



EU as importer of Black Sea Grains and as competitor in third countries

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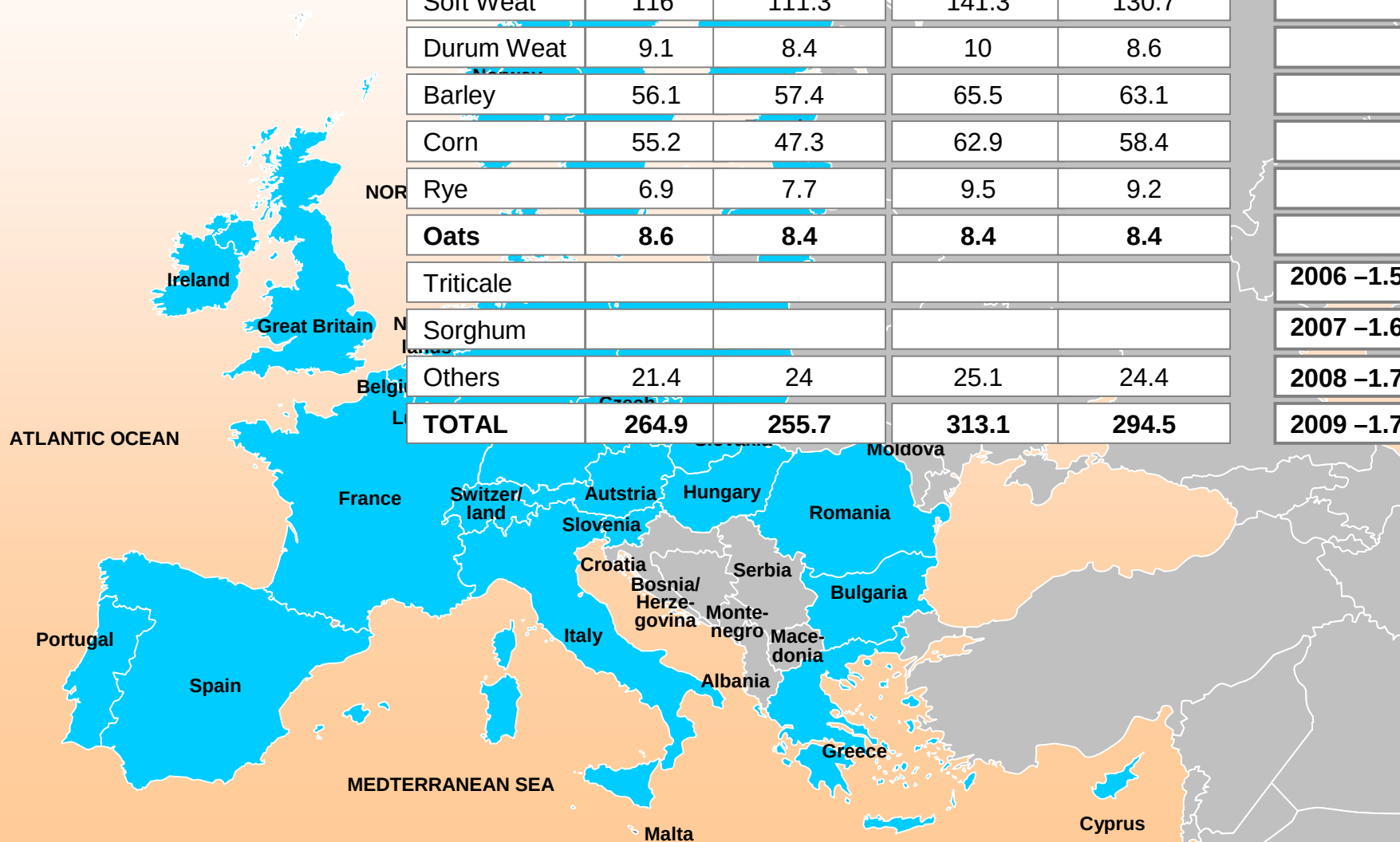
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1.1. EU 27 Figures

Historic production(MMt.)



Goods	2006/07	2007/08	2008/09	2009/2010	WORLD
Soft Weat	116	111.3	141.3	130.7	
Durum Weat	9.1	8.4	10	8.6	
Barley	56.1	57.4	65.5	63.1	
Corn	55.2	47.3	62.9	58.4	
Rye	6.9	7.7	9.5	9.2	
Oats	8.6	8.4	8.4	8.4	
Triticale					2006 -1.585
Sorghum					2007 -1.687
Others	21.4	24	25.1	24.4	2008 -1.784
TOTAL	264.9	255.7	313.1	294.5	2009 -1.727



1.2. EU 27 Figures

Coceral Forecast (MMt.)



	2008			2009			
	AREA MHas	YIELD Mt/Ha	PRODUCTION MMt	AREA MHas	YIELD Mt/Ha	PRODUCTION MMt	
SOFT WHEAT	23,377	6	140,956	22,801	5,6	128,299	-8,98%
DURUM WHEAT	3,159	3	9,582	3,027	2,8	8,57	-10,56%
BARLEY	14,616	4,5	65,795	14,091	4,3	61,271	-6,88%
CORN	8,87	6,9	60,839	8,655	6,5	56,373	-7,34%
RYE	2,751	3,3	9,202	2,72	3,2	8,213	-10,75%
OATS	2,952	3	8,71	2,93	2,8	8,213	-5,71%
SORGHUM	1,672	2,8	4,633	1,585	2,7	4,263	-7,99%
TRITICALE	2,639	4,1	10,885	2,669	4	10,627	-2,37%
TOTAL GRAINS	60,036	5,17	310,599	58,478	4,9	286,435	
				-2,60%	-5,22%	-7,78%	

TOTAL GRAINS EU Comission Forecast (MMt.)

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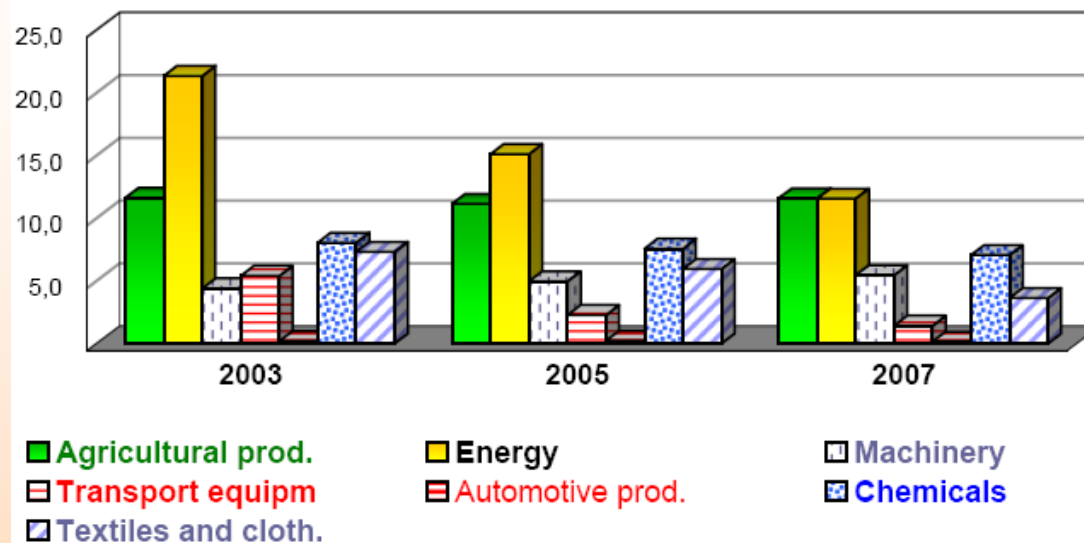
WHEAT EU Comission Forecast (MMt.)

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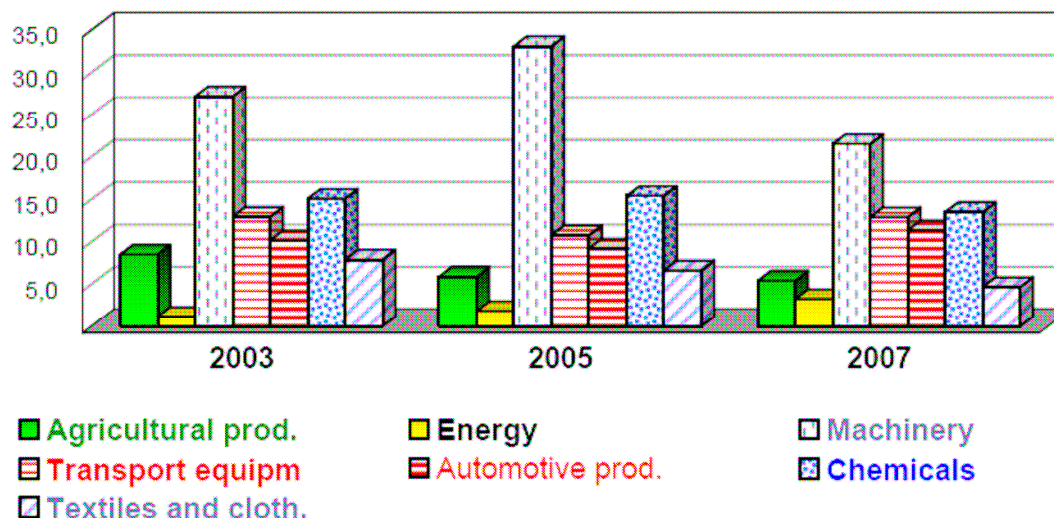
1.4 EU 27 Figures Import/Export UE 27 / CIS



from ... Ukraine



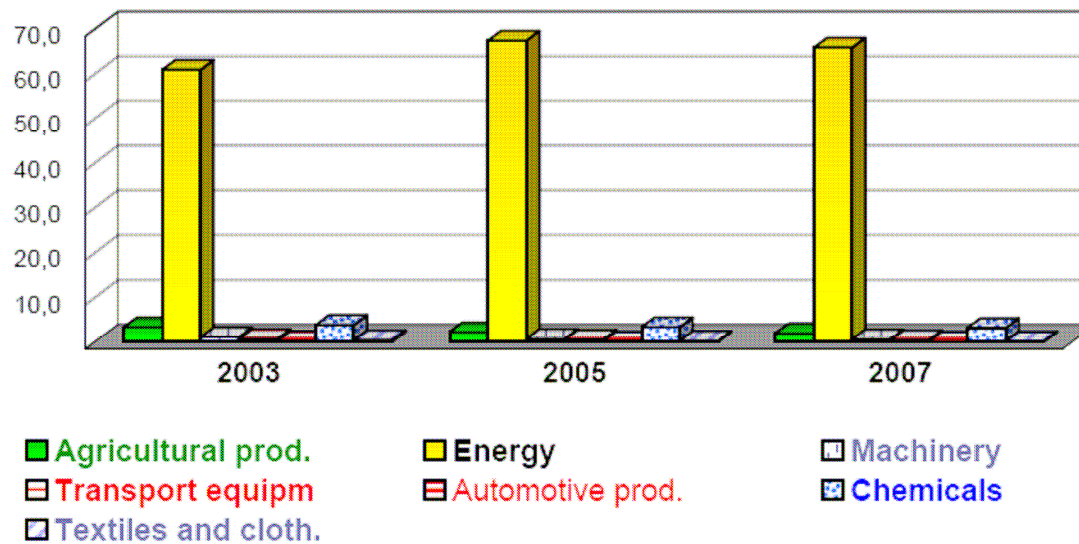
to ... Ukraine



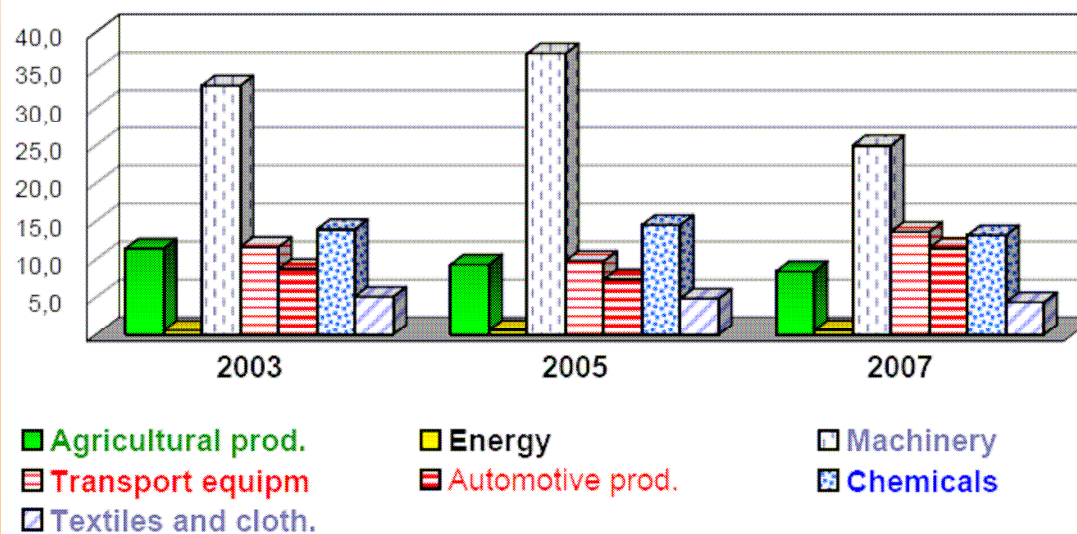
1.4 EU 27 Figures Import/Export UE 27 / CIS



from ... Russia

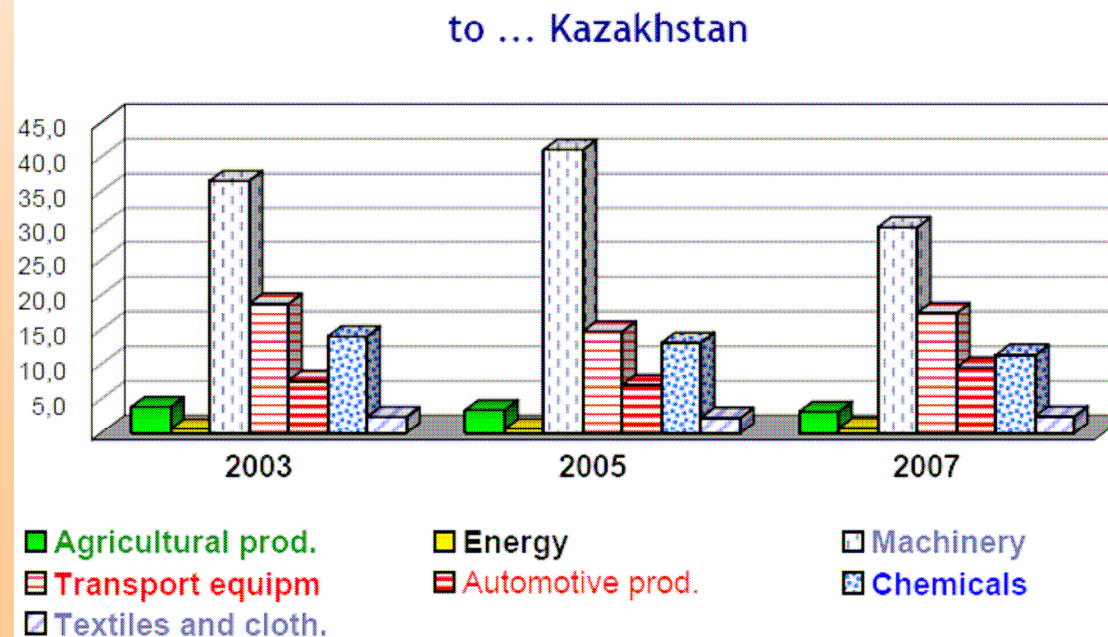
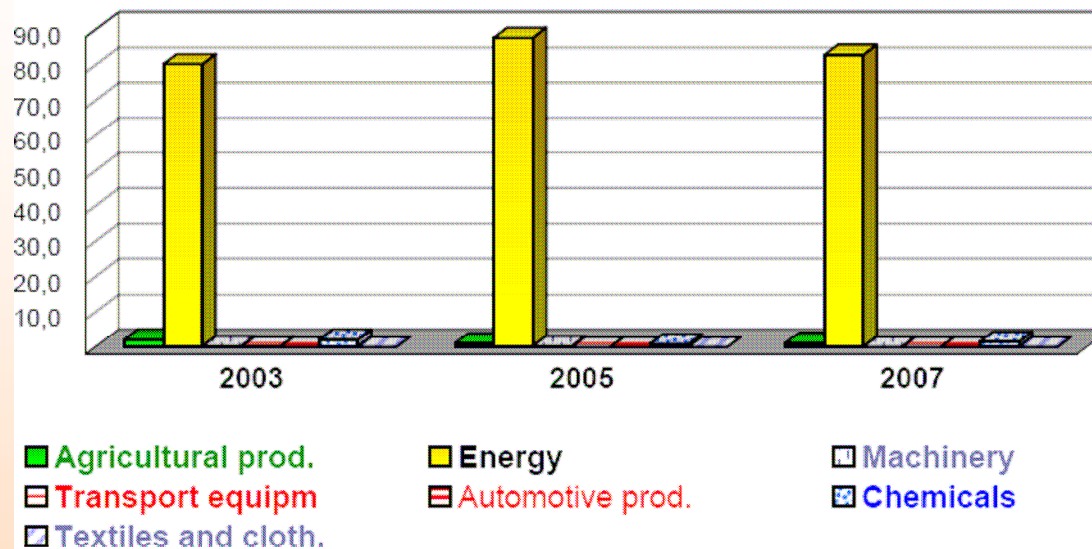


to ... Russia



1.4 EU 27 Figures Import/Export UE 27 / CIS

from ... Kazakhstan



2.1- EU 27 AS BLACK SEA IMPORTER



EU 27 Wheat Imports by Origin MMt.

IMPORTS	2006	2007	2008
USA	497	1.613	893
CANADA	856	946	1.043
ARGENTINE	6	11	7
TOTAL AMERICA	1.359	2.570	1.943
TURKEY	9	23	0
CROATIA	57	173	3
SERBIA	23	168	1
OTHERS EU (NON EU 27)	89	364	4
UKRAINE	581	179	3.694
	18,32%	3,74%	57,71%
RUSSIA	69	1.230	497
	2,18%	25,70%	7,76%
KAZAKHSTAN	313	422	201
	9,87%	8,82%	3,14%
MOLDOVA	60	3	36
TOTAL CEI	1.653	1.834	4.428
	52,1%	38,3%	69,2%
AUSTRALIA	69	6	25
OTROS	1	12	1
TOTAL SOFT WHEAT	3.171	4.786	6.401
TOTAL DURUM WHEAT	1,70	1,90	1,00
TOTAL WHEAT	4,80	6,70	7,40

3 Years
Average: 53 %

2.2- EU 27 AS BLACK SEA IMPORTER



EU 27 Corn Imports by Origin MMt.

IMPORTS	2006	2007	2008
USA	33	48	38
CANADA	-	5	12
CROATIA	54	-	267
SERBIA	614	63	612
BRASIL	3.538	7.876	645
PARAGUAY	236	627	10
ARGENTINE	2.462	4.233	257
UKRAINE	79	1.094	508
	1,11%	7,79%	20,58%
RUSSIA	66	66	119
	0,93%	0,47%	4,82%
% RUSSIA + UKRAINE	2,04%	8,26%	25,41%
TOTAL	7.115	14.050	2.468

3 Years
Average: 12 %

2.3- EU 27 AS BLACK SEA IMPORTERS



EU 27 TOTAL IMPORTS MMt.

IMPORTS	2006	2007	2008	2009	2010
Soft Wheat	3,6	4,5	5,7	4,5	4,5
Durum Wheat	1,7	1,9	1,1	0,4	2,4
Total Wheat	5,3	6,4	6,8	4,9	6,9
Corn	5,2	14,9	3	3	3,3
Barley	0,4	0,3	0,5	0,3	0,3
Others	0,8	6	0,4	0,2	0,8
TOTAL	11,7	27,6	10,7	8,4	11,3
From Black Sea	1,708	3,885	5,319		
= % Total	14,60%	14,08%	49,71%		

**3 Years
Average: 26 %**

2.4.1 - EU 27 AS BLACK SEA IMPORTER

EU 27 Commision Import Tariffs after May 1th 2009



€uros/Mt

PRODUCT	MAY 1th 2009	Previous
Durum Wheat Hight Quality	0	0
Soft Wheat Hight Quality	0	0
Medium & Low Quality Wheat TRQ	12	0
Medium & Low Quality Wheat Non Quota	95	0
Barley Non Quota	93	22.77
Rye	37.15	40.96
Sorghum	37.15	40.96
Corn	18.95	16.50

2.4.2 - EU 27 AS BLACK SEA IMPORTER

Custom system in EU 27. TQR



Description	Volume (tonnes)	IQR
Durum wheat	50.000	0%
Wheat	300.000	0%
Grain sorghum	300.000	Reduced by tender
Millet	1.300	7 €/Tm
Worked Oats	10.000	0%
Bran, sharps and other residues	475.000	30.6-62.25 €/Tm
Common wheat (total)	2.989.240	12€/Tm
Common wheat (USA)	572.000	12€/Tm
Common wheat (Canada)	38.853	12€/Tm
Common wheat Others)	2.371.600	12€/Tm
Common wheat (erga omnes)	6.787	12€/Tm
Barley	306.215	16 €/Tm
Malting barley	50.000	8 €/Tm
Mixture of malt sprouts and barley screenings (code 91)	100.000	0%
Mixture of malt sprouts and barley screenings (code 90)	20.000	0%
Preparation of a kind used in animal feeding	5.500	7%
Corn gluten (USA)	10.000	16%

Description	Volume (tonnes)	IQR
Maize (Spain)	2.000.000	Reduced by tender
Maize (Portugal)	500.000	Reduced by tender
Maize	242.074	0%

2.4.3 - EU 27 AS BLACK SEA IMPORTER



Actual Situation TRQs (week 20/2009)

2009	WHEAT			BARLEY		CORN	
	Subcont 3 Other Countries	Subcon 2 Canada	Subcon 3 USA	Feed Baley	Malting Barley		
JANUARY	594.597	38.853	572.000	306.215	50.000	121.037	
FEBRUARY							
MARCH							
APRIL							
MAY	594.597						
JUNE							
JULY							
AUGUST							
SEPTEMBER	594.597					121.037	
OCTOBER							
NOVEMBER							
DECEMBER							
TOTAL CONTINGENT	2.378.388	38.853	572.000	306.215	50.000		242.074
USED CONTINGENT	1.189.194	538	-	46.450	-		121.037
AVAILABLE QUOTA	1.189.194	38.315	572.000	259.765	50.000		121.037

2.4.4 - EU 27 AS BLACK SEA IMPORTER



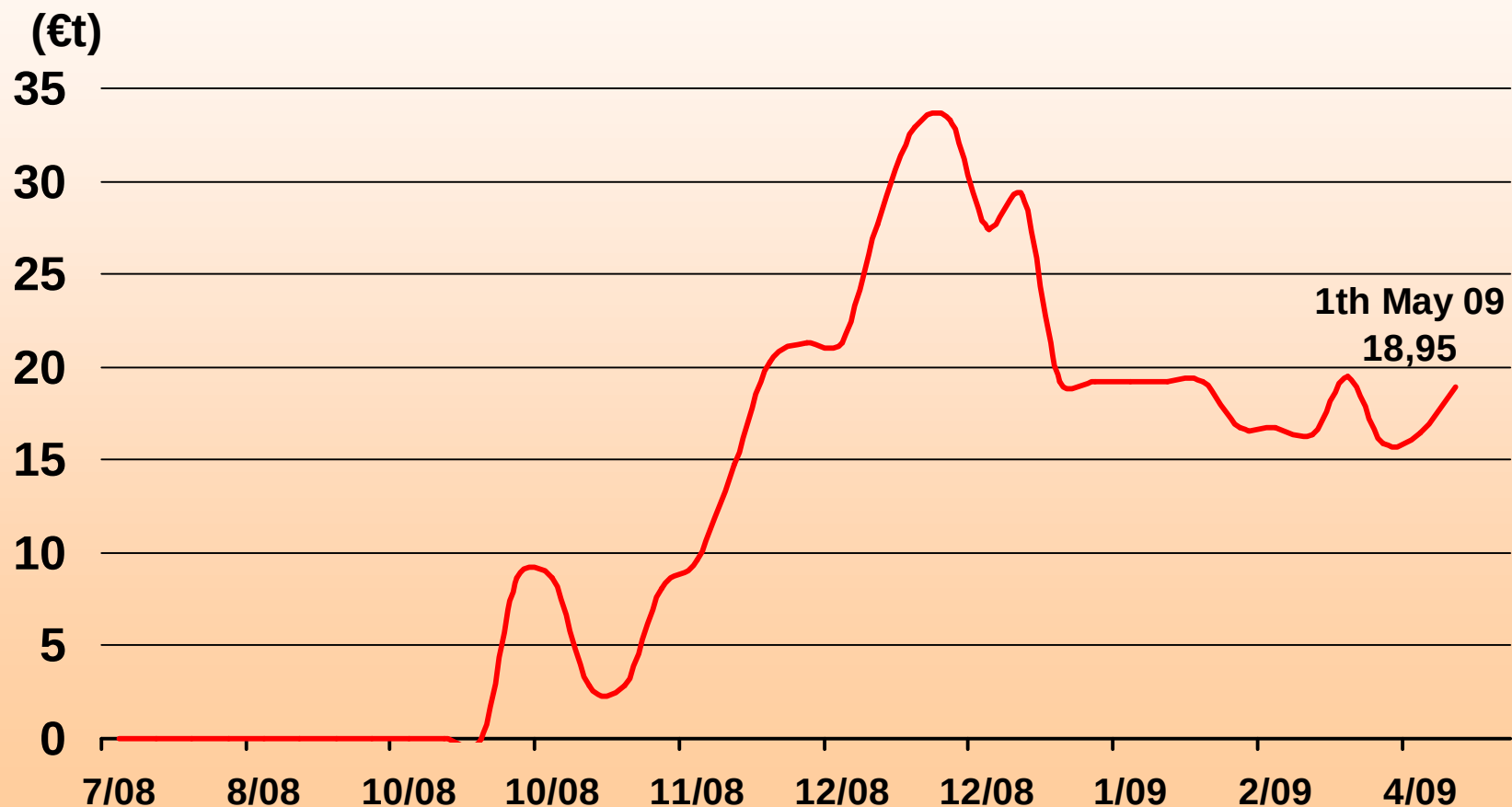
Wheat clasification in the custom

Quality	High	Allowance	Medium/low
Protein min	14%	-0,7	11,50%
Test Weight min	77 Hg/Hl	-0,5	74 Kg/Hl
Foreing Matter	1,50%	0,5	1,50%



2.4.5 - EU 27 AS BLACK SEA IMPORTER

EU 27 CORN IMPORT DUTY EVOLUTION



3.1- EU 27 AS COMPETITOR OF BLACK SEA GRAINS IN THIRD COUNTRIES



WHEAT: UE 27 EXPORT TO THIRD COUNTRIES			
	2.006	2.007	2008 (1jul/31mar)
W EUROPE (NON UE 27)	388	507	573
E EUROPE (NON UE 27)	231	399	466
TURKEY	283	551	339
MOROCCO	749	2.133	2.916
ALGERIA	3.164	2.361	3.882
TUNISIA	241	342	370
EGYPT	537	175	1.161
LIBYA	194	235	273
OTHERS AFRICA	2.455	1.730	3.158
AMERICA	89	105	300
IRAN	-	-	2.112
IRAK/JORDAN	282	1	650
YEMEN	127	237	673
BANGLADESH	121	17	58
CHINA	-	-	50
OTHERS ASIA	1.534	449	2.145
OTHERS	12	8	370
TOTAL SOFT	10.407	9.250	19.496
TOTAL WHEAT	12.800	11.200	22.000 (F)

3.2- EU 27 AS COMPETITOR OF BLACK SEA GRAINS IN THIRD COUNTRIES



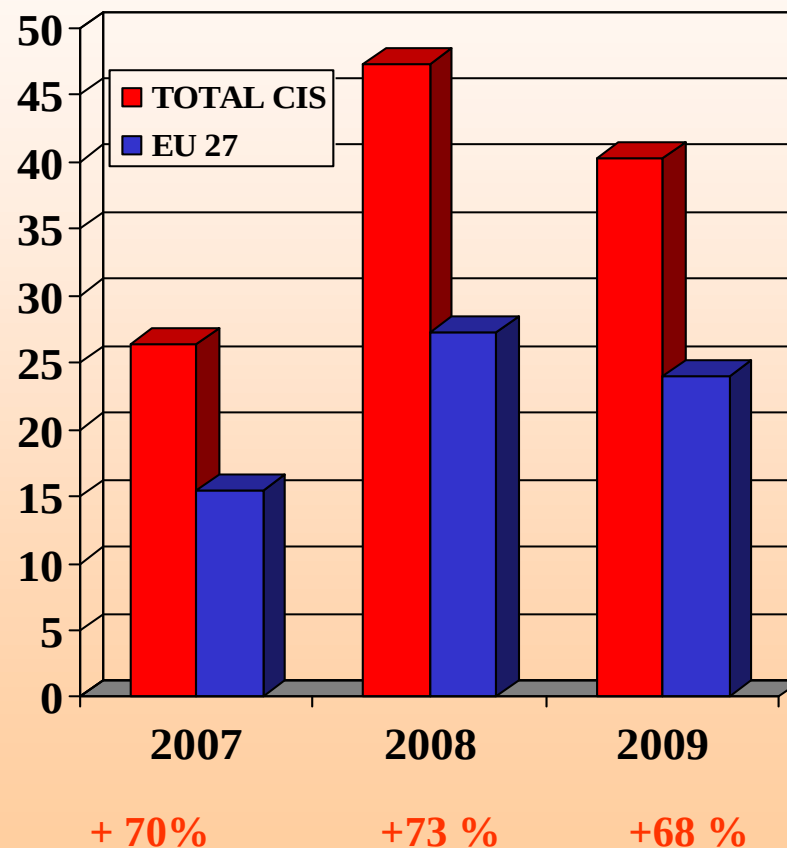
BARLEY: UE 27 EXPORT TO THIRD COUNTRIES			
	2.006	2.007	2008 (1jul/31mar)
W EUROPE (NON UE 27)	161	150	99
E EUROPE (NON UE 27)	78	85	77
TURKEY	50	82	150
MOROCCO	306	316	360
ALGERIA	89	19	370
TUNISIA	345	417	270
LIBYA	6	14	80
OTHERS AFRICA	6	6	32
AMERICA	45	-	50
IRAN	103	-	120
IRAK/JORDAN	454	246	25
SAUDI ARABIA	1.507	2.142	1.780
CHINA	9	103	300
OTHERS ASIA	136	166	747
TOTAL	3.295	3.746	4.460

3.3- EU 27 AS COMPETITOR OF BLACK SEA GRAINS IN THIRD COUNTRIES.



Total export EU 27 / CIS

	2007	2008	2009 F
UKRAINE			
Wheat	1	11,5	6
Corn	2,1	4,5	2,5
Barley	1	6,1	4,5
TOTAL	4,1	22,1	13
RUSSIA			
Wheat	12,2	17,1	17,5
Corn	0	0,8	1
Barley	1,03	2,1	1,6
TOTAL	13,23	20	20,1
KAZAKHSTAN			
Wheat	8,2	4,5	6,5
Corn	0	0	0
Barley	0,8	0,6	0,6
TOTAL	9	5,1	7,1
TOTAL CIS	26,33	47,2	40,2
EU 27			
Wheat	11,2	21,5	18
Corn	0,5	1,5	1
Barley	3,8	4,3	5
TOTAL	15,5	27,3	24



3.4- EU 27 AS COMPETITOR OF BLACK SEA GRAINS IN THIRD COUNTRIES



EU 27 + Ukraine + Russia Exports

EXPORTS 2008/2009 (July / March)														
	TOTAL CEREALS	SOFT WHEAT					BARLEY				CORN			
		TOTAL IMPORT	EU 27	UKRAINE	RUSSIA	KAZAK.	TOTAL IMPORT	EU 27	UKRAINE	RUSSIA	TOTAL IMPORT	EU 27	UKRAINE	RUSSIA
EGYPT	12,3	8,1	1,161	0,983	3,662	0,531					4,2	0,068	0,606	0,387
IRAN	12,2	7,5	2,112	0,19	0,548	0,229	1,7	0,12	1,101	0,149	3		0,422	0,035
UE 27	10,3	6,8		3,026	0,89	0,1	0,5		0,161	0,106	3		0,364	
SAUDI ARABIA	9,7	1					7	1,78	2,14	0,737	1,7			
ALGERIA	8,5	5,8	3,882				0,5	0,37	0,076		2,2	0,183	0,18	
MOROCCO	5,4	3,5	2,916				0,4	0,36	0,048		1,5	0,028	0,069	
SYRIA	4,4	1			0,605		1,8	0	0,773	0,426	1,6	0,2	0,356	0,055
IRAK	3,5	3,5			0,199							0,09		
TUNICIA	3,2	2	0,37	0,282	0,327		0,5	0,27	0,104	0,083	0,7	0,091	0,162	
ISRAEL	3,1	2	0,1	0,702	0,281		0,4		0,177	0,093	0,7	0,146	0,165	0,059
TURKEY	3	2,7	0,339	1,79	1,79	0,25		0,15		0,052	0,3	0,018	0,056	0,058
PAKISTAN	3	3	1	0,2	1,467									
YEMEN	2	2	0,673	0,426	0,427									
JORDAN	1,8	1	0,65 *	0,252	0,496		0,5	0,025 *	0,312	0,05	0,3	0,025	0,061	
LIBYA	1,6	1,3	0,273	0,205	0,398		0,3	0,08	0,108	0,016		0,042		
AZERBAIJAN	1,155	1,155			1,155									
LEBANON	0,5	0,5		0,216	0,216					0,011			0,161	0,054

4- Conclusions



❖ SOFT WHEAT (main matter)

- Imports: 53 % of EU imports from Black Sea, Mostly Feed Wheat.
- Exports: CIS export 70% more than EU 27. We compete on North Africa and Middle East specially on Milling wheat.

➤ CORN

- Imports: 12% of EU 27 imports are from Black Sea.
- Export: CIS export 73% more tha EU 27.

❖ BARLEY

- Imports: EU import not big quantities but near 100% from CIS.
- Exports: not big competition

❖ TOTAL Grains:

- Imports: 26 % of EU 27 imports are from Black Sea.
- Exports: CIS export 70% more than EU 27.



EU as importer of Black Sea Grains and as competitor in third countries



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Thanks for your kind attention

SOURCES: EU Commission; USDA; Tallage; ONIC ; COCERAL;



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