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France

Oilseeds and Products

Oilseeds Update

2001

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Report Highlights:

Brazil is now France's leading soybean supplier, with 53 percent of the market, while the United States ranks second, with 33 percent. U.S. soybean exports to France have been relatively stable, while Brazilian shipments to France have skyrocketed. French oilseed production in MY 2001/02 is expected to include 2.89 million MT of rapeseed, 1.75 million MT of sunflowerseed, and 314,000 MT of soybeans. French imports of soybeans almost doubled from MY 99/00 to MY 00/01, since the domestic demand for soybean meals has increased to partially replace meat and bone meal banned from animal feed rations since November 2000.

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Executive Summary

French oilseed production in MY 2001/02 is expected to include 2.89 million MT of rapeseed, 1.75 million MT of sunflowerseed, and 314,000 MT of soybeans. French imports of soybeans almost doubled from MY 99/00 to MY 00/01, since the domestic demand for soybean meal has increased to partially replace meat and bone meal banned from animal feed rations since November 2000. However, U.S. soybean exports to France have been relatively stable, while Brazilian shipments to France have skyrocketed. Brazil is now France's leading soybean supplier, with 53 percent of the market, while the United States ranks second, with 33 percent.

I. Statistical Tables

PS&D Tables:

PSD Table						
Country	France					
Commodity	Oilseed, Rapeseed				(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 Planted	1343	1343	1225	1225	1100	1098
Area Harvested	1343	1343	1225	1225	1100	1098
Beginning Stocks	110	110	85	83	191	121
Production	4454	4454	3569	3569	2900	2890
MY Imports	46	46	29	28	30	25
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	19	19	15	15	15	15
TOTAL SUPPLY	4610	4610	3683	3680	3121	3036
MY Exports	2767	2767	1817	1829	1675	1280
MY Exp. to the EC	1641	1641	1460	1506	1300	1130
Crush Dom. Consumption	1403	1403	1322	1288	1155	1280
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	355	357	353	442	236	387
TOTAL Dom. Consumption	1758	1760	1675	1730	1391	1667
Ending Stocks	85	83	191	121	55	89
TOTAL DISTRIBUTION	4610	4610	3683	3680	3121	3036
Calendar Year Imports	28	25	30	30	30	30
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	2231	2241	2200	1700	1700	1700
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs

PSD Table						
Country	France					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001
Area Planted	817	817	710	710	760	715
Area Harvested	817	817	710	710	760	715
Beginning Stocks	161	202	301	342	306	312
Production	1919	1919	1813	1813	1700	1753
MY Imports	127	127	175	178	110	55
MY Imp. from U.S.	13	13	15	10	15	5
MY Imp. from the EC	4	4	10	10	5	5
TOTAL SUPPLY	2207	2248	2289	2333	2116	2120
MY Exports	453	453	420	450	400	445
MY Exp. to the EC	441	441	400	425	380	440
Crush Dom. Consumption	1241	1241	1378	1378	1340	1350
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	212	212	185	193	170	164
TOTAL Dom. Consumption	1453	1453	1563	1571	1510	1514
Ending Stocks	301	342	306	312	206	161
TOTAL DISTRIBUTION	2207	2248	2289	2333	2116	2120
Calendar Year Imports	86	86	200	150	130	150
Calendar Yr Imp. U.S.	15	15	15	15	15	15
Calendar Year Exports	509	509	450	450	400	400
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs

PSD Table						
Country	France					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Area Planted	102	102	79	79	120	120
Area Harvested	102	102	79	79	120	120
Beginning Stocks	16	16	36	51	36	51
Production	267	267	208	207	320	314
MY Imports	467	467	810	850	850	850
MY Imp. from U.S.	265	265	280	270	250	270
MY Imp. from the EC	51	51	60	100	50	100
TOTAL SUPPLY	750	750	1054	1108	1206	1215
MY Exports	25	11	5	25	10	25
MY Exp. to the EC	25	11	5	25	10	25
Crush Dom. Consumption	330	329	625	650	780	730
Food Use Dom. Consump.	30	30	30	30	30	30
Feed,Seed,Waste Dm.Cn.	329	329	358	352	340	379
TOTAL Dom. Consumption	689	688	1013	1032	1150	1139
Ending Stocks	36	51	36	51	46	51
TOTAL DISTRIBUTION	750	750	1054	1108	1206	1215
Calendar Year Imports	441	439	800	530	850	530
Calendar Yr Imp. U.S.	194	194	200	270	250	270
Calendar Year Exports	20	8	5	6	10	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs

II. Production, Supply and Demand

Production

Rapeseed production estimates for MY 00/01 and 01/02 were unchanged at 3.57 million MT and 2.89 million MT, respectively. Sunflowerseed production was maintained at 1.81 million MT in MY 00/01 and slightly reestimated at 1.75 million MT for MY 01/02.

French soybean production estimates was unchanged at 207,000 MT in MY 00/01 and slightly revised down to 314,000 MT in MY 01/02. This represents a 52 percent increase from MY 00/01 to MY 01/02, due mainly to the increased production of non-biotech soybean branded "Soja de Pays" in France.

Consumption

The amount of rapeseed used for crush was revised down from last estimate to 1.29 million MT in MY 00/01. This resulted from limited French crushing capacity left after the sharp increase in the soybean crush in 00/01. In addition, an increasing quantity of rapeseed was used in MY 00/01 for animal feed, in order to partially replace banned meat and bone meal (MBM) in animal feed rations.

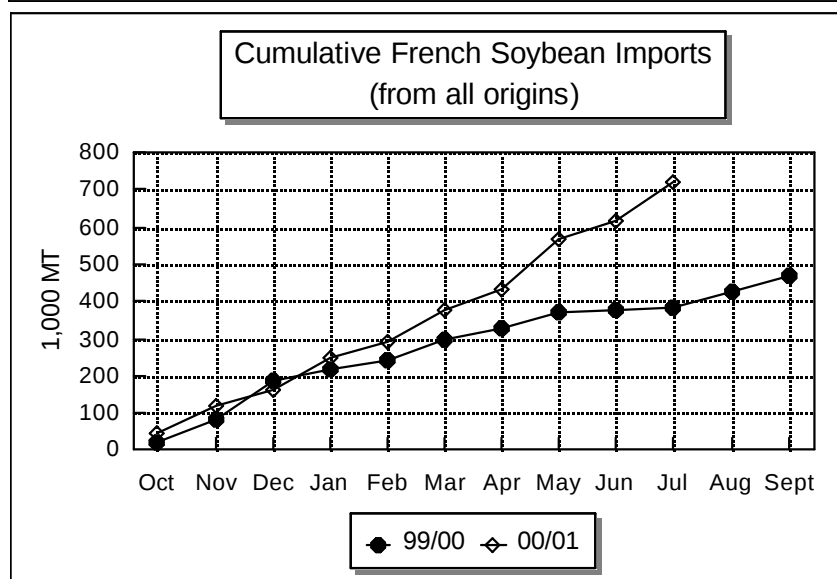
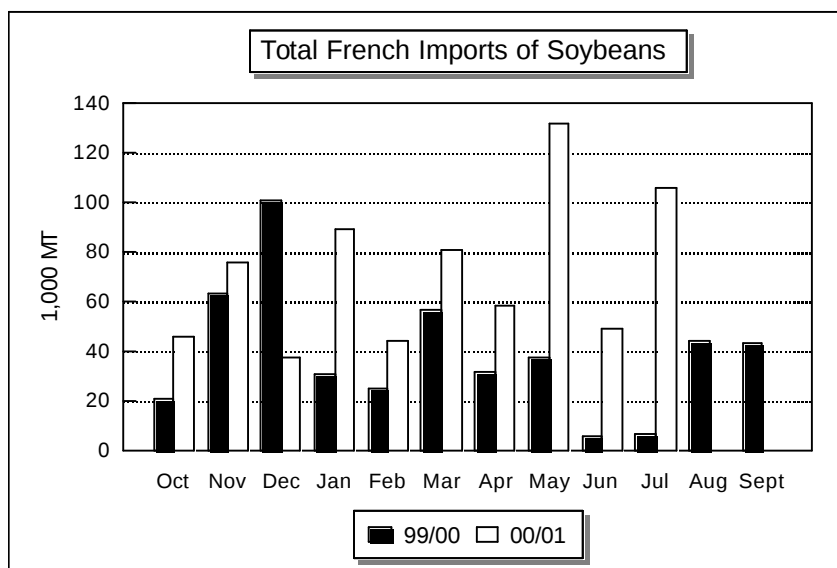
Sunflowerseed consumption for crush remained unchanged at 1.38 million MT in MY 00/01 and revised up slightly to 1.35 million MT for MY 01/02.

As a result of sharply increased imports, the quantities of soybeans used for crush are estimated to double from 329,000 MT in MY 99/00 to 650,000 MT in MY 00/01, revised slightly up from last estimates. In MY 01/02, soybeans crushed are expected to continue to increased to about 750,000 MT.

Trade

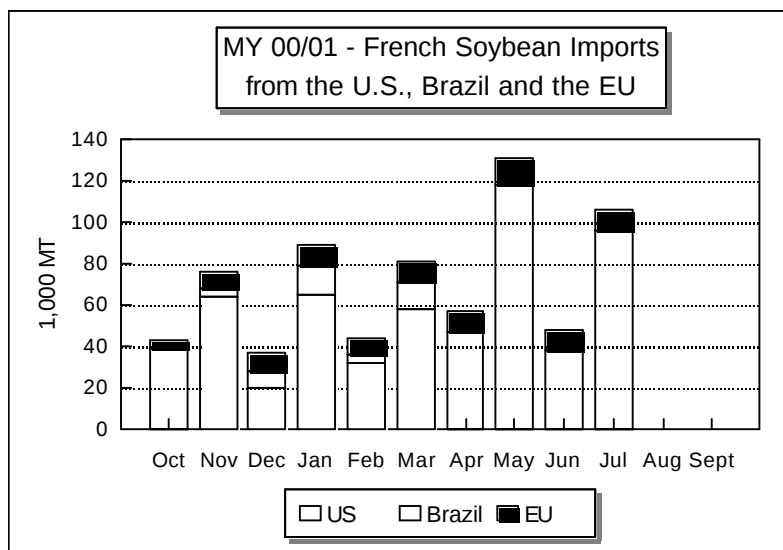
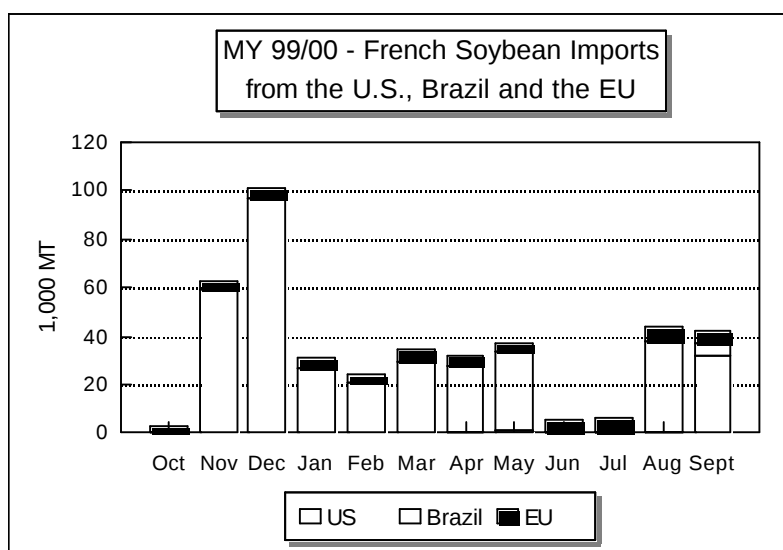
French imports of soybeans have increased sharply (by 89 percent) from the first 10 months in MY 1999/2000 to the same period in MY 2000/01. This was due to the increased domestic demand for vegetable proteins in animal feed to replace meat and bone meal (MBM) in swine and poultry rations, after MBM was banned in November 2000.

The graphs below compare monthly imports of soybeans and cumulative imports in MY 1999/2000 with imports in MY 2000/2001. They show that France has imported more soybeans each month of MY 00/01 than in MY 99/00, with the exception of December 2001. Significantly larger amounts of soybeans were shipped to France in January, May, June and July 2001 than in the same months of 2000. Data are not available for August and September 2001, to date.

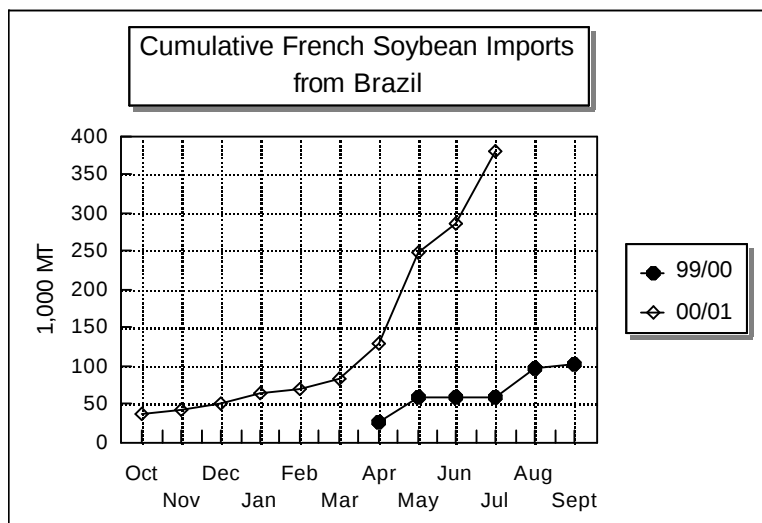


France's leading soybean suppliers are Brazil and the United States. Most of the soybean shipments are imported directly. However, some are imported through the major European ports of Rotterdam and Antwerp, considered by French Customs as intra-European trade.

The following graphs give a breakdown of French soybean imports in MY 99/00 and MY 00/01 by country of origin. They clearly indicate that most of the increase in total imports comes for higher shipments from Brazil, especially in May, June and July 2001.



As shown in the graph below, French imports of soybeans from Brazil sharply increased from the first 10 months in MY 99/00 to the same period in MY 00/01. They were more than six times higher in MY 00/01. As a result, Brazil has become France's leading soybean supplier for MY 2000/01, with 53 percent of the market (up from 6 percent in 99/00), while the United States had 33 percent of the market (down from 69 percent).



For their part, French imports of soybeans from the United States increased by 2 percent from the first ten months in MY 99/00 to the same period in MY 00/01. See graph below.

