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# France

# Grain and Feed

# Annual

# 2000

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**Report Highlights: Another large grain crop is expected for France's MY 2000/2001 as area planted to grain are up. This increase follows France's big MY 1999/2000 grain crop. A growing share of the wheat crop is used domestically for feed and for industry processing, while milling uses are stagnant. MY 1998/99 grain exports were up significantly, especially for wheat. Flour exports fell a further 19 percent in MY 1998/99 to 1.05 MMT, due to lower import demand overseas and an accrued competition from other flour exporters. Carry-over grain stocks, although slightly decreasing, are expected to remain large, putting pressure on grain prices and possible shortage of storage space at the beginning of MY 2000/2001.**

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Includes PSD changes: Yes
Includes Trade Matrix: Yes
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## Executive Summary

In MY 1999/2000, France had a large grain crop. The MY 2000/2001 grain crop is expected to be nearly as large, since soft wheat plantings are up by 2 percent and barley plantings are up by 2.5 percent. It appears that most grain farmers choose to plant wheat even if wheat prices are depressed, since they have more experience in the cultivation of wheat, and can get, on average, a minimum and decent income with wheat cultivation.

However, current weather conditions with an excess of moisture could hamper the crops' potential by increasing diseases and lowering nitrogen availability in the soil, conditions similar to MY 1997/98. Such condition, if not corrected with supplementary fertilizers by grain farmers, could lower the protein content of the crop. It is still too early to forecast accurately MY 1999/2000 corn plantings, but most analysts believe that the corn area will be up slightly, since oilseed prices are low and compensatory payments are down due to the CAP reform.

For MY 1999/2000, the French wheat sector has set quality classes for wheat with the intention of better rewarding producers on quality criteria such as the protein content, which is a weak point for French wheat.

Feed uses of grain, especially wheat, may suffer from stagnant demand in the poultry and pork sector. Industry uses of grain, especially wheat, are also on the increase. France is the largest wheat starch exporter in the world, with 2.1 million MT of wheat used for starch production in MY 1999/2000. Flour uses for the domestic market are up marginally, but due to weak export demand, French millers are cutting by half their export milling capacity, with financial help from the State.

Grain carry-over stocks, especially intervention stocks, although slightly decreasing, are expected to remain high at the end of MY 1999/200. This could lead to some storage shortages in MY 2000/2001 if the crop is large and despite the building of new elevators.

Overall grain exports in MY 1999/2000 are well above their MY 1998/99 level, especially for wheat, thanks to large shipments to EU countries but also Iran and Algeria. Barley exports are down from the high level of MY 1998/99, but there are still some strong hopes of large shipments of French barley for Saudi Arabia. Exports of corn are also up. Flour exports still suffer from increased competition from other EU countries as well as lower demand from importing countries which are building their own milling industries.

## DATA SOURCES

Data sources for this report include the French Grain Board (ONIC), French Ministry of Agriculture (MinAg), the Strategy Grain newsletter, French Wheat Growers Association (AGPB), French Corn Growers Association (AGPM), French Cooperative Association (AFCAT), French Export Millers Syndicate (SYMEX), French Technical Institute for Cereal and Forage (ITCF), French Financial Organization for the Grain Sector (UNIGRAINS), and other trade contacts.

Note that the report narrative has been truncated according to FAS/W guidance.

## GRAIN OUTLOOK, PRODUCTION

### Crop Area

According to ONIC and MinAg planting estimates, farmers will cultivate more than 5 million hectares of soft wheat for MY 2000/2001, up more than 2 percent from the level of MY 1999/2000. Winter barley plantings are estimated at 1.2 million hectares, up 2.8 percent from MY 1999/2000 winter barley plantings. Because barley area represents about 30 percent of total barley and is also expected to grow due to the current good price premium for malting barley, barley plantings could rise 2.5 percent in MY 2000/2001. In fact, facing lower voluntary set-aside payments as a result of the Common Agricultural Policy reform of April 1999 (Agenda 2000), and despite lower grain intervention prices, grain farmers chose to increase their wheat and barley plantings. This trend is reinforced by low oilseed market prices and lower oilseed compensatory payments mandated by Agenda 2000. On the other hand, fewer crop rotations in the fields will certainly increase the risk for wheat-specific diseases and pests.

It is still too early to forecast accurately the corn plantings for MY 2000/2001. However, decreasing sunflower yields (due to various diseases) and low sunflower prices, combined with relatively strong domestic corn prices, could encourage farmers to plant more corn. Post has chosen a moderate growth of 0.5 percent for its forecasts.

### Production

Production data have been updated using the latest source available. Crop forecasts for MY 2000/2001 have been made using ONIC long term projections for yield growth. Plantings of winter crops (wheat, durum, winter barley) were done in fall 1999 under relatively favorable weather conditions. To date, plant growth is much better than at the same date in 1999. However, January and February 2000 weather conditions (excessive rainfall and mild temperatures) could hamper future plant growth by creating a lack of nitrogen in the soil (see crop quality subsection). Morever, such mild temperatures could enhance the development of fungal diseases and insects, thus reducing the potential yield of the crop. This situation is very similar to the MY 1997/98 year when, due to excessive rainfall in winter, average wheat yields dropped to 6.8 MT per HA, from 7.3 MT per HA in MY 1996/97

### Crop Quality - Wheat

In MY 1999/2000, about 75 percent of wheat planted in France consisted of bread-making varieties. Although declining, SOISSONS is still the most cultivated variety, with 15 percent of the area harvested. About 60 percent of bread-making wheat is sorted as medium-hard wheat. Specific weights were above the MY 1998/99 level with an average of 78.5 KG per hectoliter (60.99 lb per bushel) with 90 percent of the crop above 76 KG per hectoliter (59.05 lb per bushel). Average water content was 13.2 percent moisture with 80 percent of the crop below 14 percent moisture. Average protein content is estimated at 11.1 percent.

Current weather conditions, with an excess of moisture, could lead to some quality problems for the MY 2000/2001 wheat crop. As rainfall drains nitrogen away from plant roots, this could induce low protein content in the kernels, as it occurred in MY 1997/98. However, as more and more grain farmers use scientific tools to measure the nitrogen level in their soil, they may be able to correct the nitrogen deficit before it impacts the crop.

**Crop Quality - Classification**

In 1999, the French wheat board established a classification table for French wheat:

| Classes | Protein content | Bread Making strength | Hagberg index | Physical criteria (*) |
|---|---|---|---|---|
| **E** | $12 % | $ 250 | $220 | 76 / 15 / 4 / 2 / 2 |
| **1** | 11 - 12,5 % | 160 -250 | $220 | 76 / 15 / 4 / 2 / 2 |
| **2** | 10,5 - 11,5 % | depending on contract | $180 | 76 / 15 / 4 / 2 / 2 |
| **3a** | < 10,5 % | non specified | non specified | SW $74 / 15 / 4 / 2 / 2 |
| **3b** | | | | SW < 74 / 15 / 4 / 2 /2 |

(*) Specific Weight (SW)/ maximum moisture content / broken kernels / germinated kernels / impurities
*(Source ONIC)*

This classification was first used for the MY 1999/2000 wheat crop. It is now widely used by domestic grain traders and appears on Incograin forms. According to trade sources, this is the first efficient step toward rewarding producers' efforts for better quality. ONIC is also subsidizing local grain cooperatives for purchasing grain analyzers to sort the wheat according to its protein content. It will help them to give premiums to farmers who achieve higher protein levels in their crop. The ultimate goal would be to raise the average quality, especially in terms of protein content and specific weight of the French wheat crop.

## GRAIN OUTLOOK, CONSUMPTION

**Feed Use of Grain**
Following the CAP reform of 1992 that led to a decrease in EU grain prices, feed uses of grains have increased sharply in France, especially feed uses of wheat, to the detriment of non-grain feed ingredients (NGFI) such as manioc and corn gluten feed. From 30 percent in 1991, the share of grain in manufactured feed has grown to 45 percent in 1998, according to a study by the Ministry of Agriculture.

**Feed uses of grain in France (in thousand MT)**

| (1000 MT) | On-farm Consumption | | Feed Manufacturers | | Total feed consumption | |
|---|---|---|---|---|---|---|
| MY | MY 1999/2000 | MY 1998/99 | MY 1999/2000 | MY 1998/99 | MY 1999/2000 | MY 1998/99 |
| Soft wheat | 4,051 | 3,668 | 6,616 | 6,766 | 10,667 | 10,434 |
| Barley | 2,400 | 2,429 | 923 | 1,073 | 3,323 | 3,502 |
| Corn | 1,849 | 1,734 | 3,285 | 3,352 | 5,134 | 5,086 |
| Rye | 105 | 107 | 28 | 27 | 133 | 134 |
| Oats | 340 | 351 | 193 | 182 | 533 | 533 |

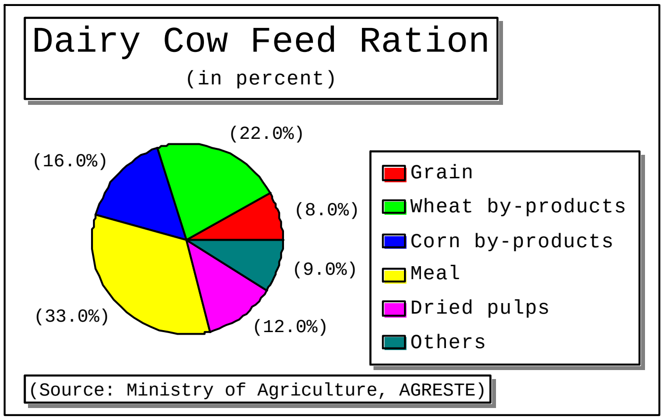
| | | | | | | |
|---|---|---|---|---|---|---|
| Sorghum | 47 | 50 | 33 | 47 | 80 | 97 |
| Triticale | 827 | 778 | 357 | 428 | 1,184 | 1,206 |
| **All Grain** | **9,619** | **9,117** | **11,435** | **11,875** | **21,054** | **20,992** |

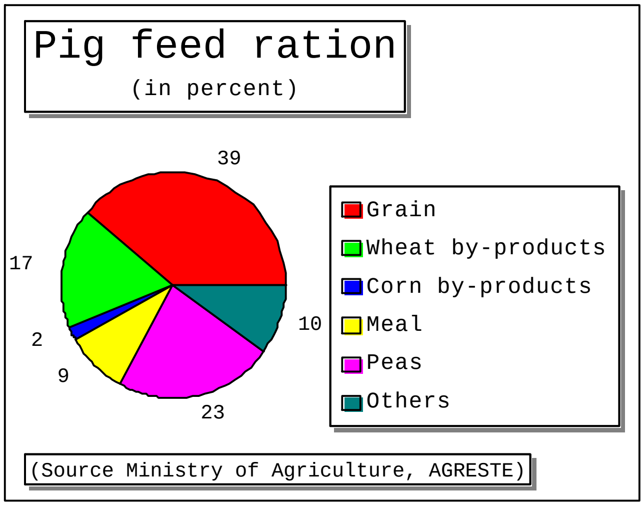
*(Source: ONIC and Post's calculation)*
(Note: On-farm consumption data is only an estimate and probably includes some grain used as on-farm seed. Precise and reliable data do not exist for grain on-farm consumption. MY 1999/2000 figures are forecasts.)

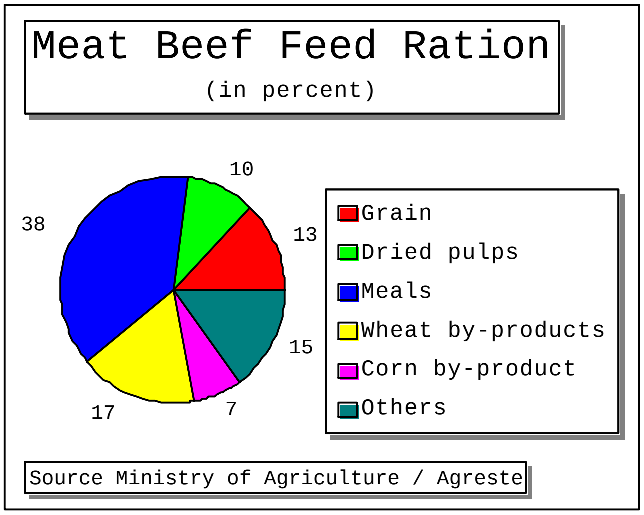
According to some experts, on-farm consumption is not likely to increase sharply for various reasons. Some farmers prefer to buy manufactured feed because it is better for cattle growth. Moreover, some believe that on-farm consumption is approaching its limit since cattle and poultry production are concentrated in the western part of France, but the main grain producers are in the regions of the Centre, Champagne, Picardie, and the Paris basin.

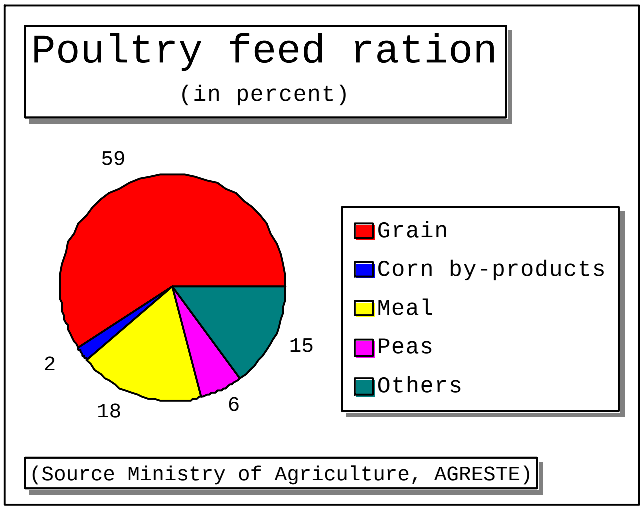
Feed uses of grain is expected to remain stagnant in MY 1999/2000: both poultry and pork production are expected to decrease. Moreover, due to the current low price of protein, grain is not price competitive.

**Feed rations**






**Industrial Uses**
Industrial uses of grain, especially wheat, have increased sharply since the early 1990's. Soft wheat uses for starch production reached 1.9 million MT in 1998/99 and are expected to reach 2.15 million MT in 1999/2000. France is the largest wheat starch exporter in the world, with more than 31 percent of the total wheat starch world trade. A new plant in the Picardie region of France began operation in 1997. Built on 68 hectares, it has almost doubled the French wheat starch production. From an initial capacity of 750,000 MT of wheat, the plant capacity will increase to 1 MMT of wheat within the next few years. On the other hand, corn use for starch remained stagnant at 560,000 MT in MY1997/98 and MY 1998/99. Domestic uses of barley for malting also remained stagnant at 120,000 MT yearly, despite a new malting plant being built in Rouen by the grain group SOUFFLET, as the increase in malting capacity is targeted at exports.

**Milling**

**Flour PS&D (MT, grain equivalent)**

| MY (Jul-Jun) | 96/97 | 97/98 | 98/99 |
|---|---|---|---|
| Beginning stocks | 154,334 | 172,327 | 170,467 |
| **Flour production** | **7,909,999** | **7,943,440** | **7,919,895** |
| Flour imports | 511,869 | 514,065 | 471,981 |
| **Total Supply** | **8,576,202** | **8,629,832** | **8,562,343** |
| Exports EU | 166,894 | 220,013 | 197,502 |
| **Total Exports** | **2,238,208** | **1,771,273** | **1,398,719** |
| Bakery uses | 3,075,792 | 3,107,165 | 3,071,850 |
| of which small bakers | 2,135,911 | 2,120,959 | 2,046,777 |
| of which industrial bakeries | 664,728 | 698,397 | 732,091 |
| Others food industry uses | 1,088,269 | 1,142,583 | 1,141,364 |
| Starch/Gluten industry | 1,111,836 | 1,513,147 | 1,920,047 |
| **Total domestic uses** | **6,165,667** | **6,688,092** | **7,004,384** |
| Ending stocks | 172,327 | 170,467 | 159,240 |
| **Total Distribution** | **8,576,426** | **8,629,832** | **8,562,343** |

*(Source ONIC)*

The French milling industry is undergoing major restructuring. The domestic market of small corner bakeries, although still large, is shrinking as more and more people buy their bread in supermarkets or hypermarkets. Thus, several small or medium-sized millers have either closed or have been bought by larger milling groups such as SOUFFLET or Grand Moulins de Paris.

Big milling groups have also suffered both from weak domestic demand and decreased exports. Many traditional importers such as Egypt and Yemen are building milling plants and starting to import grain instead of flour. To reduce overall capacity, ONIC and the milling industry have launched a program that will almost cut in half the French export milling capacity from 1.7 MMT of flour to 0.9 MMT. Some mills will be closed down and the milling equipment will be sold outside the EU. Companies such as Champagne Céréales and SCARM are completely withdrawing from the flour export business. The reduction plan is expected to be completed by 2001.

**Stocks and Storage**

The expected grain storage shortage for MY 1999/2000 did not happen, thanks to the building of storage capacity which was partly subsidized by ONIC and a lower grain crop. However, the situation remains tight. Carry-over stocks are not forecast to decrease significantly at the end of MY 1999/2000. Should the MY 2000/2001 crop be larger than expected, and shortages will happen. Seeing grain being stored outside, under tarpaulins, may not be uncommon again in France, as happened in MY 1997/98

## GRAIN OUTLOOK, TRADE

**General**
French grain exports (mostly wheat) are expected to increase substantially in MY 1999/00. French wheat exports to EU countries will benefit from lower grain crop in Denmark, Germany and United Kingdom. Exports to third countries are also expected to increase, thanks to large shipments to Algeria, Iran, and the United Arab Emirates. AgOffice's contacts confirmed that Iran was dissatisfied with the quality of early shipment of French wheat, which was coming out of intervention. They also mentioned that even though early Iranian contracts were not covered by COFACE (France's export credit insurance company), later shipments had such cover. It is also expected that to compete with U.S. GSM 103 programs, COFACE will cover French grain exports to Egypt.

A study published by the Ministry of Agriculture shows that since the CAP reform of 1992, restitutions have become only a marginal part of the extra-EU export prices. However, in 1997 and 1998, depressed grain prices increased the need for restitutions. One can forecast that 1999 and 2000 data would follow the trend. (See table below)

**Restitutions and French grain exports (1991/1997)**

| Year | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 |
|---|---|---|---|---|---|---|---|---|
| Total Grain exports | 31,691 | 34,963 | 36,603 | 29,110 | 30,794 | 29,679 | 31,237 | 31,352 |
| Intra-EU exports(MT) | 16,600 | 19,331 | 20,213 | 18,107 | 19,502 | 21,215 | 20,718 | 20,768 |
| Intra-EU export price (FF/MT) | 1,493 | 1,418 | 1,285 | 1,173 | 1,157 | 1,146 | 1,066 | 1,000 |
| Extra-EU exports | 15,091 | 15,632 | 16,390 | 11,003 | 11,292 | 8,463 | 10,519 | 10,584 |
| Extra EU export value (Million FF) | 8,899 | 11,320 | 11,952 | 7,782 | 9,401 | 9,948 | 10,474 | 8,540 |
| Total Restitutions (Million FF) | 12,775 | 9,109 | 8,132 | 4,269 | 3,112 | 353 | 1,377 | 1,720 |
| Sales + Restitutions (Million FF) | 21,674 | 20,429 | 20,084 | 12,051 | 12,513 | 9,301 | 11,851 | 10,260 |
| Extra-EU export price (FF/MT) | 590 | 724 | 729 | 707 | 833 | 1,057 | 996 | 807 |
| Restitutions (FF/MT) | 847 | 583 | 496 | 388 | 276 | 42 | 131 | 162 |
| Restitutions /Export price (Percent) | 144 | 80 | 68 | 55 | 33 | 4 | 16 | 20 |

*(Source Ministry of Agriculture/Comptes de l'Agriculture 1998/99)*

**Flour Trade**
French flour trade has been declining for the past few years, due to the increased competition from other EU countries such as Italy and Belgium. Moreover, France's traditional customers such as Egypt and Yemen are now building their own mills, thus importing grain instead of flour. However, France has kept a strong customer network in Africa and remains the major and sometimes sole supplier of flour to those countries. France is also exporting some flour as food aid to African countries. The French Flour Exporters'Association (SYMEX) has some hope of demand from Indonesia, due to the temporary disorganization of this country's grain sector after its privatization. Flour demand from Libya is also strong in MY 1999/2000 although Tunisian millers seem to be rather active in Libya in building up new mills. Finally, French flour exporters may benefit from lower supply in competing countries. Overall, SYMEX hopes that French flour exports in MY 1999/2000 will be only marginally down from MY 1998/99.

Wheat flour exports in MY 1997/98 and 1998/99 (July/June)(MT)

| | MY 1997/98 | MY 1998/99 |
|---|---|---|
| U.S. | 265 | 365 |
| Others: | | |
| Yemen | 235,377 | 134,392 |
| Libya | 147,773 | 78,794 |
| Algeria | 134,725 | 42,544 |
| Mauritania | 79,321 | 79,678 |
| Sudan | 61,047 | 51,132 |
| Angola | 51,938 | 50,117 |
| Sierra-Leone | 48,794 | 733 |
| Cuba | 40,915 | 26,100 |
| Viet Nam | 36,791 | 23,661 |
| Germany | 35,198 | 32,246 |
| Egypt | 32,846 | 3 |
| Guinea | 30,419 | 46,668 |
| FSU | 30,026 | 119 |
| Netherlands | 24,915 | 7,445 |
| Belgium/Lux | 23,402 | 29,978 |
| Niger | 22,224 | 24,639 |
| Rep Central African Republic | 19,925 | 22,576 |

| | | |
|---|---|---|
| Total of Others | 1,055,636 | 651,190 |
| Others not listed | 247,894 | 398,496 |
| Grand Total | 1,303,265 | 1,049,686 |

(Source: ONIC)

**Malt Trade**

| Malt barley exports for MY 1997/98 (July/June) | | | |
|---|---|---|---|
| Unit: MT, Grain equivalent | | | |
| | MY 1996/97 | MY 1997/98 | MY 1998/99 |
| Country | | | |
| U.S. | 133 | 178 | 235 |
| Others: | | | |
| Germany | 248,863 | 214,869 | 235,039 |
| Venezuela | 53,253 | 104,663 | 66,915 |
| Belgium/Lux | 68,748 | 91,729 | 97,473 |
| Russia | 54,366 | 89,595 | 88,452 |
| Japan | 67,371 | 81,809 | 101,011 |
| Italy | 80,956 | 80,923 | 71,404 |
| Brazil | 74,942 | 71,933 | 68,308 |
| Netherlands | 48,838 | 62,399 | 60,165 |
| Cameroon | 39,183 | 42,693 | 48,068 |
| Philippines | 40,391 | 40,973 | 35,874 |
| Viet-Nam | 49,798 | 33,539 | 32,861 |
| Thailand | 49,035 | 31,101 | 19,038 |
| United Kingdom | 20,580 | 28,144 | 26,298 |
| Switzerland | 26,260 | 22,867 | 24,779 |
| Cuba | 21,216 | 20,763 | 20,084 |
| Total of Others: | 943,801 | 1,018,000 | 995,769 |
| Others Not Listed | 276,106 | 291,756 | 296,855 |
| Grand total | 1,220,040 | 1,309,934 | 1,292,624 |

French malt trade is booming. New modern malting facilities in France are helping French malt gain some price competitiveness.

## TABLES

(IMPORTANT NOTE: Data discrepancies between PS&D trade figures and trade matrices are due to discrepancies in official French trade data. PS&D trade figures represent the best estimate of real trade while the trade matrices underestimate real trade.)

**Wheat**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | France | | | | | |
| Commodity | Wheat | | | | (1000 HA)(1000 MT) | |
| | Revised | 1998 | Preliminary | 1999 | Forecast | 2000 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 07/1998 | | 07/1999 | | 07/2000 |
| Area Harvested | 5234 | 5234 | 5220 | 5132 | 0 | 5400 |
| Beginning Stocks | 5100 | 4897 | 9660 | 8749 | 7750 | 7300 |
| Production | 39793 | 39793 | 37000 | 37160 | 0 | 39450 |
| TOTAL Mkt. Yr. Imports | 1275 | 302 | 1000 | 300 | 0 | 350 |
| Jul-Jun Imports | 1275 | 302 | 1000 | 300 | 0 | 350 |
| Jul-Jun Import U.S. | 5 | 0 | 0 | 0 | 0 | 0 |
| TOTAL SUPPLY | 46168 | 44992 | 47660 | 46209 | 7750 | 47100 |
| TOTAL Mkt. Yr. Exports | 18158 | 18168 | 19400 | 20300 | 0 | 19800 |
| Jul-Jun Exports | 18158 | 18168 | 19400 | 20300 | 0 | 19800 |
| Feed Dom. Consumption | 11850 | 10434 | 14000 | 10700 | 0 | 10500 |
| TOTAL Dom. Consumption | 18350 | 18075 | 20510 | 18609 | 0 | 18800 |
| Ending Stocks | 9660 | 8749 | 7750 | 7300 | 0 | 8500 |
| TOTAL DISTRIBUTION | 46168 | 44992 | 47660 | 46209 | 0 | 47100 |

Trade matrices below are for soft wheat only

| Import Trade Matrix | | | |
|---|---|---|---|
| Country | France | | |
| Commodity | Wheat | | |
| Time period | Jul-Jun | Units: | MT |
| Imports for: | 1997 | | 1998 |
| U.S. | 23498 | U.S. | 36690 |
| Others | | Others | |
| Germany | 241504 | Germany | 161596 |
| United Kingdom | 38757 | United Kingdom | 15590 |
| Denmark | 30207 | Belgium/Lux | 15143 |
| Belgium/Lux | 20267 | Italy | 9777 |

| | | | |
|---|---|---|---|
| Italy | 8901 | Austria | 6515 |
| Spain | 4991 | Spain | 4435 |
| Netherlands | 2356 | Netherlands | 2769 |
| Canada | 542 | Canada | 1435 |
| | | | |
| | | | |
| Total for Others | 347525 | | 217260 |
| Others not Listed | 5361 | | 4988 |
| Grand Total | 376384 | | 258938 |

| Export Trade Matrix | | | |
|---|---|---|---|
| Country | France | | |
| Commodity | Wheat | | |
| Time period | Jul-Jun | Units: | MT |
| Exports for: | 1997 | | 1998 |
| U.S. | | U.S. | |
| Others | | Others | |
| Italy | 2340093 | Italy | 2359933 |
| Netherlands | 1364435 | Netherlands | 1579413 |
| Belgium/Lux | 1298833 | Spain | 1381968 |
| Egypt | 1125238 | Belgium/Lux | 1374068 |
| Spain | 1081641 | Morocco | 1215213 |
| Morocco | 882431 | Egypt | 1159934 |
| Portugal | 756615 | Portugal | 832802 |
| Irak | 659377 | Cuba | 713948 |
| Cuba | 618785 | Germany | 664541 |
| Tunisia | 487896 | Algeria | 550349 |
| Total for Others | 10615344 | | 11832169 |
| Others not Listed | 2306771 | | 3756782 |
| Grand Total | 12922115 | | 15588951 |

**Durum**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | France | | | | | |
| Commodity | Wheat, Durum | | | | (1000 HA)(1000 MT) | |
| | Revised | 1998 | Preliminary | 1999 | Forecast | 2000 |

| | Old | New | Old | New | Old | New |
|---|---|---|---|---|---|---|
| Market Year Begin | | 01/1998 | | 01/1999 | | 01/2000 |
| Area Harvested | 294 | 296 | 320 | 328 | 0 | 340 |
| Beginning Stocks | 109 | 109 | 56 | 80 | 86 | 203 |
| Production | 1539 | 1545 | 1300 | 1517 | 0 | 1490 |
| TOTAL Mkt. Yr. Imports | 30 | 43 | 80 | 72 | 0 | 80 |
| Jul-Jun Imports | 37 | 43 | 80 | 72 | 0 | 80 |
| Jul-Jun Import U.S. | 0 | 0 | 5 | 5 | 0 | 0 |
| TOTAL SUPPLY | 1678 | 1697 | 1436 | 1669 | 86 | 1773 |
| TOTAL Mkt. Yr. Exports | 890 | 1055 | 600 | 730 | 0 | 800 |
| Jul-Jun Exports | 890 | 1055 | 600 | 730 | 0 | 800 |
| Feed Dom. Consumption | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Dom. Consumption | 732 | 562 | 750 | 736 | 0 | 873 |
| Ending Stocks | 56 | 80 | 86 | 203 | 0 | 100 |
| TOTAL DISTRIBUTION | 1678 | 1697 | 1436 | 1669 | 0 | 1773 |

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | France | | |
| Commodity | Wheat, Durum | | |
| Time period | Jul-Jun | Units: | MT |
| Imports for: | 1997 | | 1998 |
| U.S. | 130 | U.S. | 284 |
| Others | | Others | |
| Spain | 77495 | Spain | 24530 |
| Canada | 45044 | Germany | 12681 |
| Greece | 35913 | Belgium/Lux | 4397 |
| Italy | 30217 | | |
| Germany | 8656 | | |
| Belgium/Lux | 6373 | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 203698 | | 41608 |
| Others not Listed | 1559 | | 1461 |
| Grand Total | 205387 | | 43353 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Wheat, Durum | | |
| Time period | Jul-Jun | Units: | MT |
| Exports for: | 1997 | | 1998 |
| U.S. | | U.S. | |
| Others | | Others | |
| Belgium/Lux | 169705 | Italy | 382143 |
| Italy | 103837 | Belgium | 263433 |
| Germany | 49425 | Germany | 154073 |
| Spain | 35402 | Spain | 95868 |
| Netherlands | 19200 | Netherlands | 53037 |
| Algeria | 5500 | United Kingdom | 27971 |
| United Kingdom | 5013 | Greece | 20596 |
| Greece | 3069 | Portugal | 17562 |
| Morocco | 2945 | Tunisia | 5700 |
| Portugal | 1817 | Turkey | 5541 |
| Total for Others | 395913 | | 1025924 |
| Others not Listed | 3319 | | 24650 |
| Grand Total | 399232 | | 1050574 |

**Barley**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | France | | | | | |
| Commodity | Barley | | | | (1000 HA)(1000 MT) | |
| | Revised | 1998 | Preliminary | 1999 | Forecast | 2000 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 07/1998 | | 07/1999 | | 07/2000 |
| Area Harvested | 1631 | 1631 | 1530 | 1538 | 0 | 1570 |
| Beginning Stocks | 2674 | 2847 | 2210 | 1956 | 1610 | 1000 |
| Production | 10591 | 10591 | 9700 | 9670 | 0 | 9750 |
| TOTAL Mkt. Yr. Imports | 88 | 20 | 50 | 25 | 0 | 25 |
| Oct-Sep Imports | 100 | 24 | 50 | 30 | 0 | 25 |
| Oct-Sep Import U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL SUPPLY | 13353 | 13458 | 11960 | 11651 | 1610 | 10775 |
| TOTAL Mkt. Yr. Exports | 6393 | 6455 | 5600 | 5800 | 0 | 5500 |
| Oct-Sep Exports | 6500 | 6750 | 5900 | 5800 | 0 | 5500 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Feed Dom. Consumption | 3000 | 3450 | 3000 | 3323 | 0 | 3000 |
| TOTAL Dom. Consumption | 4750 | 5047 | 4750 | 4851 | 0 | 4475 |
| Ending Stocks | 2210 | 1956 | 1610 | 1000 | 0 | 800 |
| TOTAL DISTRIBUTION | 13353 | 13458 | 11960 | 11651 | 0 | 10775 |

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | France | | |
| Commodity | Barley | | |
| Time period | Jul-Jun | Units: | |
| Imports for: | | | 1 |
| U.S. | | U.S. | |
| Others | | Others | |
| Germany | 18632 | Belgium/Lux | 9504 |
| Belgium/Lux | 14681 | Germany | 9110 |
| Netherlands | 3007 | Spain | 586 |
| United Kingdom | 2309 | Netherlands | 361 |
| Denmark | 2249 | | |
| Spain | 1187 | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 42065 | | 19561 |
| Others not Listed | 1356 | | 457 |
| Grand Total | 43421 | | 20018 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Barley | | |
| Time period | Jul-Jun | Units: | MT |
| Exports for: | 1997 | | 1998 |
| U.S. | | U.S. | |
| Others | | Others | |
| Belgium/Lux | 1121796 | Saudi Arabia | 1610901 |
| Netherlands | 374511 | Belgium/Lux | 1125078 |
| Saudi Arabia | 325416 | Netherlands | 553666 |
| Italy | 316489 | Morocco | 530978 |

| | | | |
|---|---|---|---|
| Germany | 262601 | Germany | 423052 |
| China | 103610 | Italy | 406301 |
| Portugal | 87056 | Algeria | 364271 |
| Spain | 66695 | Lybia | 290185 |
| Algeria | 59470 | China | 171755 |
| Morocco | 43078 | Turkey | 95104 |
| Total for Others | 2760722 | | 5571291 |
| Others not Listed | 432204 | | 846868 |
| Grand Total | 3192926 | | 6418159 |

| import Barley oct/sept | |
|---|---|
| Period: Oct98/Sept99 | Unit: MT |
| Countries | total Oct/Sept |
| US | 0 |
| Others: | |
| Belgium | 11399 |
| Germany | 9084 |
| Total of others | 20483 |
| Others not listed | 3305 |
| Grand Total | 23788 |

| export Barley oct/sept | |
|---|---|
| Period: Oct98/Sept99 | Unit:MT |
| Countries | total Oct/Sept |
| US | 0 |
| Others: | |
| Saudi Arabia | 1834902 |
| Belgium | 1052926 |
| Morocco | 552635 |
| Netherlands | 549796 |
| Italy | 478843 |
| Germany | 454793 |
| Algeria | 371421 |
| Syria | 219311 |
| Lybia | 166513 |
| Greece | 93198 |
| Turkey | 72448 |
| Portugal | 59254 |

| | |
|---|---|
| Spain | 43218 |
| Total of others | 4114356 |
| Others not listed | 2631845 |
| Grand Total | 6746201 |

**Corn**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | France | | | | | |
| Commodity | Corn | | | | (1000 HA)(1000 MT) | |
| | Revised | 1998 | Preliminary | 1999 | Forecast | 2000 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 07/1998 | | 07/1999 | | 07/2000 |
| Area Harvested | 1799 | 1759 | 1750 | 1738 | 0 | 1750 |
| Beginning Stocks | 2414 | 3054 | 2121 | 2482 | 2511 | 2700 |
| Production | 15204 | 14766 | 15500 | 15356 | 0 | 14525 |
| TOTAL Mkt. Yr. Imports | 214 | 235 | 190 | 201 | 0 | 200 |
| Oct-Sep Imports | 200 | 245 | 200 | 200 | 0 | 200 |
| Oct-Sep Import U.S. | 1 | 11 | 0 | 5 | 0 | 5 |
| TOTAL SUPPLY | 17832 | 18055 | 17811 | 18039 | 2511 | 17425 |
| TOTAL Mkt. Yr. Exports | 8111 | 8271 | 7300 | 7900 | 0 | 7500 |
| Oct-Sep Exports | 7700 | 8107 | 7300 | 7500 | 0 | 7500 |
| Feed Dom. Consumption | 6200 | 5086 | 6650 | 5150 | 0 | 5000 |
| TOTAL Dom. Consumption | 7600 | 7302 | 8000 | 7439 | 0 | 7425 |
| Ending Stocks | 2121 | 2482 | 2511 | 2700 | 0 | 2500 |
| TOTAL DISTRIBUTION | 17832 | 18055 | 17811 | 18039 | 0 | 17425 |

| Import Trade Matrix | | | |
|---|---|---|---|
| Country | France | | |
| Commodity | Corn | | |
| Time period | Jul-Jun | Units: | MT |
| Imports for: | 1997 | | 1998 |
| U.S. | 16409 | U.S. | 11615 |
| Others | | Others | |
| Germany | 116519 | Germany | 113364 |
| Argentina | 39631 | Argentina | 51582 |
| Italy | 10111 | Italy | 13196 |
| Chile | 8041 | Hungary | 17888 |

| | | | |
|---|---|---|---|
| Netherlands | 5209 | Canada | 6061 |
| Canada | 4648 | Chile | 4403 |
| Hungary | 4575 | Netherlands | 2867 |
| Spain | 2437 | Belgium/Lux | 2752 |
| Belgium/Lux | 1567 | Spain | 2393 |
| | | Austria | 706 |
| Total for Others | 192738 | | 215212 |
| Others not Listed | 18927 | | 7617 |
| Grand Total | 228074 | | 234444 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Corn | | |
| Time period | Jul-Jun | Units: | MT |
| Exports for: | 1997 | | 1998 |
| U.S. | | U.S. | |
| Others | | Others | |
| Spain | 1740078 | Netherlands | 1709459 |
| Netherlands | 1711286 | Spain | 1456327 |
| United Kingdom | 1169845 | Italy | 1125635 |
| Belgium/Lux | 824853 | United Kingdom | 1175245 |
| Germany | 807229 | Germany | 850357 |
| Portugal | 557114 | Belgium/Lux | 536448 |
| Italy | 268744 | Portugal | 527788 |
| Greece | 288382 | Greece | 476913 |
| Denmark | 15185 | Ireland | 146122 |
| Switzerland | 10395 | Denmark | 32847 |
| Total for Others | 7393111 | | 8037141 |
| Others not Listed | 300845 | | 210120 |
| Grand Total | 7693956 | | 8247261 |

| | |
|---|---|
| import Corn oct/sept | |
| Period: Oct 98/Sept99 | Unit: MT |
| Countries | total Oct/Sept |
| US | 11703 |
| Others: | |
| Germany | 125574 |

| | |
|---|---|
| Argentina | 52692 |
| Hungary | 14047 |
| Italy | 12178 |
| Canada | 6061 |
| Netherlands | 5193 |
| Chile | 4382 |
| Spain | 3047 |
| Belgium/Lux | 1704 |
| Total of others | 224878 |
| Others not listed | 8246 |
| Grand Total | 244827 |

| export Corn oct/sept | |
|---|---|
| Period: Oct98/Sept99 | Unit: MT |
| Countries | total Oct/Sept |
| US | 0 |
| Others: | |
| Netherland | 1632345 |
| Italy | 1315269 |
| Spain | 1297459 |
| UK | 1173188 |
| Germany | 822627 |
| Belgium/Lux | 540177 |
| Portugal | 520097 |
| Total of others | 7301162 |
| Others not listed | 806455 |
| Grand Total | 8107617 |