,390
Oct/SepImp US	80	27	52	68	65
Tot Supply	56,343	59,070	60,950	59,693	58,859
Tot Mkt Yr Export	7,834	7,895	13,076	12,705	11,830
Oct/Sep Export	7,861	8,736	14,434	12,325	11,830
Feed Dom Consump	21,956	23,099	20,724	22,650	23,100
Tot Dom Consump	36,695	37,441	36,470	37,719	38,200
Ending Stocks	11,814	13,734	11,404	9,269	8,829
Tot Distrib	56,343	59,070	60,950	59,693	58,859

Table 3: PS+D Wheat

PSD Table						
Country	Germany					
Commodity	Wheat				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Harvested	2601	2601	2970	2969	0	2935
Beginning Stocks	3830	2577	3000	2177	3400	2749
Production	19615	19615	21600	21622	0	22200
TOTAL Mkt. Yr. Imports	2000	1099	1750	1300	0	900
Jul-Jun Imports	2000	1099	1750	1300	0	900
Jul-Jun Import U.S.	0	38	0	50	0	50
TOTAL SUPPLY	25445	23291	26350	25099	3400	25849
TOTAL Mkt. Yr. Exports	6000	5931	5500	5800	0	6500
Jul-Jun Exports	6000	5931	5500	5800	0	6500
Feed Dom. Consumption	9427	6502	10250	8300	0	8500
TOTAL Dom. Consumption	16445	15183	17450	16550	0	16700
Ending Stocks	3000	2177	3400	2749	0	2649
TOTAL DISTRIBUTION	25445	23291	26350	25099	0	25849

Table 4: PS+D Rye

PSD Table						
Country	Germany					
Commodity	Rye				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Harvested	748	748	840	843	0	815
Beginning Stocks	4646	4039	4455	3644	3785	3813
Production	4329	4329	4150	4154	0	4500
TOTAL Mkt. Yr. Imports	80	20	80	15	0	15
Oct-Sep Imports	70	14	70	15	0	15
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	9055	8388	8685	7813	3785	8328
TOTAL Mkt. Yr. Exports	1800	2036	1800	1300	0	1600
Oct-Sep Exports	1850	2169	1800	1300	0	1600
Feed Dom. Consumption	1650	1400	1950	1400	0	1600
TOTAL Dom. Consumption	2800	2708	3100	2700	0	2900
Ending Stocks	4455	3644	3785	3813	0	3828
TOTAL DISTRIBUTION	9055	8388	8685	7813	0	8328

Table 5: PS+D Barley

PSD Table						
Country	Germany					
Commodity	Barley				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Harvested	2210	2210	2070	2068	0	2132
Beginning Stocks	6154	6029	5155	4463	3055	1799
Production	13301	13301	12100	12106	0	12700
TOTAL Mkt. Yr. Imports	600	519	500	650	0	400
Oct-Sep Imports	600	498	500	650	0	400
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	20055	19849	17755	17219	3055	14899
TOTAL Mkt. Yr. Exports	4500	4545	5000	4900	0	3000
Oct-Sep Exports	4500	5769	4400	4500	0	3000
Feed Dom. Consumption	7000	6823	6500	6700	0	6600
TOTAL Dom. Consumption	10400	10841	9700	10520	0	10450
Ending Stocks	5155	4463	3055	1799	0	1449
TOTAL DISTRIBUTION	20055	19849	17755	17219	0	14899

Table 6: PS+D Oats

PSD Table						
Country	Germany					
Commodity	Oats				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Harvested	268	268	235	237	0	211
Beginning Stocks	274	240	218	237	153	170
Production	1339	1339	1100	1087	0	1000
TOTAL Mkt. Yr. Imports	60	74	60	120	0	70
Oct-Sep Imports	60	85	60	120	0	70
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1673	1653	1378	1444	153	1240
TOTAL Mkt. Yr. Exports	25	27	25	25	0	30
Oct-Sep Exports	25	28	25	25	0	30
Feed Dom. Consumption	1000	1032	800	900	0	700
TOTAL Dom. Consumption	1430	1389	1200	1249	0	1050
Ending Stocks	218	237	153	170	0	160
TOTAL DISTRIBUTION	1673	1653	1378	1444	0	1240

Table 7: PS+D Mixed Grains and Triticale

PSD Table						
Country	Germany					
Commodity	Mixed Grain				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Harvested	436	436	540	539	0	581
Beginning Stocks	0	231	0	170	0	171
Production	2611	2611	3000	2979	0	3500
TOTAL Mkt. Yr. Imports	0	3	0	2	0	5
Oct-Sep Imports	0	3	0	2	0	5
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	2611	2845	3000	3151	0	3676
TOTAL Mkt. Yr. Exports	0	77	0	80	0	150
Oct-Sep Exports	0	59	0	100	0	150
Feed Dom. Consumption	2469	2377	2900	2650	0	3000
TOTAL Dom. Consumption	2611	2598	3000	2900	0	3300
Ending Stocks	0	170	0	171	0	226
TOTAL DISTRIBUTION	2611	2845	3000	3151	0	3676

Table 8: PS+D Corn

PSD Table						
Country	Germany					
Commodity	Corn				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Harvested	371	371	365	361	0	383
Beginning Stocks	446	617	640	712	890	566
Production	3257	3257	3250	3324	0	3300
TOTAL Mkt. Yr. Imports	1000	1024	1100	930	0	1000
Oct-Sep Imports	1000	894	1100	1000	0	1000
Oct-Sep Import U.S.	0	11	0	18	0	15
TOTAL SUPPLY	4703	4898	4990	4966	890	4866
TOTAL Mkt. Yr. Exports	450	460	400	600	0	550
Oct-Sep Exports	450	478	400	600	0	550
Feed Dom. Consumption	2650	2565	2700	2700	0	2700
TOTAL Dom. Consumption	3613	3726	3700	3800	0	3800
Ending Stocks	640	712	890	566	0	516
TOTAL DISTRIBUTION	4703	4898	4990	4966	0	4866