

## Badia EL AKARI (FNCL)

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**De:** Hanine TAZI  
**Envoyé:** mardi 23 février 2021 16:16  
**Objet:** Documents Webinar French maize offer 2020-2021 (France Export Céréales / ARVALIS)  
**Pièces jointes:** ANGLAIS\_PREZ T. JOLY MAIS PAYS-BAS 23.02.21.pdf; ANGLAIS\_PREZ J. DANEL MAIS\_PAYS-BAS 23.02.21.pdf; ANGLAIS\_PREZ F.CAMET LASSALLE MAIS PAYS-BAS 23.02.21.pdf

Chers Adhérents,

Suite à la visioconférence de ce jour, organisée par France Export Céréales et Arvalis, et relative à l'**offre française de Maïs**, veuillez trouver en pièces jointes les documents qui y ont été présentés.

Bonne réception et meilleures salutations.



Hanine TAZI  
Directeur  
0654 70 70 44  
[hanine.tazi@fncl.ma](mailto:hanine.tazi@fncl.ma)  
[www.fncl.ma](http://www.fncl.ma)

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**De :** Madelon Bastemeijer <m.bastemeijer@graan.com>  
**Envoyé :** mardi 23 février 2021 15:50  
**À :** Madelon Bastemeijer <m.bastemeijer@graan.com>  
**Objet :** Webinar French maize offer 2020-2021

Good afternoon,

Please find enclosed the presentations given during the above webinar of this afternoon.  
We would like to thank all speakers for their contribution and France Export Céréales for the organization.

Met vriendelijke groet / with kind regards,  
Madelon Bastemeijer  
(aanwezig op maandag, dinsdag en vrijdag)



Het Comité van Graanhandelaren  
Louis Braillelaan 80, 2719 EK Zoetermeer

[madelon.bastemeijer@graan.com](mailto:madelon.bastemeijer@graan.com)  
tel: +31 (0)10-467 31 88  
mobiel: +31 (0)6-111 272 30

*Brochure: [Dutch Trade in Grains, Seeds and Pulses](#)  
Bekijk de [brochure](#) over Het Comité  
Have a look at the [brochure](#) about Het Comité*



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## Review of 2020 french corn production

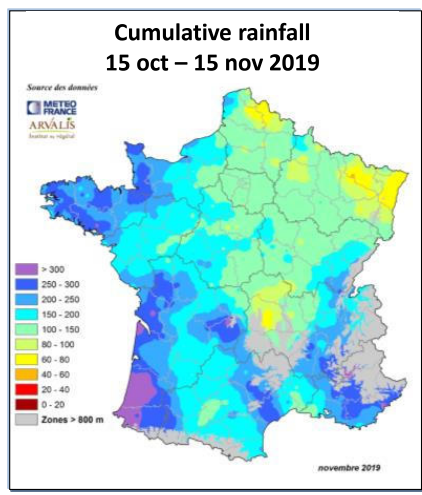
**Thomas JOLY**  
*ARVALIS – Institut du végétal*



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## Fall 2019

- Excess of water, plots access limited
- Difficulty for harvesting corn -> until the beginning of january in some cases
- Sowing of cover-crop / inter-crop were difficult, sometimes impossible
- Not able to sow winter crops / cereals
  - Carry forward to late varieties
  - Then sowing of spring cereals
  - Then on other spring species (Maize / Sunflower / Soybean / Sorghum)



Cumulative rainfall  
15 oct – 15 nov 2019

Source des données  
MÉTÉO FRANCE  
ARVALIS  
Institut du végétal

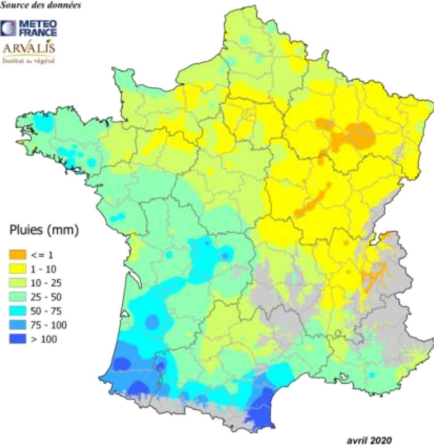
novembre 2019

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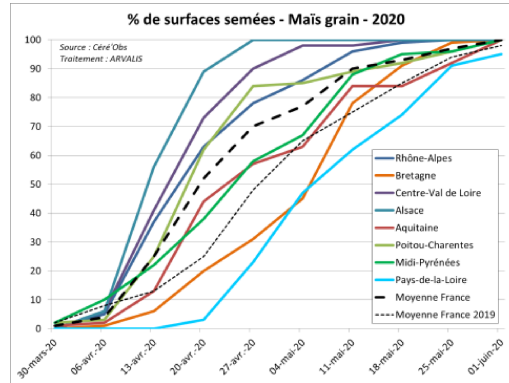
## Dry conditions for corn sowing 2020

Cumulative rainfall  
15 Mar – 15 Apr 2020

Source des données  
MÉTÉO FRANCE  
ARVALIS  
Institut de végétal



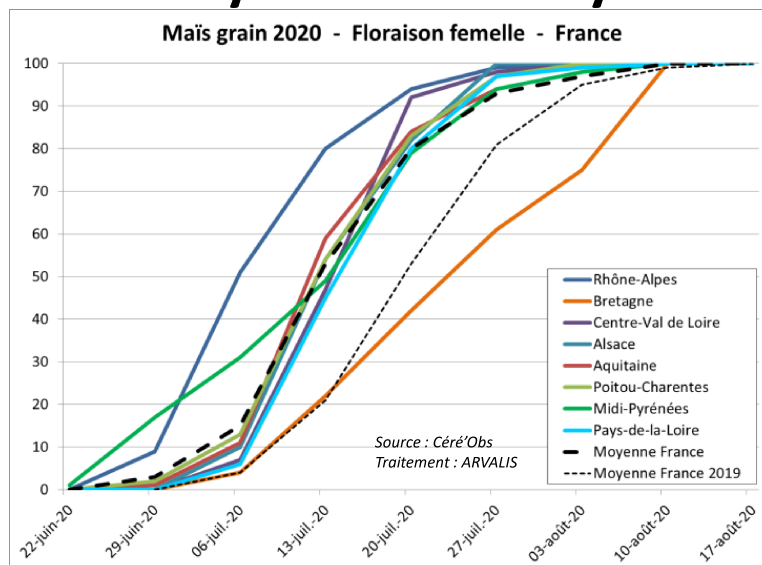
Evolution of corn sowing



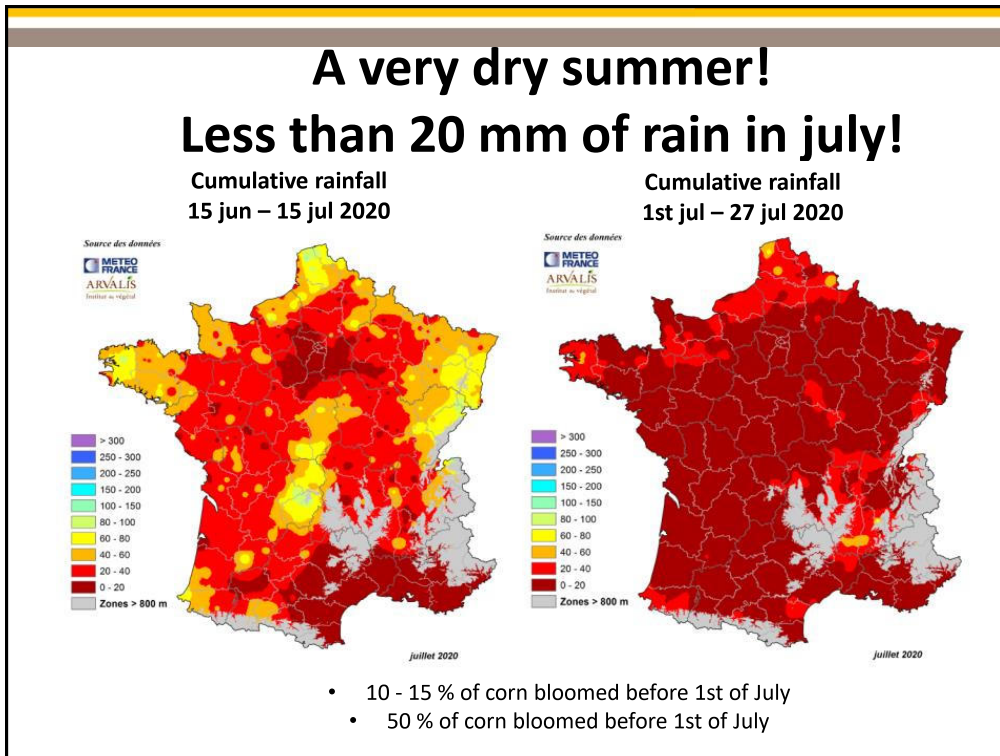
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## Blooms centered on a very dry month of July

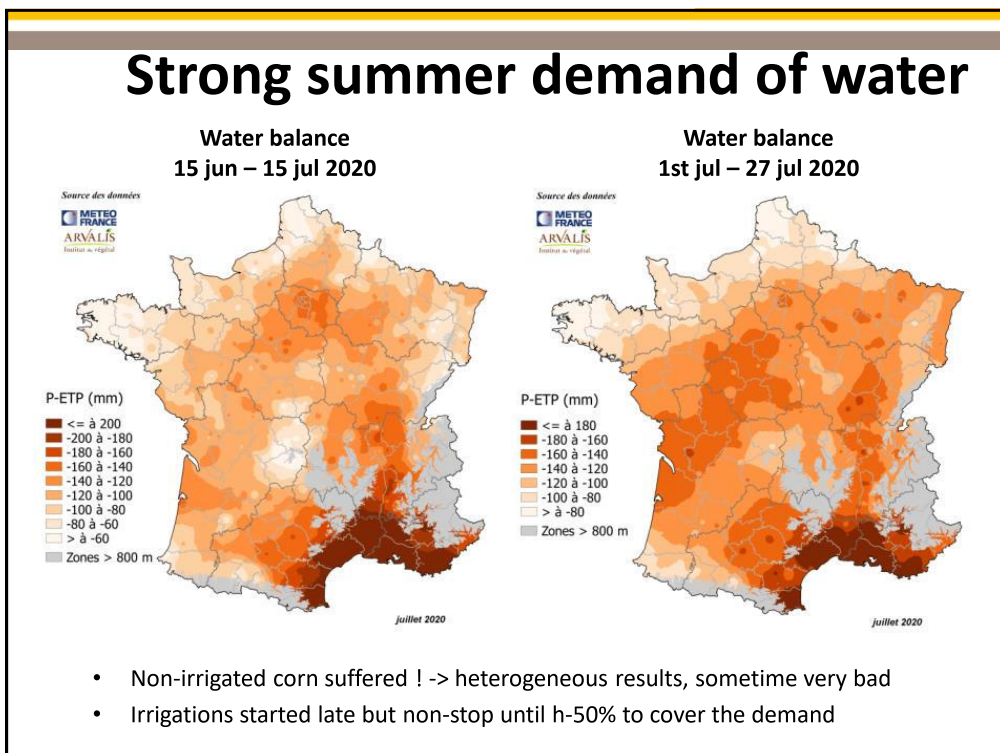
Maïs grain 2020 - Floraison femelle - France



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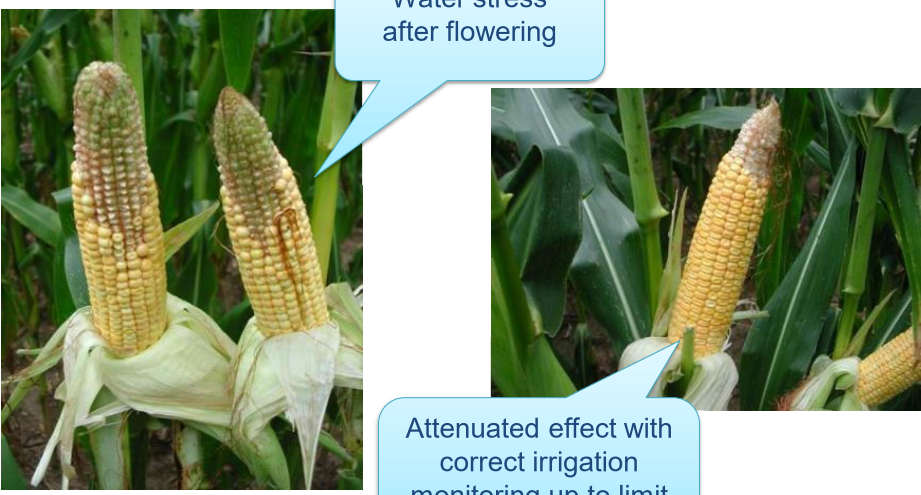
**Spikes characteristic of water stress pre-flowering and at flowering**

- On about ten crowns the eggs are atrophied and the silks have not been emitted outside the husks
  - A few well-developed but unfertilized eggs: late release of the silks ?



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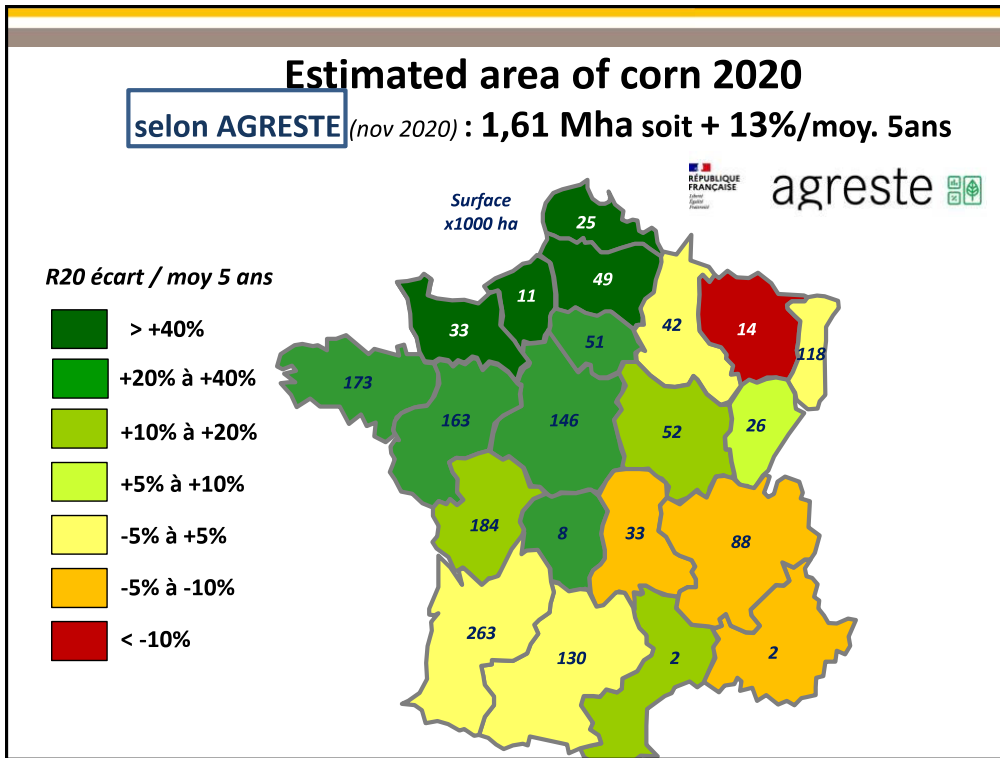
→ Regulation at the top of the corncob  
→ Loss of grain on part of the rows



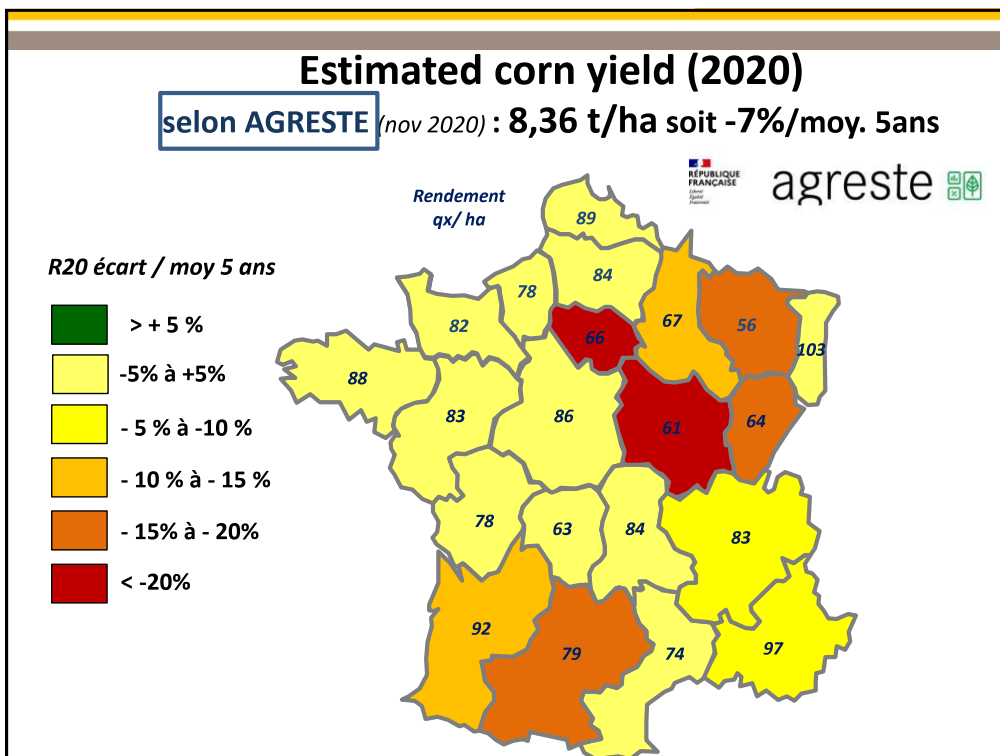
Water stress after flowering

Attenuated effect with correct irrigation monitoring up to limit of grain abortion

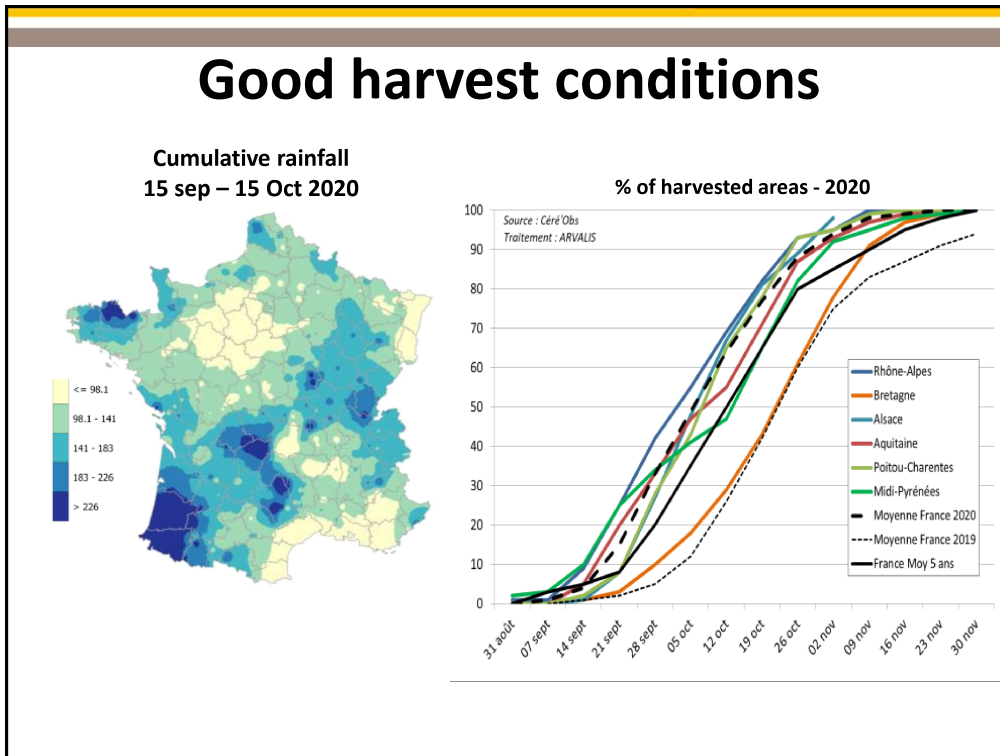
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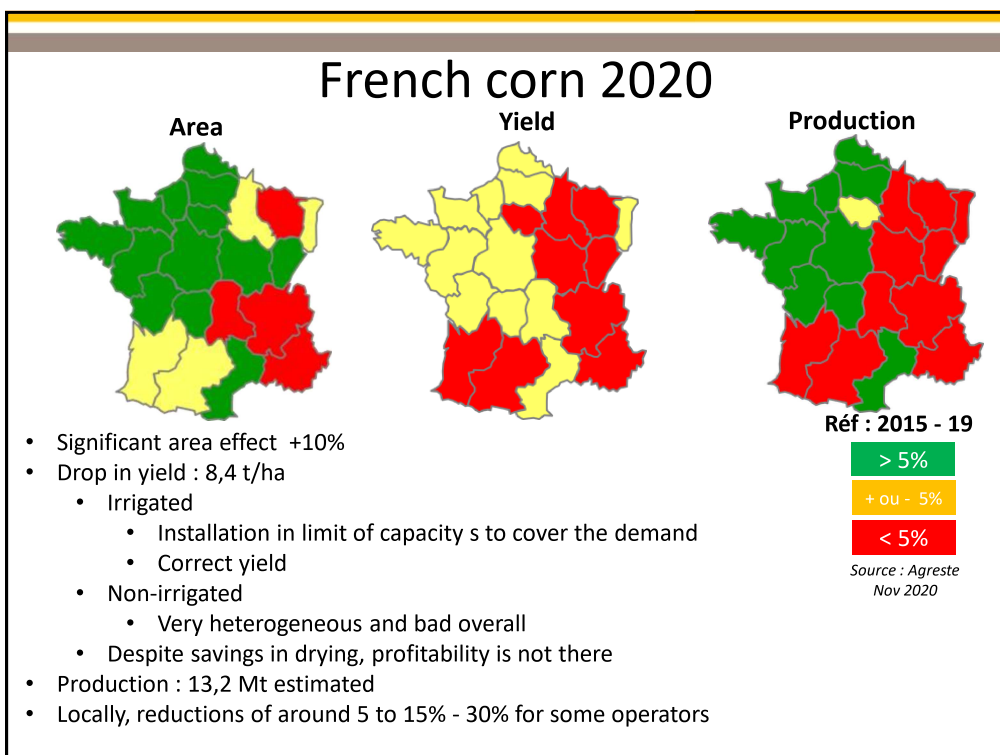
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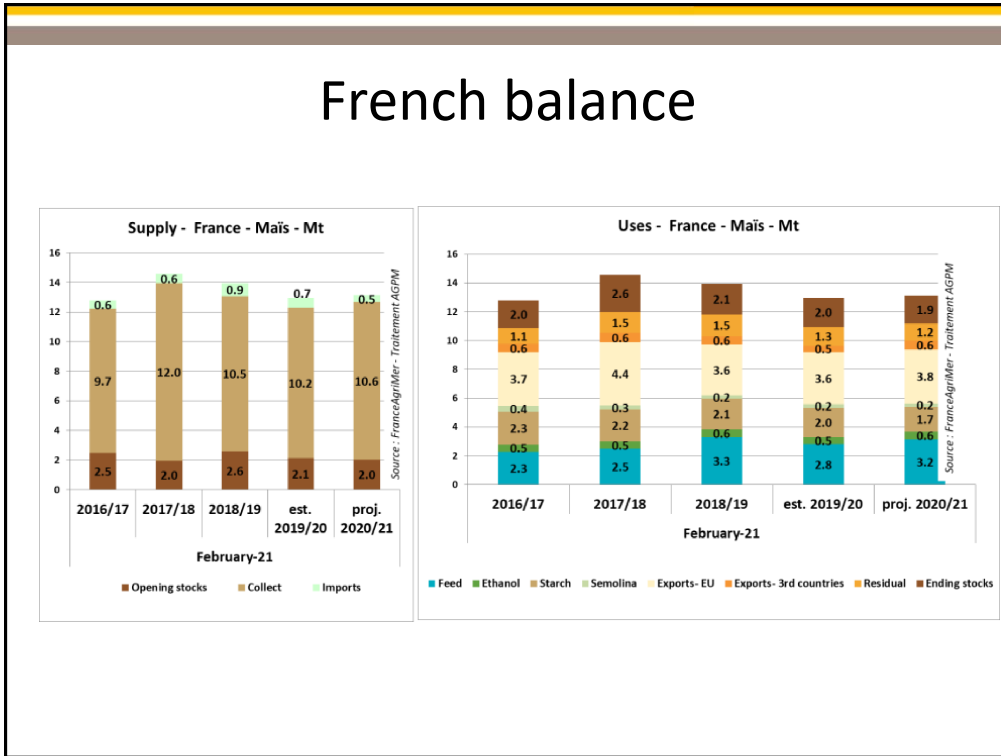
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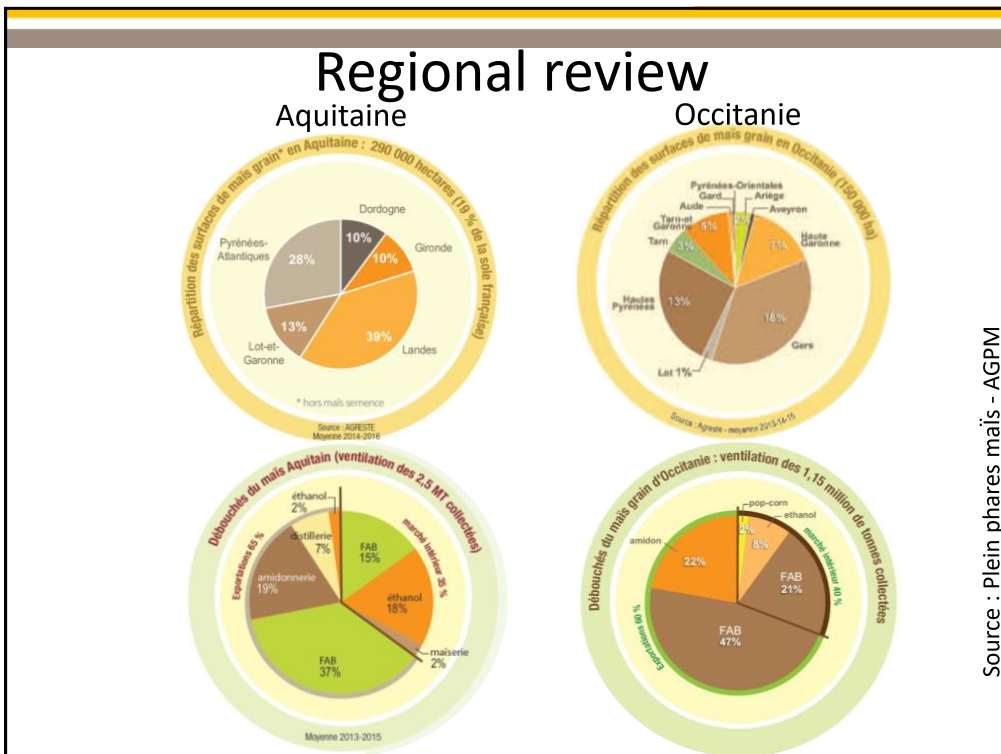
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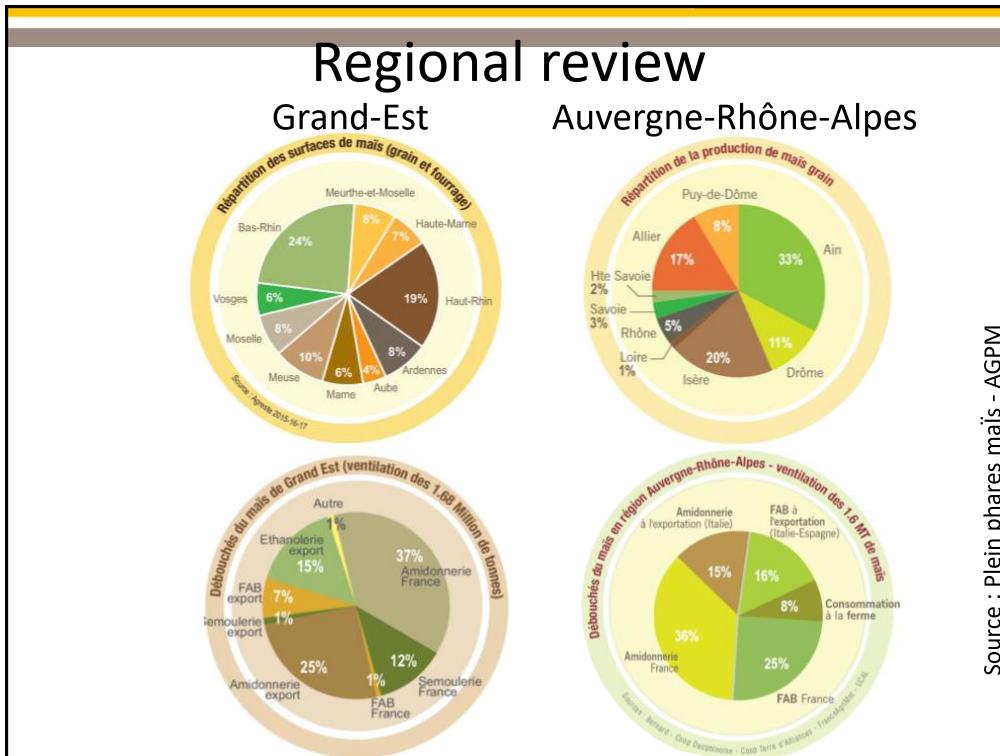
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Source : Plein phares maïs - AGPM

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## Sowing intentions 2021

- Good conditions for sowing during fall
- Wheat price in ↗

**Increase in the share of winter crops**  
 + 15 à 20 % of wheat compared to 2020  
 4,8 à 5,1 Mha

- Summer conditions in memory (hot and dry)
- Adjustment according to water resources
- Comparative profitability of other crops

**Decrease in sole of spring crops**  
 -10 à -15 % of corn compared to 2020 ? Return to 2019 level or < ?  
 Slight decline – stability in traditional production regions, more significant decline in other less specialized regions

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**Thank you for your attention**

**Thomas JOLY**

*ARVALIS – Institut du végétal*

**ARVALIS**  
Institut du végétal



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## French corn – Harvest 2020 : Quality for animal feed

**Justine DANEL**  
*ARVALIS - Institut du végétal*



1

## French crop quality survey FranceAgriMer / ARVALIS


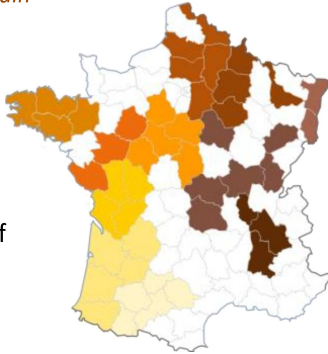
Quality Survey is conducted by FranceAgriMer and ARVALIS - Institut du végétal, with the support of Intercéréales to provide information on the quality of the cereals collected in silos

*For animal feed :                      Soft wheat, Barley, Triticale,  
Maize grain, Sorghum grain*

In 2020 : 245 samples of **maize grain** collected by storage companies and cooperatives from 46 departments :

- from silos at completion of drying
- global sample representative of 75-80% of dried maize.

⇒ 11 sample mixes by production area



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## French crop quality survey FranceAgriMer / ARVALIS

Analyses performed on maize:

- On 245 samples:
  - Rapid analyses by NIR :
    - Moisture,
    - Proteins,
    - Starch,
    - Fat
- On 11 mixes by production area:
  - Rapid analyses by NIR (Moisture, Proteins, Starch, Fat)
  - Physico – chemical analyses :
    - Ash,
    - Fat (after hydrolysis),
    - Sugar,
    - Crude fibre,
    - NDF,
    - Water-insolubles cell walls,
    - Gross energy,
    - Promatest (indicator of the thermal shock suffered by the grain during drying)

Results on Dry Matter (DM) to facilitate comparison

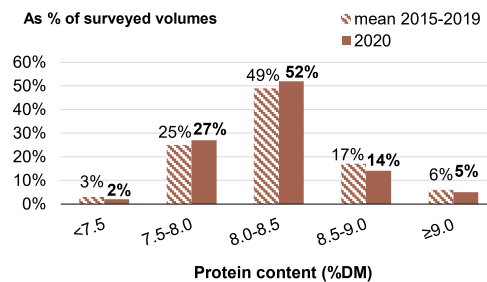


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## French Maize Quality – Harvest 2020 Protein

National mean 2020: 8.2%DM

- By production areas, values range from 7.9 to 9.0%DM
- 71% of samples with proteins content up to 8.0%DM and 19% up to 8.5%DM.

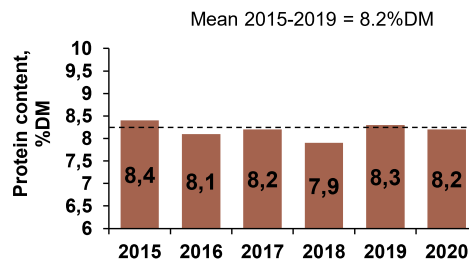


4

## French Maize Quality – Harvest 2020 Protein

2020 compared to previous years:

- Similar to 2019 and to the five-year mean
- Relatively homogeneous values in the last 6 years

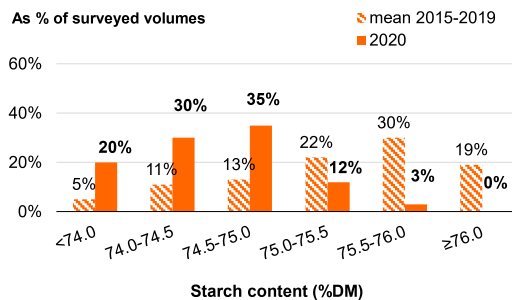


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## French Maize Quality – Harvest 2020 Starch

National mean 2020: 74.4%DM

- By production areas, values range from 73.4 to 74.9%DM.
- 80% of samples with a starch content up to 74%DM.

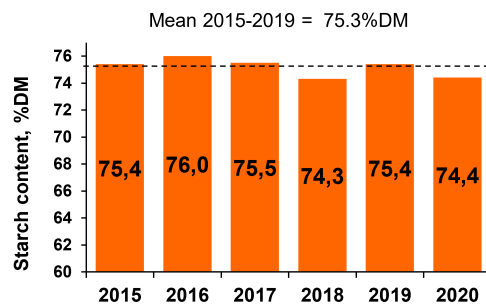


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## French Maize Quality – Harvest 2020 Starch

2020 compared to previous years:

- 1.0 point less than in 2019
- 0.9 point less than the 5-year mean

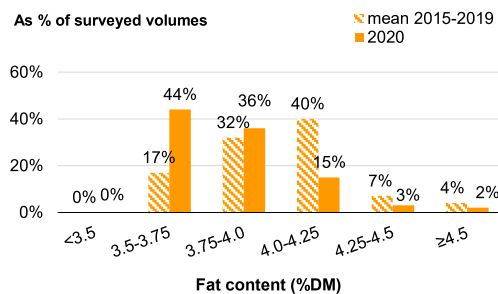


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## French Maize Quality – Harvest 2020 Fat

National mean 2020: 3.8%DM

- The values range from 3.6 to 4.2%DM.



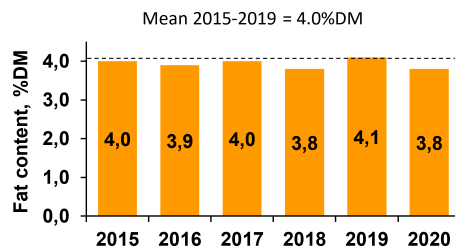
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## French Maize Quality – Harvest 2020

### Fat

2020 compared to previous years:

- Value slightly lower than in 2019 and the 5-year mean (respectively 4.1 and 4.0%DM).



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## French Maize Quality – Harvest 2020

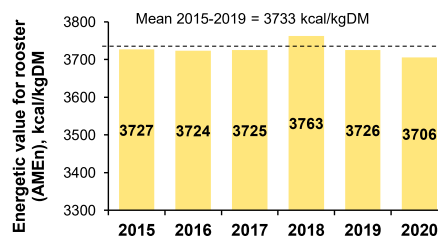
### Energetic value for rooster

Energetic value for rooster (AMEn) estimated by the equation of Barrier-Guillot *et al.* (2001) :

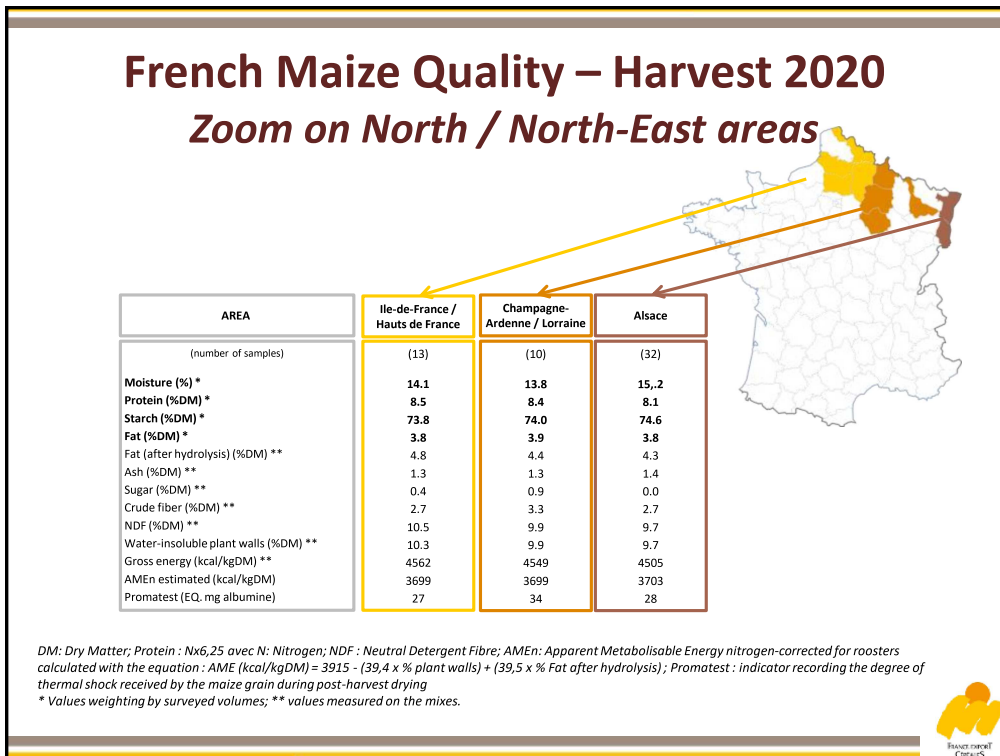
$$AMEn \text{ (kcal/kgDM)} = 3915 - (39,4 \times \% \text{ plant walls}) + (39,5 \times \% \text{ fat (after hydrolysis)})$$

National mean 2020 : 3706 kcal/kgDM


- The values range from 3679 to 3718 kcal/kgDM



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## Thank you for your attention



**Justine DANEL**  
ARVALIS - Institut du végétal



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# FRENCH MAIZE OFFER

Franck CAMET-LASSALLE



euràlis  
NOURRIR VOTRE CONFIANCE



Charte Qualité Maïs  
Classe

French maize offer – Webinar – February 23, 2021

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## SOMMAIRE

- PRESENTATION CHARTE MAIS CLASSE A
  - An association for corn
  - Traceability, physical and health quality
- PRESENTATION EURALIS
  - General presentation of the cooperative
  - Cereals activity
- Corn Market, France's place on the market
  - A market that has evolved
  - The strengths of the French offer



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3

### General presentation of the charter

- 6-7** Million tons corn traced
- 5** Port outlets
- 20 000** committed farmers
- 20 years of expertise** In the service of quality Maize class A
- 140** member corn collectors

4



### The charter today: the 10 key commitments around traceability, physical and health quality

- Ensure the traceability of seeds bought and sold
- Have procedures for managing the lots collected
- Check the physical quality on reception
- Limit pre-storage
- Select and audit subcontractors
- Inform farmers about good harvesting and drying practices
- Make harvest operators aware of qualitative and economic issues
- Join a HACCP-type quality approach and have a control plan
- Participate in the monitoring plans developed by the Charter
- Follow the mandatory annual training provided by the Charter



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### Class A corn: an opportunity for export markets



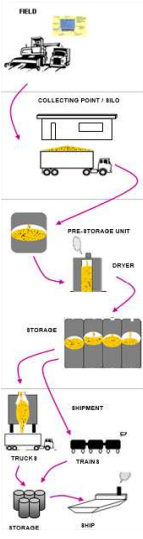
- 20 European, African and Asian countries are regular customers
- 4 ports on the Atlantic coast constitute an opportunity for these export markets




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### The advantages of the Class A Corn Quality Charter



- Compliance with EU and French regulations
- Ensure the traceability of non-GMO corn
- Ensure the physical and sanitary quality of corn



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## EURALIS CORPORATE PRESENTATION



WE PRODUCE  
QUALITY  
FOOD FOR  
EVERYONE



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## EURALIS : A MAJOR PLAYER IN AGRICULTURE AND FOOD PROCESSING

ONE ORGANISATION, 4 DIVISIONS:  
KEEPING CLOSE TO OUR CUSTOMERS' NEEDS

AGRICULTURAL DIVISION

SEED DIVISION

FOOD DIVISION

INVESTMENTS AND DEVELOPMENT DIVISION

### BREAKDOWN OF TURNOVER BY DIVISION

9% INVESTMENTS AND DEVELOPMENT DIVISION

14% SEED DIVISION

38% AGRICULTURAL DIVISION

39% FOOD DIVISION



GROSS TURNOVER  
€1.46 BN



5,200 EMPLOYEES

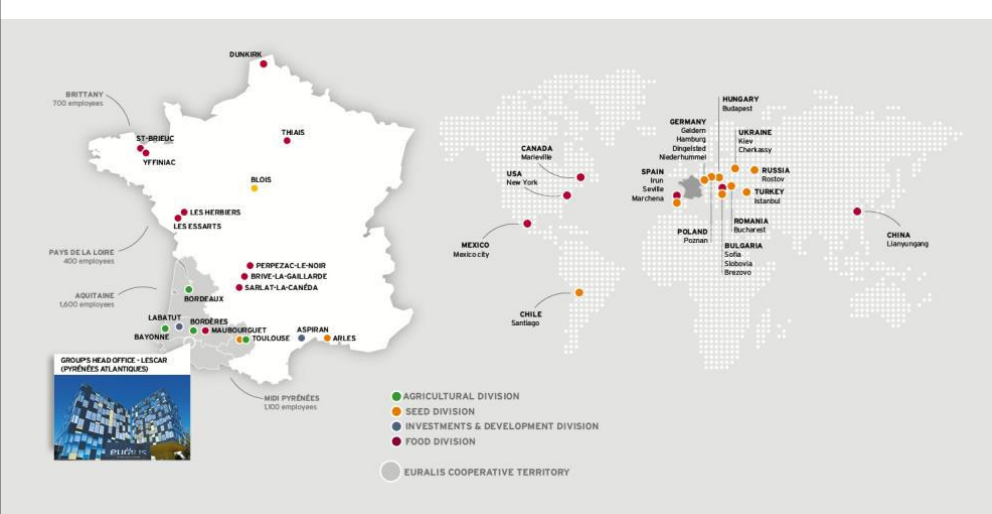
> 4,200 IN FRANCE  
> 1,000 ABROAD IN 10 COUNTRIES

9 Pôle Agricole

eurälis  
NOURRIR VOTRE CONFIANCE

9

## ROOTED IN THE SOUTH-WEST, WE BRANCH OUT ACROSS FRANCE AND THE WORLD



10 Pôle Agricole

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AGRICULTURAL DIVISION  
**We improve the performance of our members' farms**

**A MAJOR EUROPEAN PLAYER IN THE MAIZE MARKET**

**1.2 MT OF CEREALS MARKETED** | **€484 MILLION IN TURNOVER (NET)**

**TOP SUPPLIER OF PRODUCTS AND SERVICES TO WINE GROWERS IN BORDEAUX AND BERGERAC**

**73 STORES** SELF-SERVICE AGRICULTURAL STORES/GARDEN CENTRES/PET SHOPS

**981 EMPLOYEES** | **12,000 FARMERS**

Division turnover is expressed as net.

**WHAT WE DO**

- Supply, collection and marketing of cereals
- Animal and plant production in the South-West
- Support from the vine to the wine
- Technical advice to farmers
- Agricultural and General Public distribution

11 Pôle Agricole

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## EURALIS – CEREALS ACTIVITY

- The cereals activity is in the territory of the cooperative in the South West of France

- EURALIS annual harvest = 1 million Tons
  - 80 % of corn

Category	Quantity (Tons)
straw cereals	134993
maiz	800000
other	79630

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## LES DÉBOUCHÉS DU MAÏS EURALIS

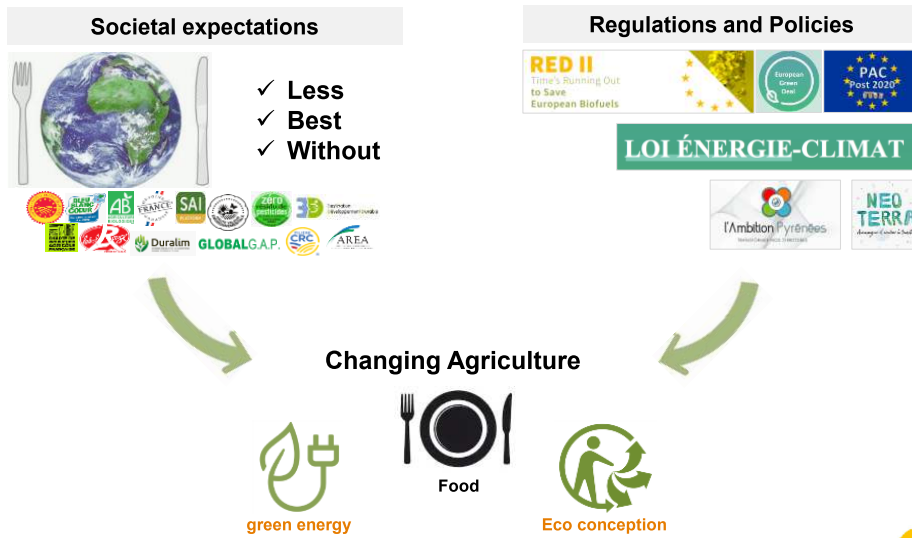


- 1/3 in France
  - Feed manufacturer under quality label
  - Bio ethanol
- 1/3 en Espagne
  - Starch
  - food Corn mill
- 1/3 en Export maritime
  - Distilleries
  - Waxy corn



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## CHANGING AGRICULTURE



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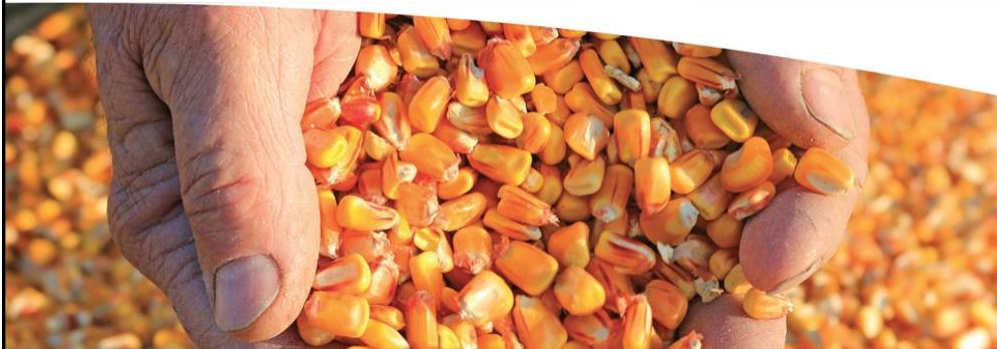
## AN EVOLVING EURALIS CORN OFFER

- Compliance with EU and French regulations
  - Ensure the traceability of non-GMO corn
  - Ensure the physical and sanitary quality of corn
- +
- Work on special corn supply chains (waxy, starch, ...)
  - Building sectors of preserved identities (1 seule variété), full traçabilité...
  - Building low-carbon sectors,
  - Develop sustainable and regenerative agriculture sectors (SAI, soil conservation...)
  - ....



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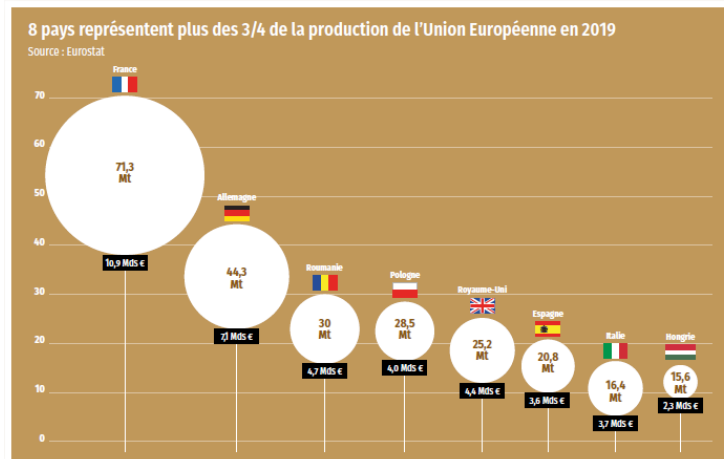
## Corn Market, France's place on the market



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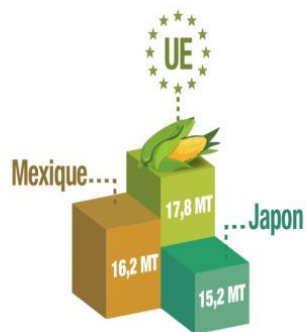


## FRANCE: MAJOR PLAYER IN EU PRODUCTION

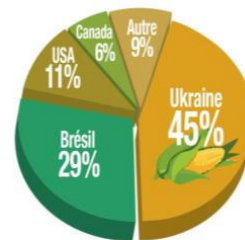


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## 2017/18: EU becomes the world's leading importer of corn



Imports 2017/18 campaign

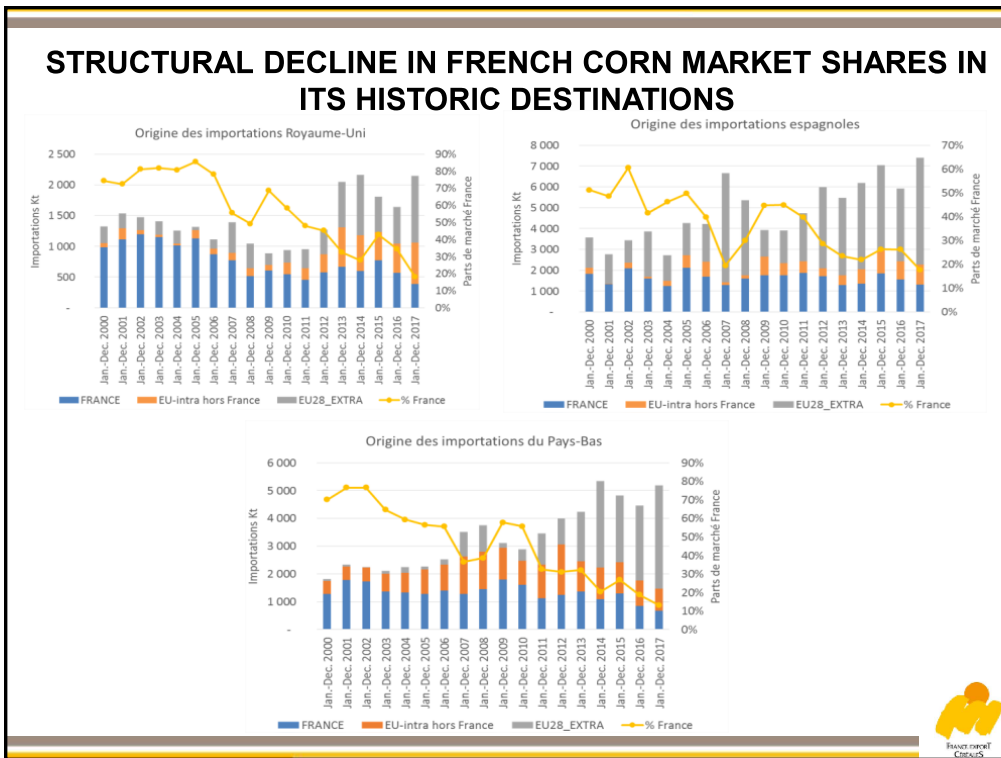


Origin of EU imports in 2017/18

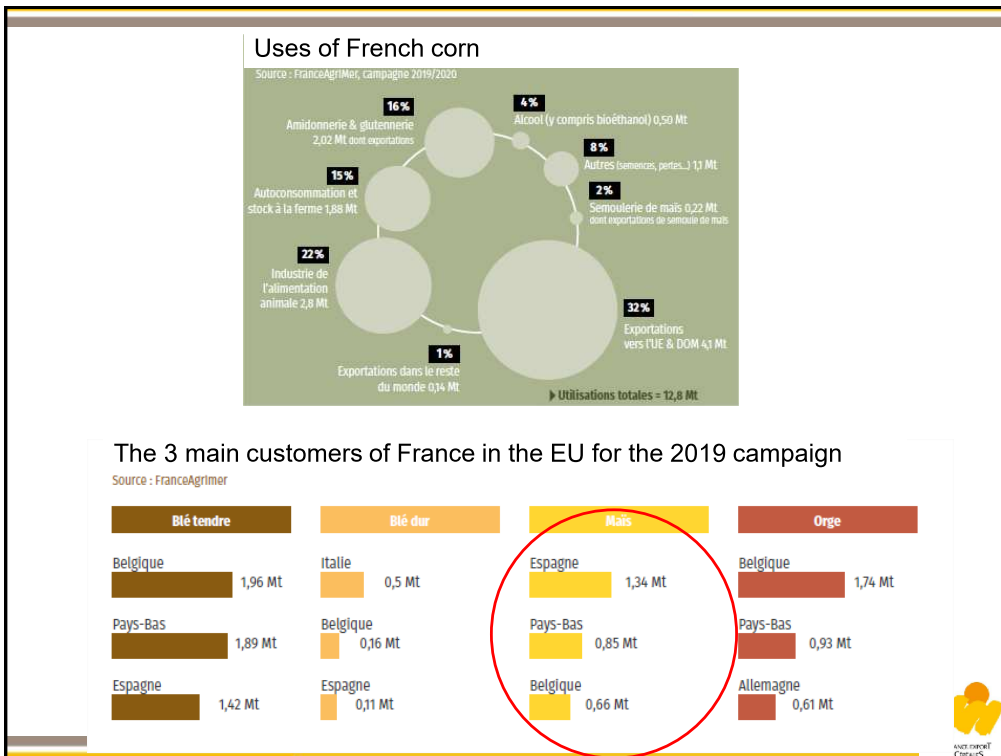
Sources : DG Agri, USDA



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## FRANCE: 2020 A BAD HARVEST

- Production = 12,2 MT
  - Exports = 4,5 MT
  - Stock = 1,9 MT
- Low offer= Little or no availability for sale at the end of the campaign

## NETHERLAND: IMPORTING MARKET

- Structural import of 4 MT of grain corn
  - Market segmented into 3:
    - Specifications market (non-GMO, waxy maize, Starch, etc.)
    - Sustainable Bio ethanol Market (opportunity / logistics)
    - Commodity market (importation of Brazilian or Ukrainian corn)
- Dutch demand is expressed structurally on the French origin **only** on the specialized market of specifications



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## THE ADVANTAGES OF FRENCH CORN

- Non-GMO traceability
- Ensure the physical and sanitary quality of corn
- CSR = respect for Societal and Environmental expectations
- Carbon footprint = Proximity production – consumption
- Security and regularity of supplies = Logistics
- Co-construction of specific specifications
- .....

→ **When the unmarked market expresses the societal and environmental expectations of consumers, then French corn will be a solution!**



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# Thank you for your attention

