



Cereals market situation

Committee for the Common Organisation of Agricultural
Markets

27 January 2022

2020/2021 marketing year

EU 27 2020/2021 Usable Production

(million tonnes)

	2019/20	2020/2021		
		Dec.Estimate	Jan.Estimate	vs. 2019/2020 (%)
Soft wheat	131.1	118.3	118.3	-9.8
Durum wheat	7.4	7.3	7.3	-0.7
Barley	55.0	54.0	54.0	-2.0
Maize	70.1	68.0	68.0	-3.1
Rye	8.3	8.7	8.7	5.4
Oats	6.9	8.4	8.4	22.0
Total	294.5	281.3	281.3	-4.5

Source: DG AGRI -G4

EU 2020/2021 Cereals Balance Sheet

(thousand metric tonnes)

LAST UPDATED: 27/01/2022

	2020/21 est.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	9 583	4 390	1 738	21 838	832	1 780	355	1 813	335	42 665
Usable production	118 339	53 957	7 342	67 966	8 714	1 069	8 379	12 090	3 445	281 301
Area (thousand ha)	20 765	11 025	2 112	9 355	2 064	217	2 563	2 752	1 168	52 021
Yield (tonnes/ha)	6	5	3	7	4	5	3	4	3	5
Imports (from third countries)	2 022	1 249	2 932	14 518	87	15	49		179	21 050
Total supply	129 944	59 597	12 012	104 321	9 633	2 864	8 783	13 904	3 959	345 016
Total domestic use	93 610	44 417	9 018	80 312	8 611	1 590	7 401	11 769	3 583	260 312
Human consumption	41 000	362	8 079	4 703	2 959	155	1 100	52	23	58 433
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 100	6 000	95	11 300	1 500		101	445	170	28 710
<i>of which bioethanol/biofuel</i>	<i>3 100</i>	<i>437</i>		<i>6 200</i>	<i>900</i>			<i>344</i>	<i>14</i>	<i>10 995</i>
Animal feed	38 200	35 600	400	63 500	3 800	1 400	5 800	10 700	3 100	162 500
Losses	710	324	44	408	52	6	50	73	21	1 688
Exports (to third countries)	27 400	10 647	828	3 672	174	18	140	7	22	42 909
Total use	121 010	55 063	9 846	83 984	8 786	1 608	7 541	11 776	3 606	303 221
Ending stocks**	8 934	4 534	2 166	20 337	847	1 256	1 242	2 128	353	41 795
Change in stocks**	-650	144	427	-1 501	15	-524	887	314	18	-870

* Marketing year: from July to June

** At the end of the marketing year

2021/2022 marketing year

EU27 2021/2022 Area

(million ha)

	2020/2021	2021/2022		
		Dec. Forecast	Jan. Forecast	vs. 2020/2021 (%)
Soft wheat	20.8	21.7	21.7	4.4
Durum wheat	2.1	2.2	2.2	4.4
Barley	11.0	10.3	10.3	-6.5
Maize	9.4	9.2	9.2	-1.4
Rye	2.1	1.9	1.9	-7.4
Oats	2.6	2.6	2.6	0.6
Total	52.0	52.1	52.0	0.0

Source: DG AGRI - G4

EU27 2021/2022 Production

(million tonnes)

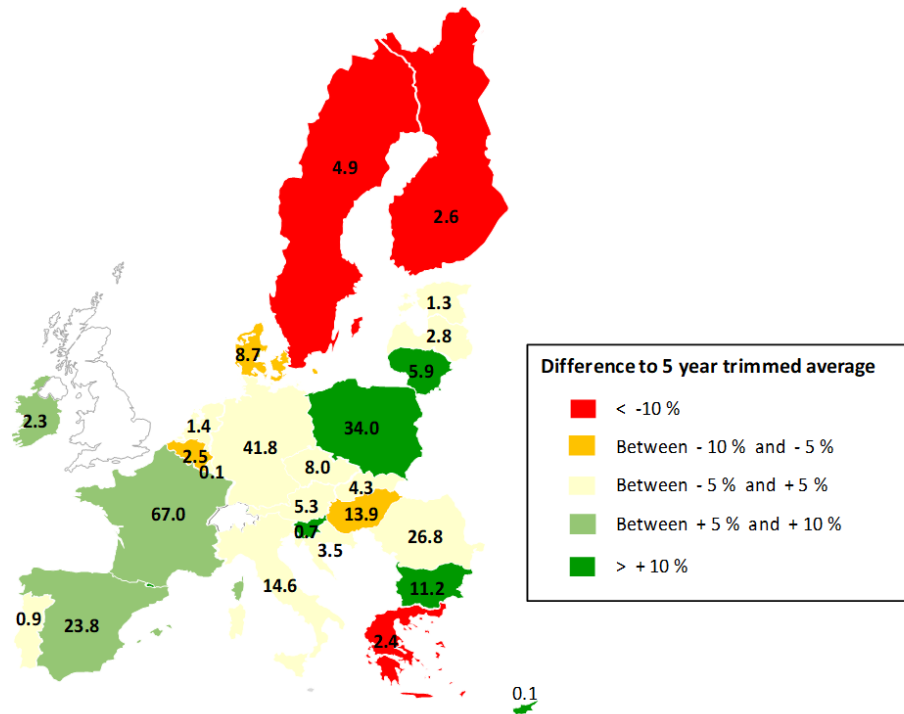
	2019/20	2020/2021	2021/2022		
			Dec. Forecast	Jan. Forecast	vs. 2020/2021 (%)
Soft wheat	131.1	118.3	130.6	130.5	10.3
Durum wheat	7.4	7.3	7.4	7.7	5.0
Barley	55.0	54.0	52.0	52.0	-3.6
Maize	70.1	68.0	69.4	69.0	1.5
Rye	8.3	8.7	7.8	7.8	-10.7
Oats	6.9	8.4	7.6	7.6	-9.8
Total	294.5	281.3	291.0	290.8	3.4

Source: DG AGRI -G4

Total cereals 2021/2022 – Production (m/m change)

January 2022

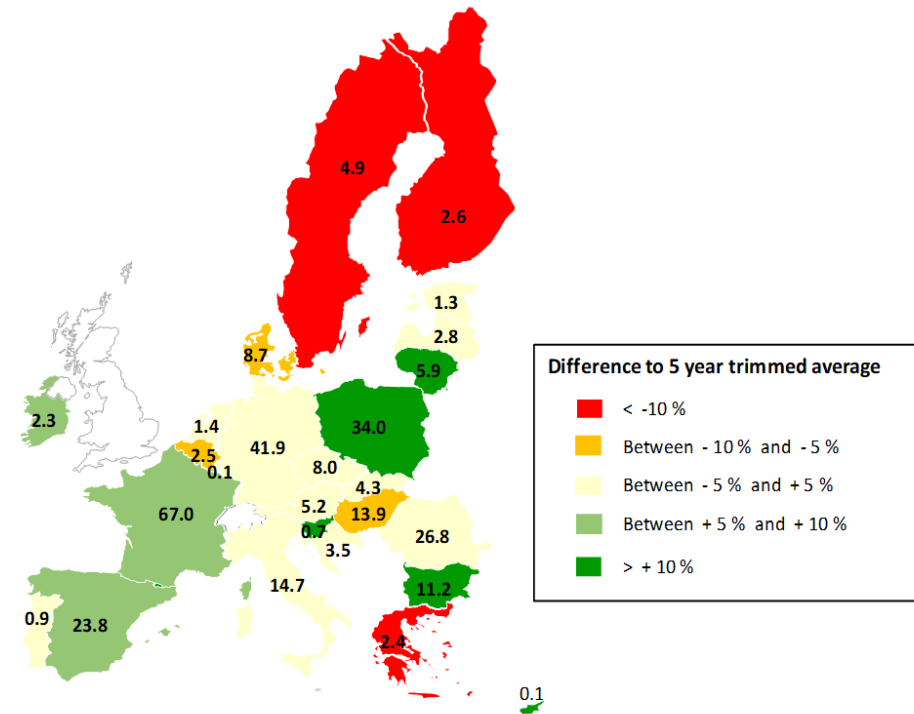
Total cereals production - 2021 projection (million tonnes)



EU production: 290.8 million tonnes - difference to 5 year trimmed average: +4%

December 2021

Total cereals production - 2021 projection (million tonnes)

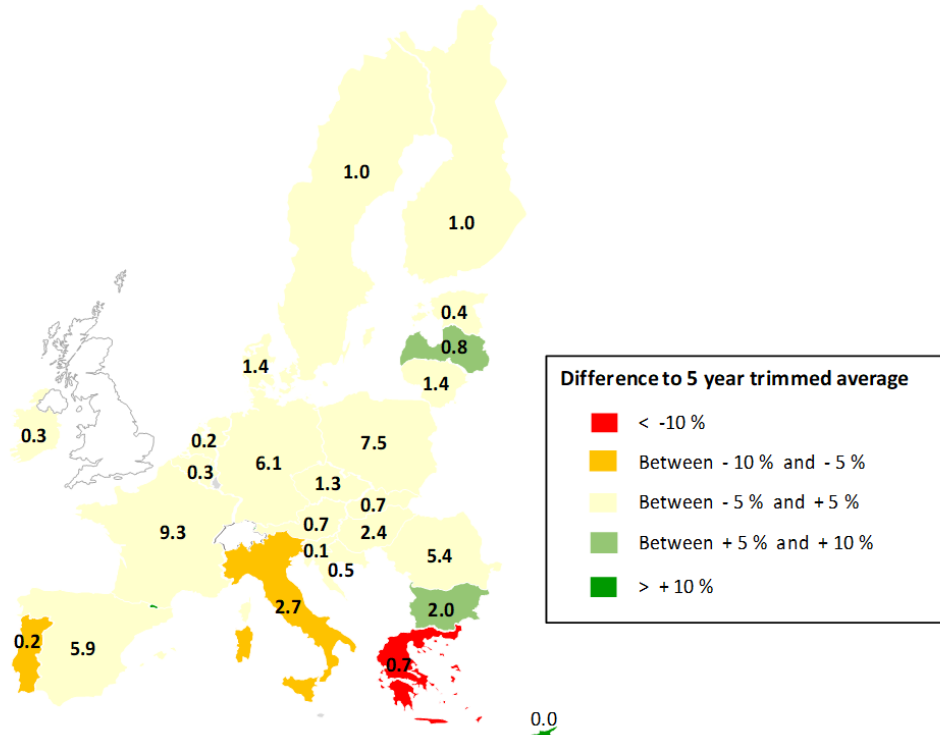


EU production: 291 million tonnes - difference to 5 year trimmed average: +4%

Total cereals 2021/2022 – Area (m/m change)

January 2022

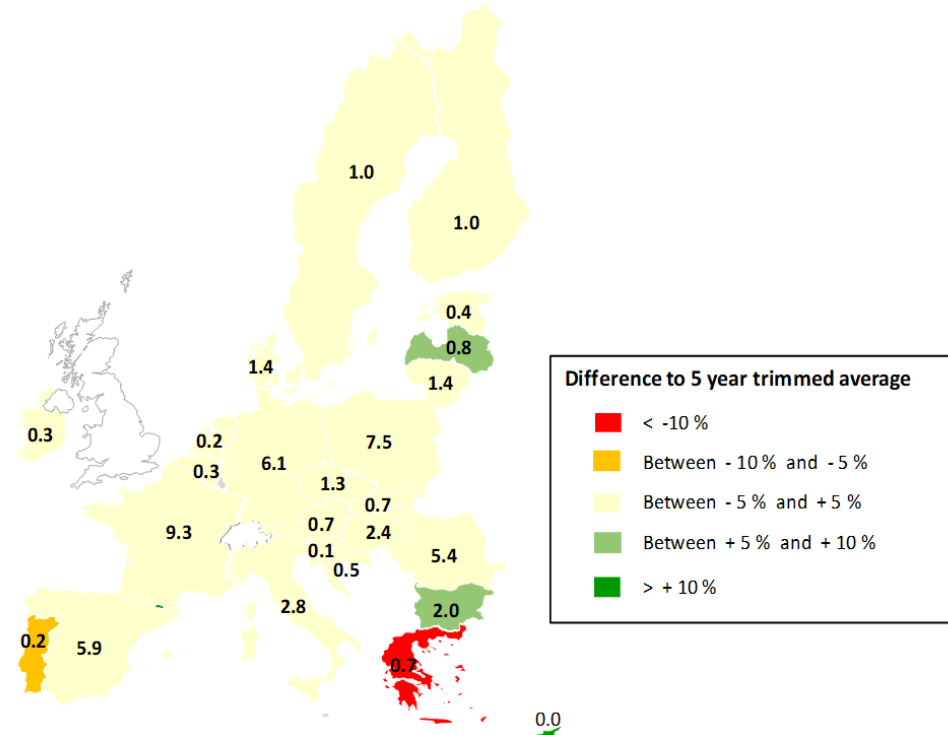
Total cereals area - 2021 projection (million hectares)



EU area: 52 million hectares - difference to 5 year trimmed average: -0.8%

December 2021

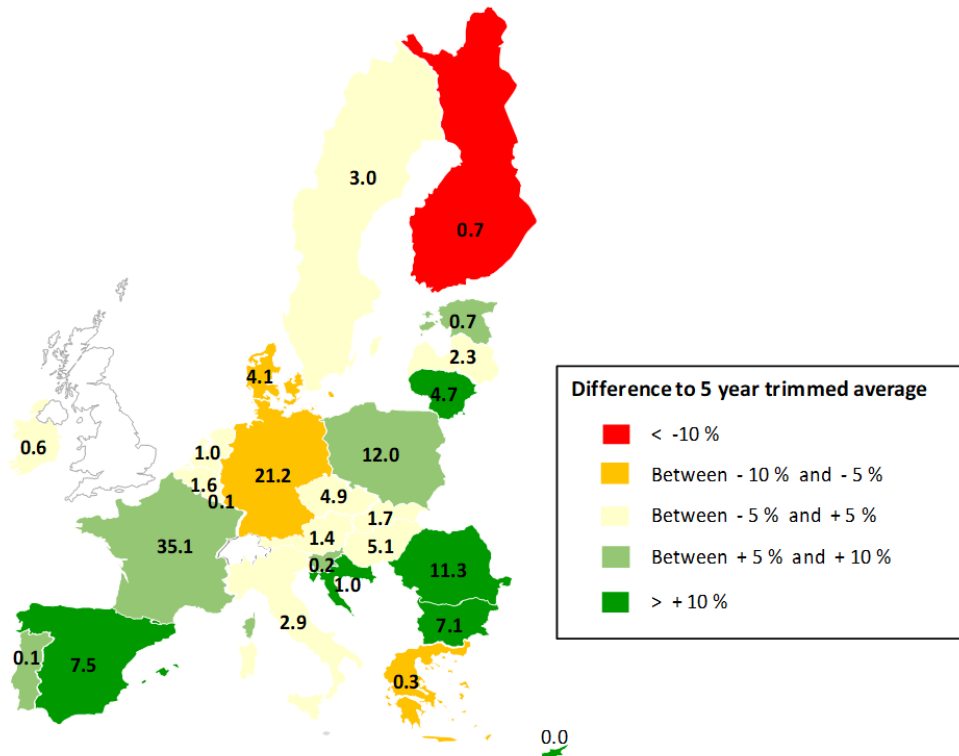
Total cereals area - 2021 projection (million hectares)



EU area: 52.1 million hectares - difference to 5 year trimmed average: -0.7%

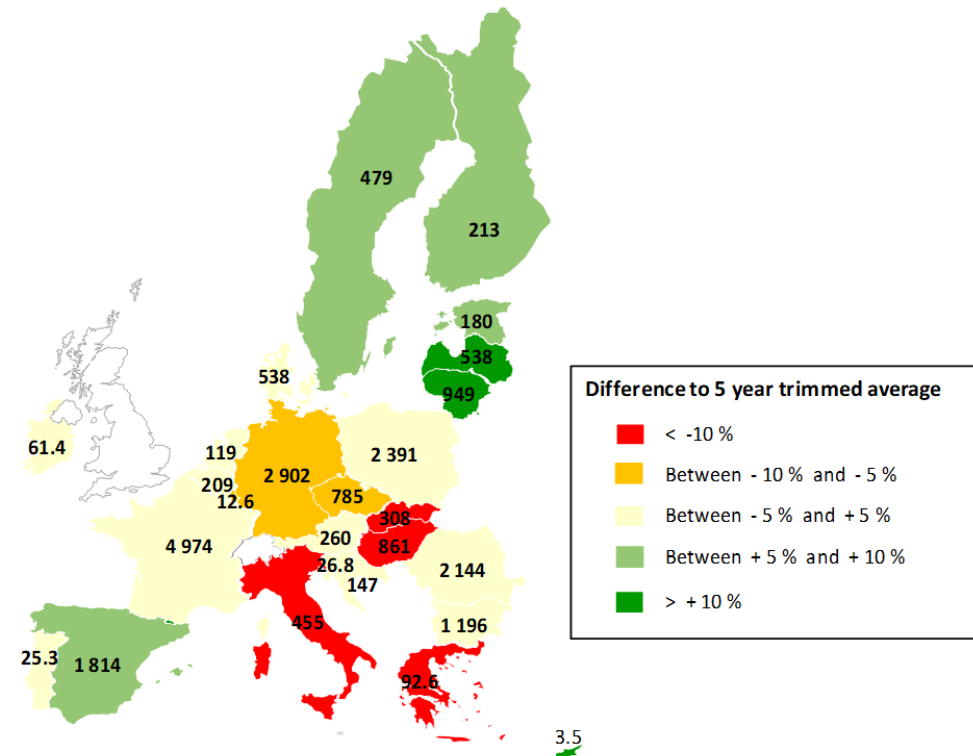
Soft wheat 2021

Soft wheat production - 2021 projection (million tonnes)



EU production: 130.5 million tonnes - difference to 5 year trimmed average: +7.2%

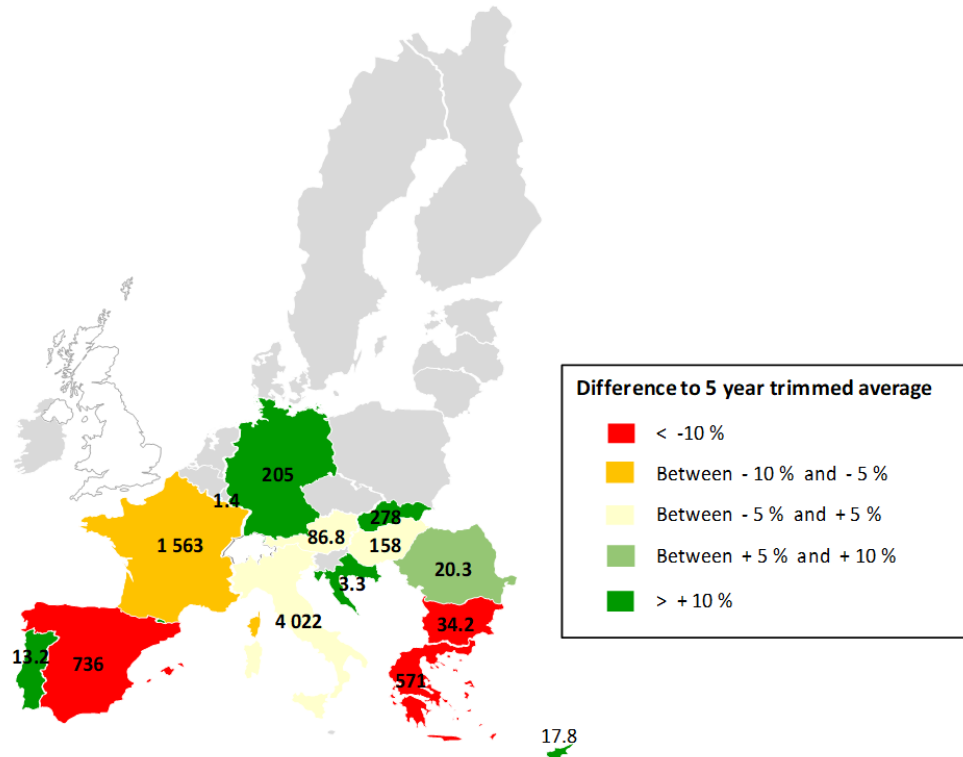
Soft wheat area - 2021 projection (thousand hectares)



EU area: 21 681 thousand hectares - difference to 5 year trimmed average: +0.2%

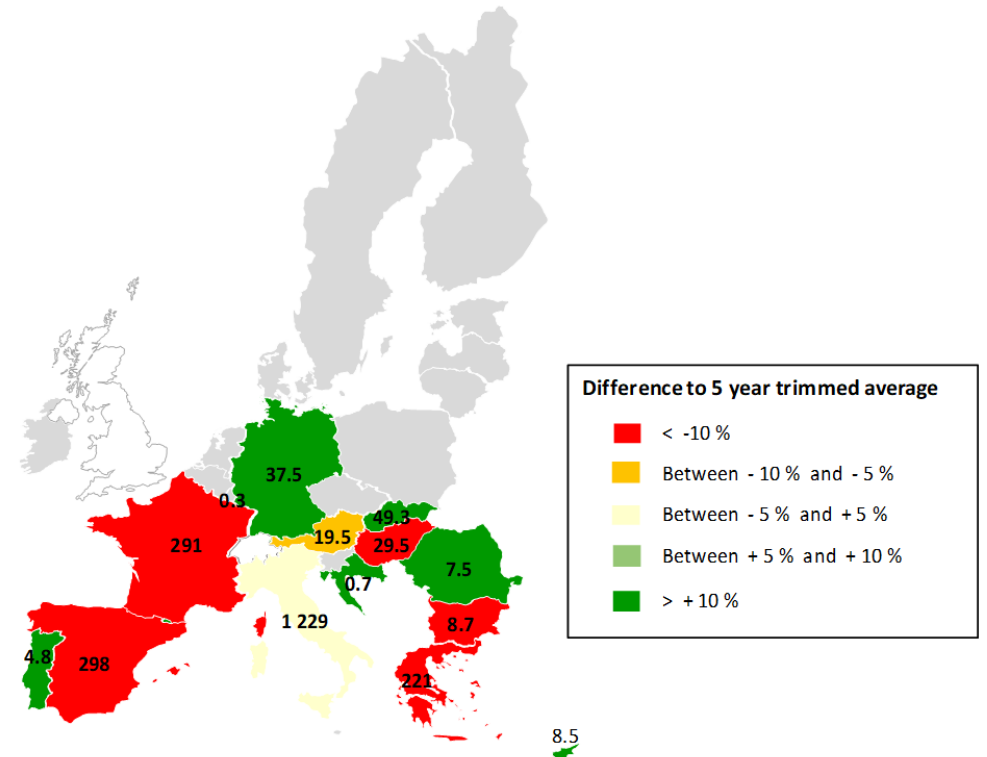
Durum wheat 2021

Durum wheat production - 2021 projection (thousand tonnes)



EU production: 7 711 thousand tonnes - difference to 5 year trimmed average: -6.7%

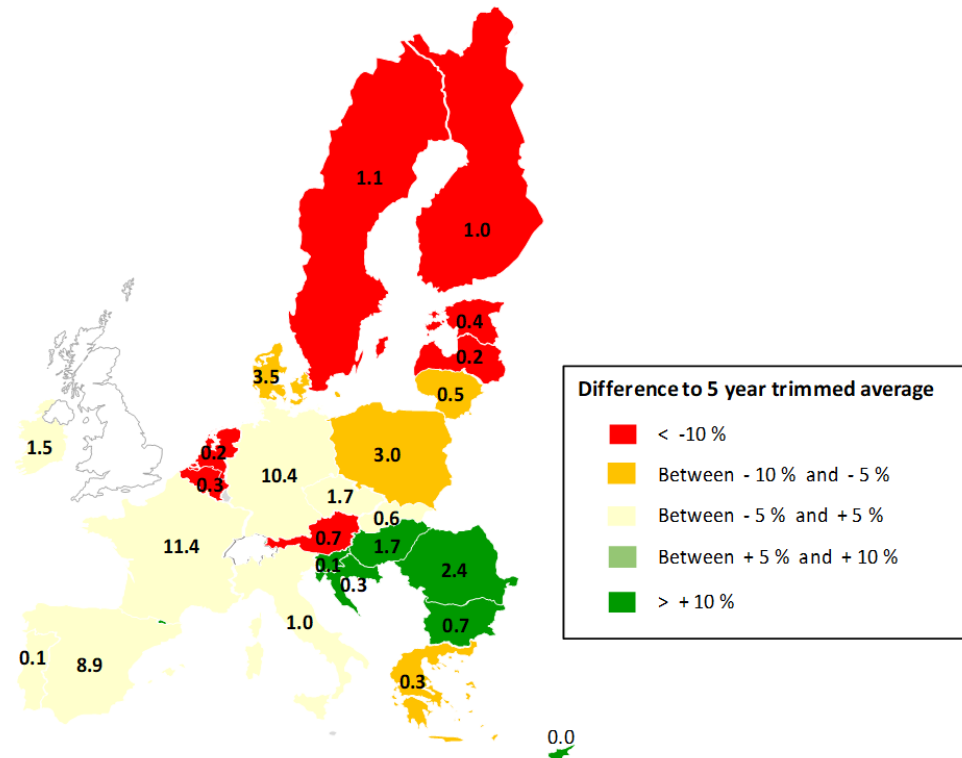
Durum wheat area - 2021 projection (thousand hectares)



EU area: 2 205 thousand hectares - difference to 5 year trimmed average: -7.7%

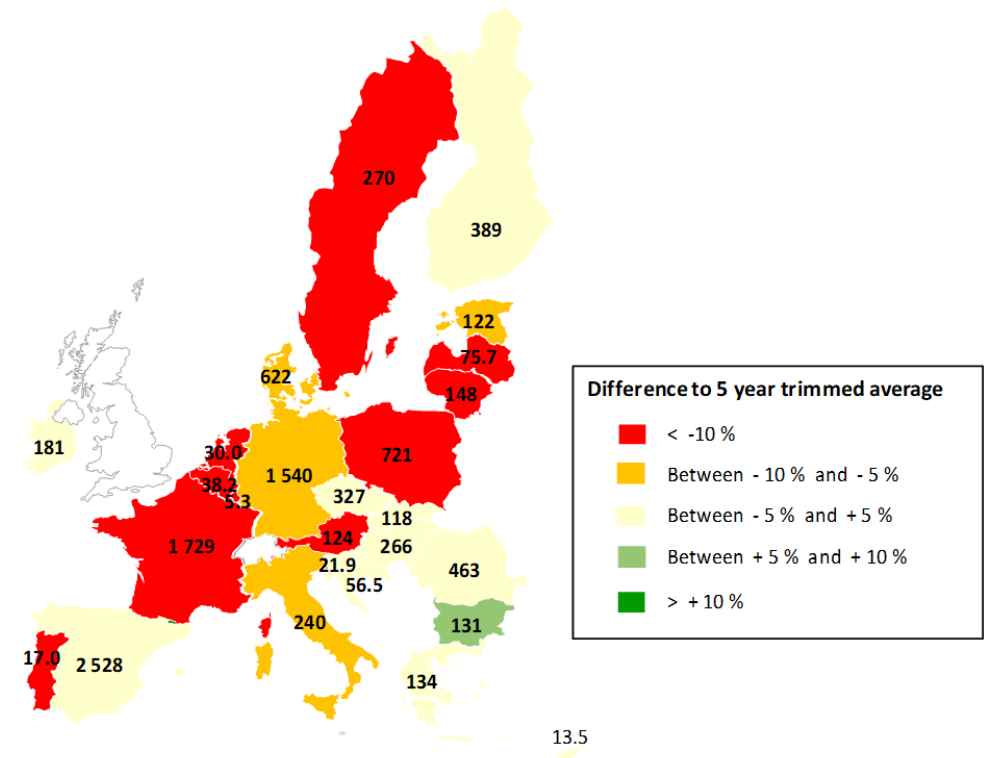
Barley 2021

Barley production - 2021 projection (million tonnes)



EU production: 52 million tonnes - difference to 5 year trimmed average: -1.2%

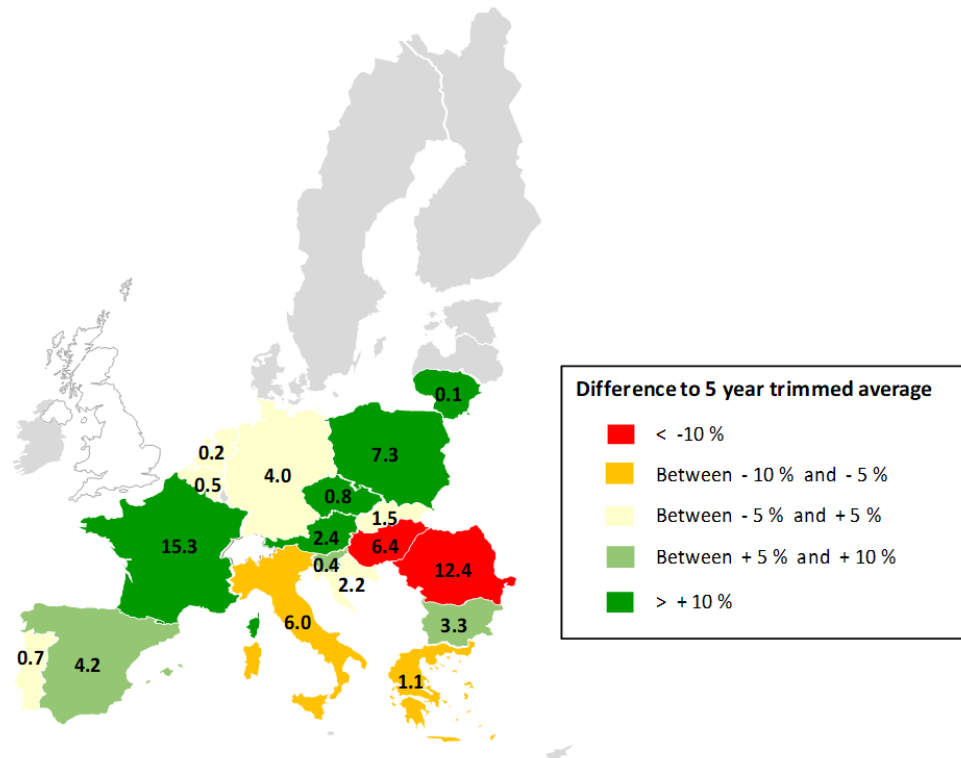
Barley area - 2021 projection (thousand hectares)



EU area: 10 309 thousand hectares - difference to 5 year trimmed average: -7.2%

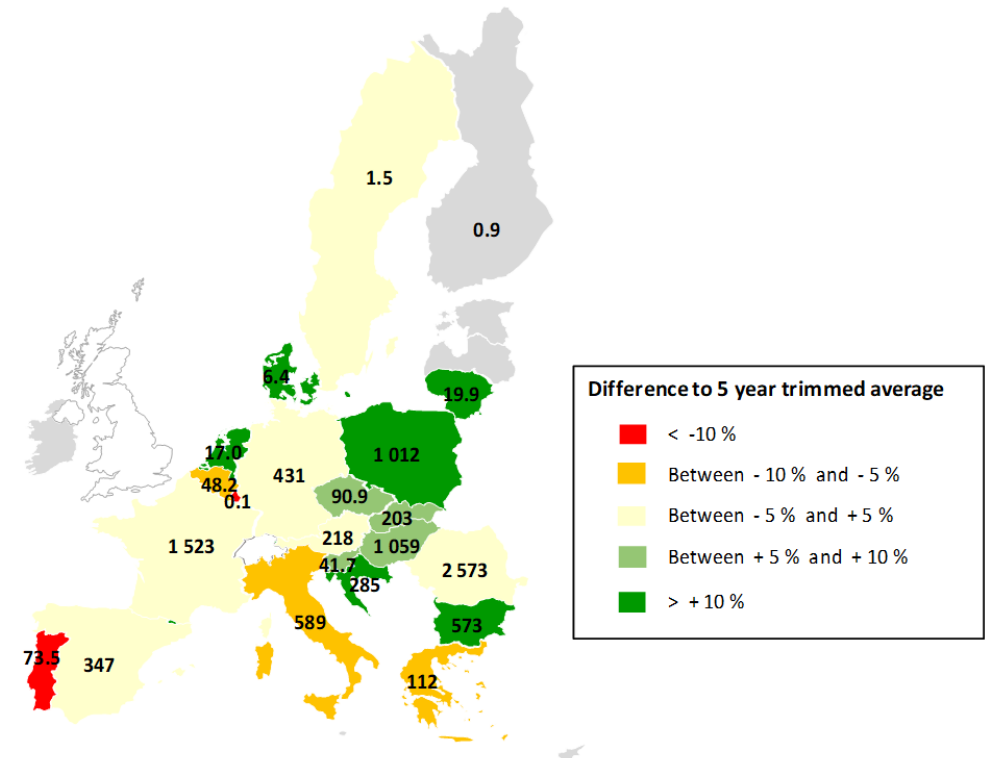
Maize 2021

Maize production - 2021 projection (million tonnes)



EU production: 69 million tonnes - difference to 5 year trimmed average: +2.6%

Maize area - 2021 projection (thousand hectares)



EU area: 9 223 thousand hectares - difference to 5 year trimmed average: +7.6%

EU 2021/2022 Usable Production: comparison with other forecasters

(million tonnes)

	EC DG AGRI 27-January	Stratégie Grains 13-January	COCERAL 13-December	COPA COGECA 15-December
Soft Wheat	130.5	129.8	128.9	126.2
Durum Wheat	7.7	7.6	7.7	7.7
Barley	52.0	51.8	52.2	49.0
Maize	69.0	68.4	66.2	71.1
Rye	7.8	7.9	8.1	8.3
Total Cereals	290.8	288.1	284.8	285.9

2021/2022

Evolution of production forecasts

Production forecast, most important producers*

	month/month variation	year/year variation	vs. 5-year average
<i>France</i>	0.0%	17.5%	7.5%
<i>Germany</i>	-0.4%	-2.5%	-4.9%
<i>Poland</i>	0.0%	-3.0%	13.6%
<i>Romania</i>	0.0%	39.6%	2.3%
<i>Spain</i>	0.1%	-6.4%	8.9%
<i>Hungary</i>	0.0%	-10.3%	-9.1%
<i>Italy</i>	-0.4%	-3.0%	-1.0%

*: 76% of the EU production

Source: DG AGRI -G4

2021/2022 – Member States details

		EU	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	NL	AT	PL	PT	RO	SI	SK	FI	SE
Soft wheat	Area	21 681	209	1 196	785	538	2 902	180	61	93	1 814	4 974	147	455	4	538	949	13	861	119	260	2 391	25	2 144	27	308	213	479
	Yield	6.07	7.80	5.96	6.30	7.62	7.38	4.05	9.81	3.03	4.17	7.12	6.63	6.33	1.94	4.24	4.95	5.92	5.99	8.61	5.57	5.07	2.65	5.33	5.76	5.70	3.21	6.31
	Production	131 556	1 630	7 125	4 942	4 098	21 411	729	602	281	7 560	35 409	973	2 877	7	2 284	4 696	74	5 156	1 024	1 451	12 122	67	11 422	154	1 755	683	3 025
Durum wheat	Area	2 205	0	9	0	0	38	0	0	221	298	291	1	1 229	9	0	0	0	30	0	19	0	5	7	0	49	0	0
	Yield	3.53		3.97			5.52			2.61	2.49	5.43	4.71	3.31	2.12			4.86	5.42		4.51		2.81	2.75		5.70		
	Production	7 793	0	35	0	0	207	0	0	577	744	1 580	3	4 065	18	0	0	1	160	0	88	0	13	21	0	281	0	0
Barley	Area	10 309	38	131	327	622	1 540	122	181	134	2 528	1 729	57	240	14	76	148	5	266	30	124	721	17	463	22	118	389	270
	Yield	5.09	7.53	5.35	5.38	5.65	6.79	3.18	8.39	2.47	3.55	6.63	5.42	4.32	1.85	2.49	3.68	5.72	6.39	7.07	5.97	4.18	3.35	5.25	5.44	5.12	2.63	3.92
	Production	52 470	288	699	1 759	3 509	10 458	386	1 520	332	8 968	11 465	306	1 038	25	189	545	30	1 699	212	738	3 015	57	2 427	119	602	1 023	1 061
Grain maize	Area	9 223	48	573	91	6	431	0	0	112	347	1 523	285	589	0	0	20	0	1 059	17	218	1 012	73	2 573	42	203	1	2
	Yield	7.51	10.70	5.76	8.47	6.63	9.35			10.05	12.29	10.11	7.60	10.30			6.00	7.43	6.08	9.47	11.16	7.23	9.75	4.86	9.10	7.51	0.00	8.64
	Production	69 261	516	3 300	770	42	4 029	0	0	1 126	4 264	15 393	2 166	6 060	0	0	119	1	6 438	161	2 435	7 318	716	12 492	379	1 524	0	13
Rye	Area	1 912	1	9	25	108	621	12	0	8	118	43	1	3	0	34	26	1	26	2	33	762	14	10	1	11	18	25
	Yield	4.16	4.13	2.42	5.02	6.34	5.30	3.52		1.91	2.56	4.42	4.20	3.22		3.98	2.80	4.57	3.18	4.00	4.61	3.30	1.14	3.45	3.95	3.30	3.54	5.66
	Production	7 956	3	21	126	687	3 292	42	0	16	301	189	2	11	0	137	73	7	82	8	152	2 510	15	35	3	36	64	143
Oats	Area	2 579	4	12	58	68	177	40	28	66	507	107	17	105	0	90	96	2	21	1	24	527	35	93	1	17	316	167
	Yield	2.96	4.42	2.25	3.57	4.97	4.36	2.00	8.49	1.12	2.36	4.54	3.44	2.26	1.10	2.04	2.50	4.50	3.15	7.00	3.65	3.15	1.26	2.54	3.43	2.45	2.48	3.31
	Production	7 645	16	27	206	339	773	80	236	74	1 198	486	59	237	0	183	239	7	66	7	89	1 660	44	237	4	41	783	552
Sorghum	Area	184	0	4	0	0	0	0	0	2	5	87	0	45	0	0	0	0	24	0	4	0	0	9	0	3	0	0
	Yield	5.82		3.25						3.36	3.77	6.04		6.71					4.76		8.41			4.69	5.06	2.92		
	Production	1 073	0	13	0	0	0	0	0	8	19	525	0	305	0	0	0	0	114	0	37	0	0	43	1	9	0	0
Triticale	Area	2 666	5	18	41	7	328	7	0	14	267	336	9	14	1	7	77	5	63	1	50	1 282	14	73	5	9	4	30
	Yield	4.43	5.14	3.83	4.85	7.29	5.86	4.25		2.44	2.94	5.13	4.52	4.56	1.60	3.96	3.19	5.41	4.36	7.00	5.29	4.25	1.54	4.66	5.12	3.49	2.00	5.14
	Production	11 814	26	68	198	50	1 922	31	0	35	784	1 723	43	64	1	29	246	25	275	7	264	5 442	21	340	26	32	7	153
Other cereals	Area	1 250	5	3	8	11	25	6	0	1	54	190	1	29	0	26	57	0	6	1	14	769	1	3	4	3	20	11
	Yield	3.02	4.69	1.89	1.86	3.26	3.17	0.73		2.10	2.96	3.93	2.00	3.06		1.16	1.16	4.25	2.09	0.00	3.26	3.09	1.36	1.95	0.91	1.26	1.82	2.73
	Production	3 777	24	6	15	35	79	5	0	3	158	747	2	90	0	31	67	1	13	0	46	2 375	2	6	4	4	37	29
Total cereals	Area	52 010	310	1 954	1 334	1 360	6 061	367	270	652	5 937	9 280	517	2 709	26	772	1 373	26	2 355	171	747	7 463	184	5 375	101	720	960	983
	Yield	5.64	8.07	5.78	6.01	6.44	6.96	3.47	8.72	3.76	4.04	7.28	6.87	5.44	1.94	3.69	4.36	5.60	5.95	8.30	7.09	4.62	5.09	5.03	6.80	5.95	2.71	5.06
	Production	293 344	2 501	11 294	8 017	8 760	42 171	1 273	2 358	2 451	23 996	67 517	3 554	14 748	51	2 851	5 985	147	14 003	1 419	5 300	34 444	935	27 023	690	4 283	2 598	4 976

EU 2021/2022 Cereals Balance Sheet

(thousand metric tonnes)

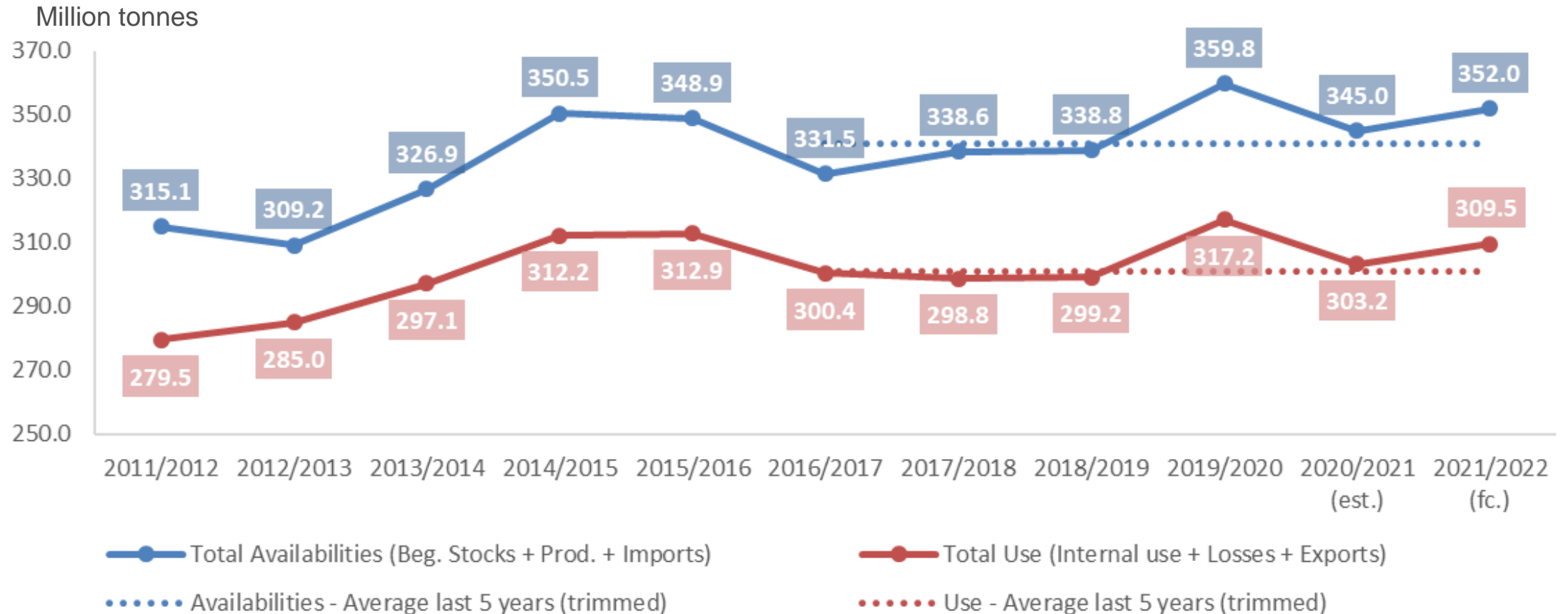
LAST UPDATED: 27/01/2022

	2021/22 fc									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	8 934	4 534	2 166	20 337	847	1 256	1 242	2 128	353	41 795
Usable production	130 530	52 024	7 711	68 970	7 781	1 019	7 561	11 578	3 599	290 773
Area (thousand ha)	21 681	10 309	2 205	9 223	1 912	184	2 579	2 666	1 250	52 010
Yield (tonnes/ha)	6	5	3	7	4	6	3	4	3	6
Imports (from third countries)	↑ 2 000	↓ 1 000	1 500	14 500	↑ 200	↓ 20	47	1	161	19 429
Total supply	141 463	57 558	11 376	103 807	8 828	2 295	8 850	13 706	4 113	351 996
Total domestic use	96 137	43 905	9 131	81 525	7 410	1 090	7 298	11 566	3 784	261 845
Human consumption	41 153	363	8 090	4 709	2 963	155	1 101	52	23	58 609
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 400	6 700	95	11 900	1 500		101	445	170	30 310
<i>of which bioethanol/biofuel</i>	3 400	437		6 800	900			344	14	11 895
Animal feed	40 200	34 400	500	64 100	2 600	900	5 700	10 500	3 300	162 200
Losses	783	312	46	414	47	6	45	69	22	1 745
Exports (to third countries)	32 000	9 500	800	↑ 5 000	↑ 200	↓ 10	↓ 130	4	19	47 663
Total use	128 137	53 405	9 931	86 525	7 610	1 100	7 428	11 570	3 803	309 509
Ending stocks**	13 327	4 153	1 446	17 283	1 218	1 195	1 422	2 135	310	42 488
Change in stocks**	4 393	-381	-720	-3 054	371	-61	180	8	-43	692

* Marketing year: from July to June

** At the end of the marketing year

Estimated EU availabilities and uses



EU Cereals Balance Sheet 2021/2022 (Summary)

- Production forecast above five-year trimmed average at 290.8 million tonnes (+3.4% y/y)
 - Compared to previous month, total production forecast slightly revised down (-0.2 million tonnes)
 - Compared to previous month, durum wheat expected production revised up (+0.3 million tonnes to 7.7 million tonnes)
- Trade:
 - Based on COMEXT data for July to November 2021, TAXUD data and specialized press information, revision of trade figures including:
 - Soft wheat imports revised up 0.5 million tonnes to 2 million tonnes
 - Maize exports revised up 1.3 million tonnes to 5 million tonnes

2022/2023 marketing year

Winter cereals

- Crops condition
 - Overall good crop condition in EU. Weather conditions were generally favourable for winter cereals establishment. Mild conditions in the regions experiencing late emergence benefited the crops
 - Weak hardening in the black sea region
- Area sown
 - *Stratégie Grains*: expected soft wheat area slightly smaller than current marketing year while barley sown area is estimated slightly larger
 - Refinitiv: compared to current marketing year, estimated soft wheat and durum wheat sown area slightly larger (+0.5% and +2.3% respectively)

Winter cereals

- Area sown (cont'd)

	France		Germany		Finland		Poland		Romania		Sweden	
	Area	Y/Y(%)	Area	Y/Y(%)	Area	Y/Y(%)	Area	Y/Y(%)	Area	Y/Y(%)	Area	Y/Y(%)
soft wheat	4 924	-1%	2 880	0%	106	91%	2 100	-3%	2 059	-3%	422	-8%
durum wheat	279	-2%										
barley	1 226	2%	1 237	0%			300	2%	301	-25%	23	-2%
oats	58	-4%										
rye	40	-7%	593	-6%	27	23%	800	5%	10	-4%	21	-22%
triticale	322	-4%	324	-1%			1 200	-6%	65	-11%	27	-3%

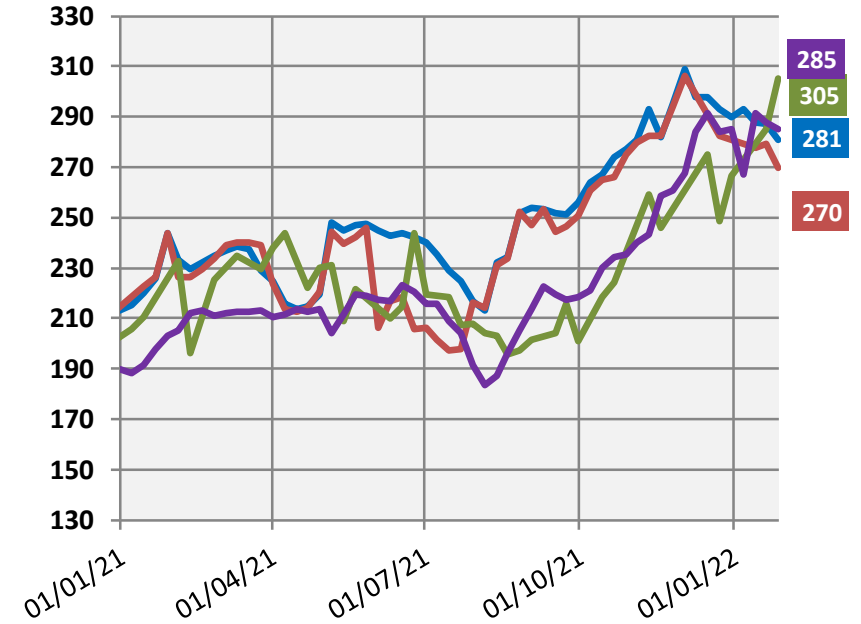
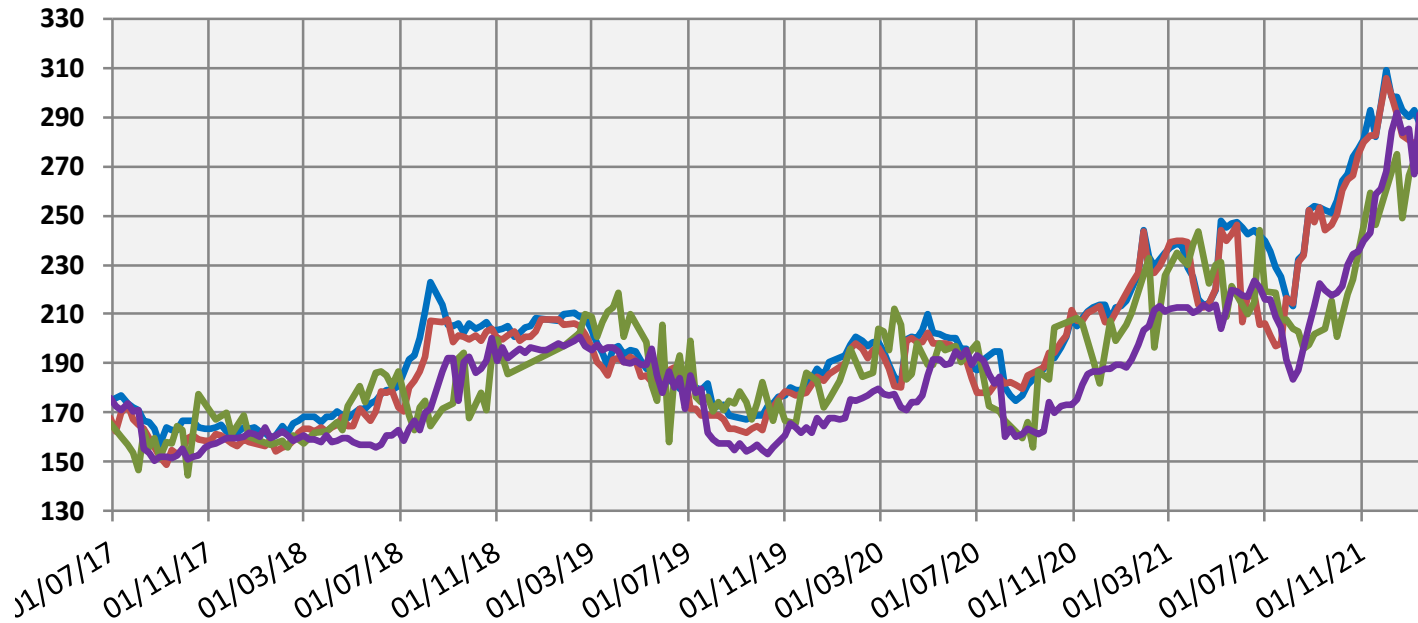
area unit: 1 000 ha

sources: FranceAgrimer, Destatis, Luke, MS communications, Eurostat

- Any updates from the MS on area sown for winter crops?

EU cereals market figures

EU market prices for milling wheat – (EUR per tonne)



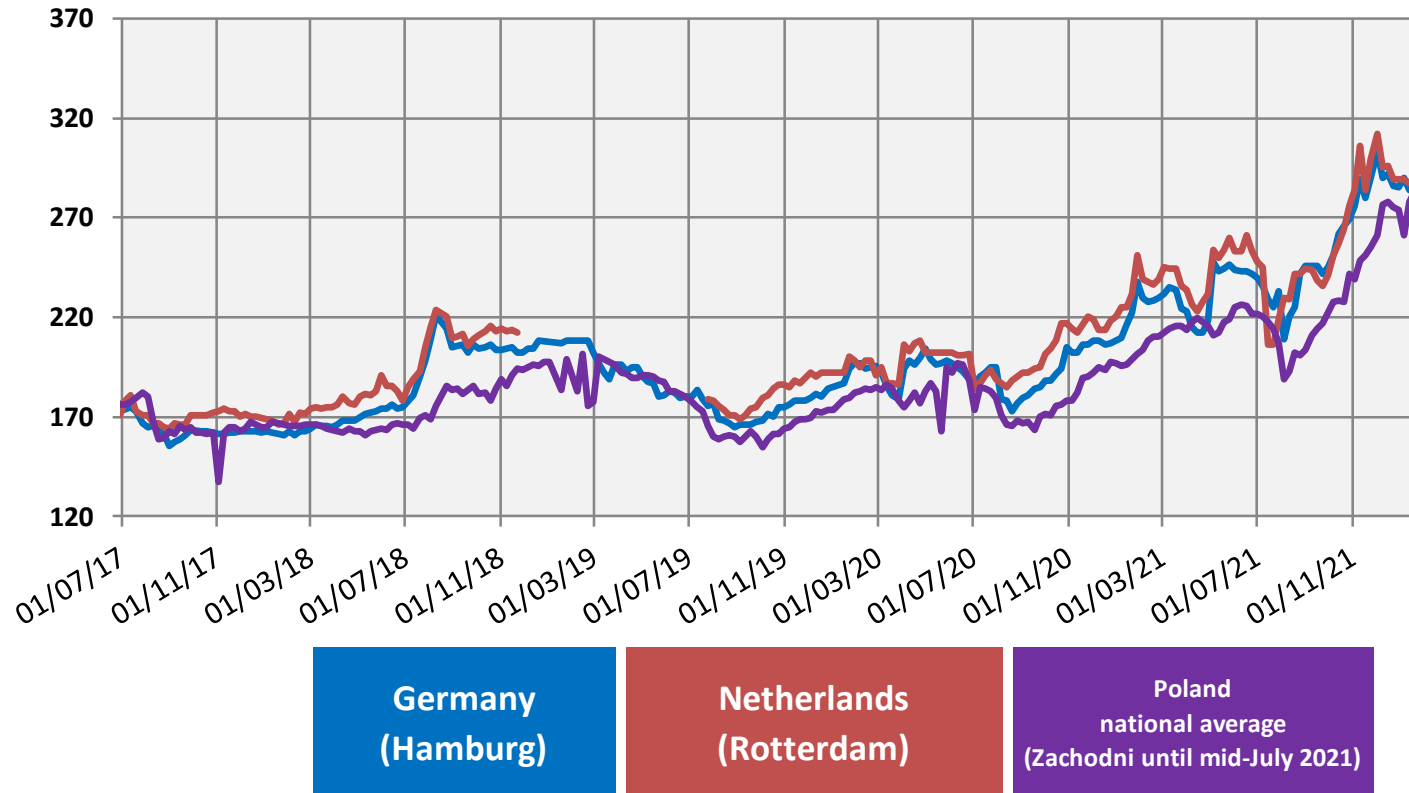
Germany (Hamburg)	France (Rouen)	Romania (Constanta)	Poland national average (Zachodni until mid-July 2021)
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Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

France
(DELPOR Rouen)

- EUR 270 per tonne; -4.5% month-on-month; +10.8% year-on-year

EU market prices for feed wheat – (EUR per tonne)

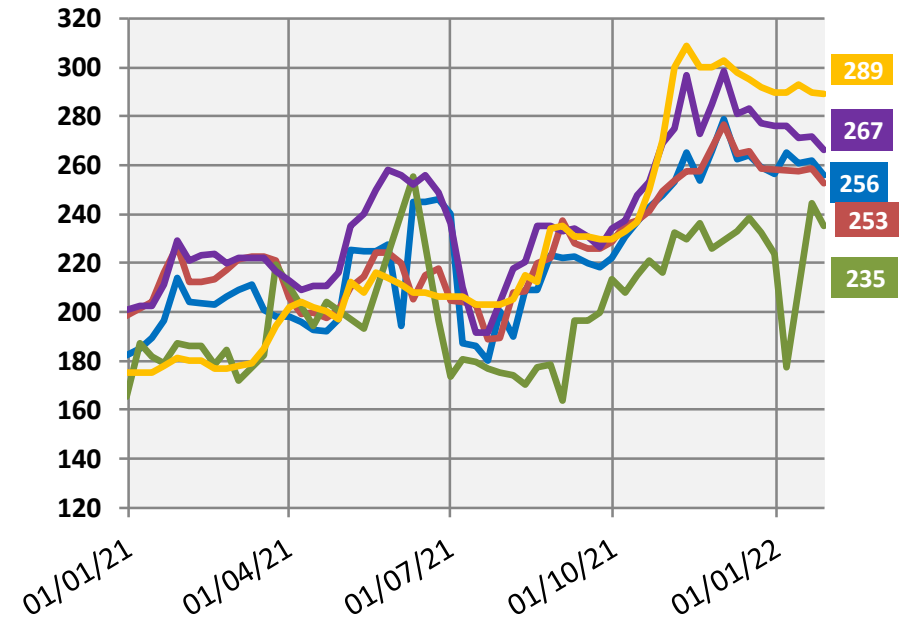
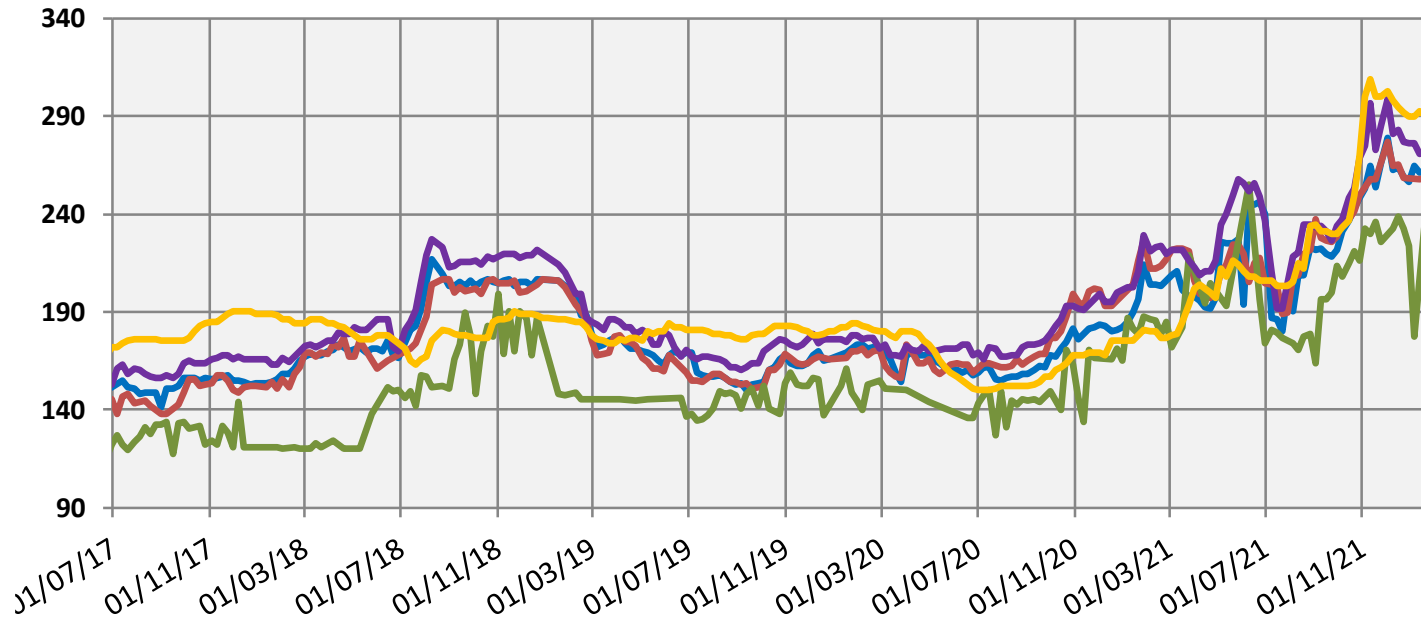


Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

Germany (DEPSILO Hamburg)

• EUR 278 per tonne; -2.8% month-on-month; +16.6% year-on-year

EU market prices for feed barley – (EUR per tonne)

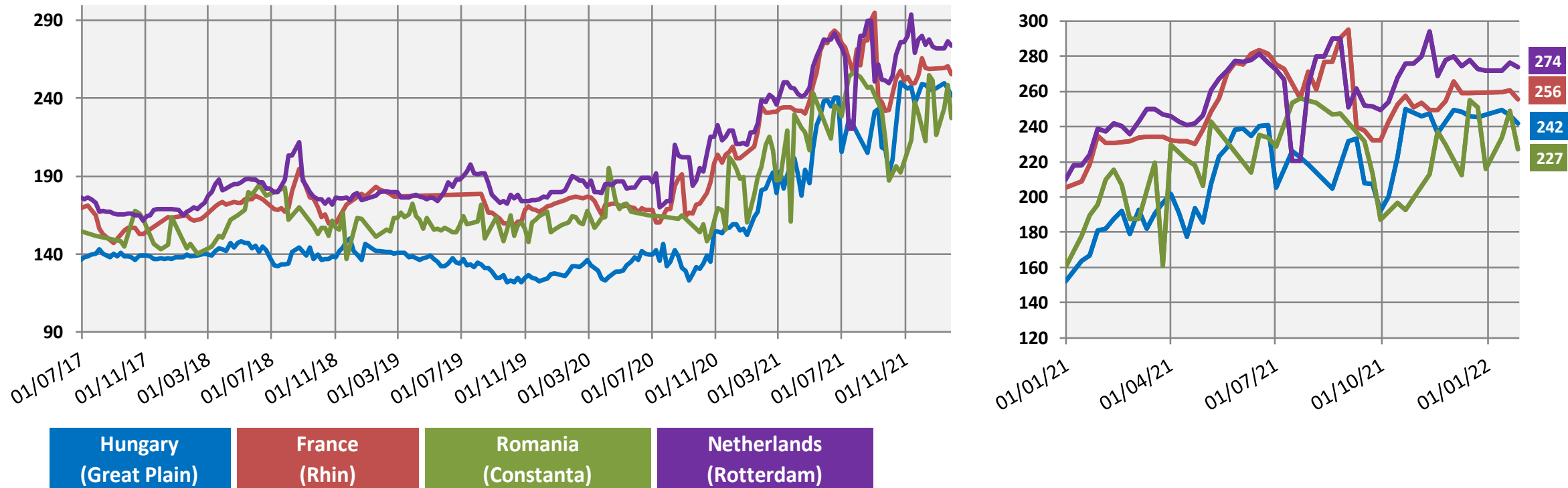


Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

**Germany
(DEPSILO Hamburg)**

- EUR 256 per tonne; -0.2% month-on-month; +19.6% year-on-year

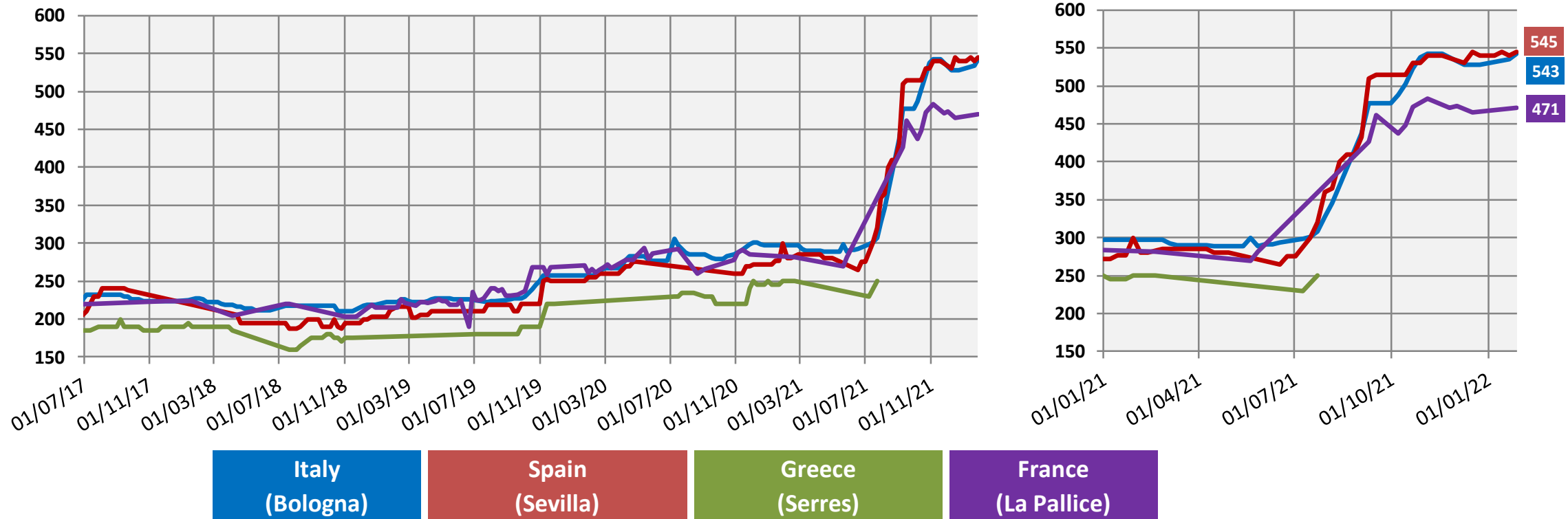
EU market prices for maize – (EUR per tonne)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

Hungary (FGATE Great Plain) • EUR 242 per tonne; -1.4% month-on-month; +33.6% year-on-year

EU market prices for durum wheat – (EUR per tonne)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

Italy (DELFIRST Bologna)

- EUR 543 per tonne; +2.8% month-on-month; +82.7% year-on-year

Last month evolution of EU cereal prices

- Milling and feed wheat prices almost stable m/m with slight positive or negative variations depending on the location except Romania – Constanta (milling wheat)
- Feed barley prices mostly stable m/m or with slight drops except in RO – Muntenia (+5.2% m/m)
- Maize prices seemed less volatile as well (except Romania - Constanta).
- Durum wheat prices have risen slightly and are still almost twice as high as a year ago (IT Bologna +82.7% y/y; ES Sevilla +81.7% y/y)

Thank you

The United Kingdom is no longer a Member State of the European Union, however where it is deemed relevant (e.g. for comparison purposes) an EU+UK aggregate are still displayed



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