



# **RICE MARKET**

**Committee for the Common Organisation  
of Agricultural Markets**

**21 December 2017**



# CONTENTS

- 1. Global Rice Market**
2. EU Rice Trade
3. EU Rice Market
4. TRQ rice R.1273/2011 (R. 2017/1958 – Final use in 2017)

# Global Rice Balance: positive outlook in 2017/18

Source: FAO RMM December 2017

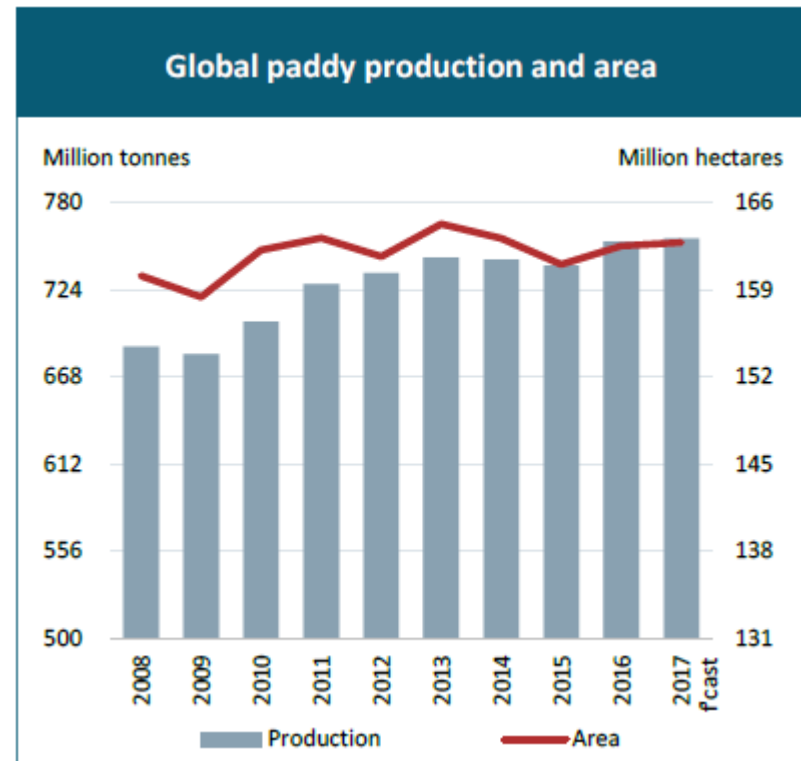
- **Production: 502.2 Mio t + 0.2%**
- **Use: 503.5 Mio t +1.1%**
- **Trade: 45.8 Mio t -0.7%**
- **End Stocks: 170.5 Mio t +1,1%**

GLOBAL RICE MARKET SUMMARY				
	2015-16	2016-17	2017-18	2017-18/ 2016-17
		est.	f'cast	var.
	<i>million tonnes, milled eq.</i>			%
Production	491.0	501.2	502.2	0.2
Supply	703.8	712.0	718.4	0.9
Utilization	492.5	497.9	503.5	1.1
Food use	395.6	400.9	406.7	1.4
Feed use	18.2	17.8	17.5	-1.7
Other uses	78.7	79.2	79.4	0.1
Trade <sup>1/</sup>	41.5	46.2	45.8	-0.7
Ending stocks <sup>2/</sup>	167.1	168.6	170.5	1.1

# Global paddy production and area in 2017/18

Source: FAO RMM December 2017

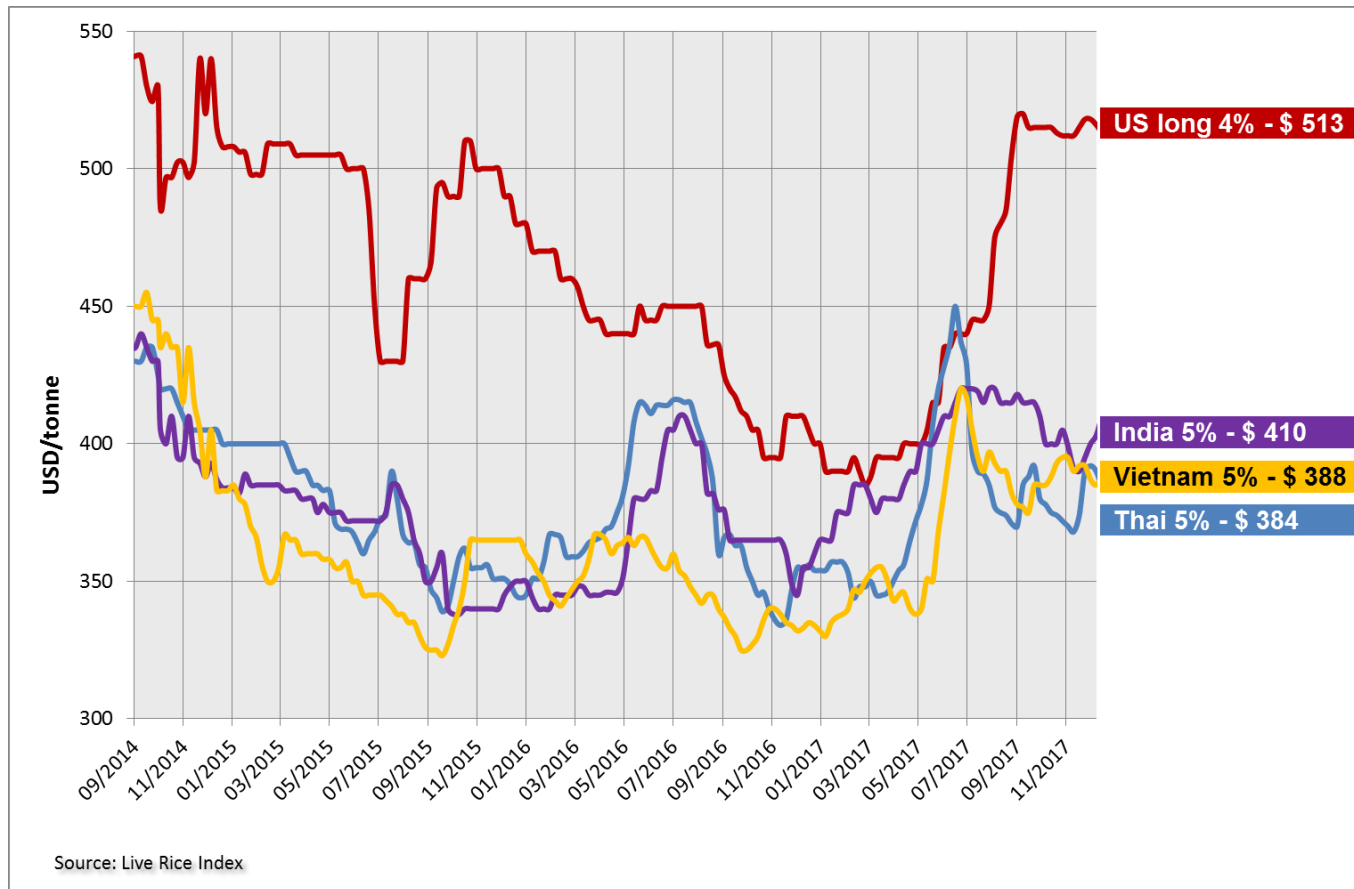
- **Production: 756.7 mio t**
- **Area: 164 mio ha**





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# International Rice Prices



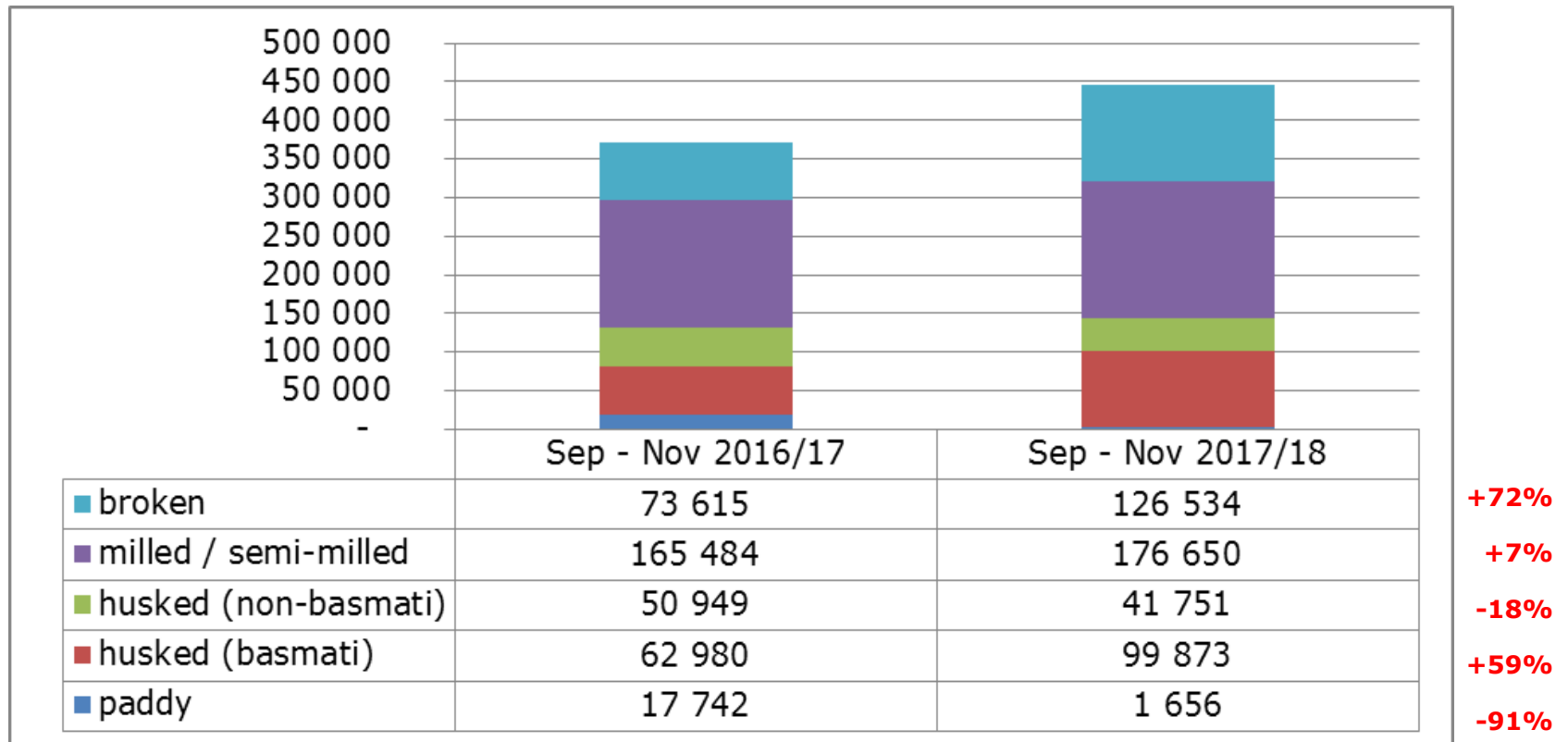


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# Total EU Rice Imports: Up + 8% in 2017/18

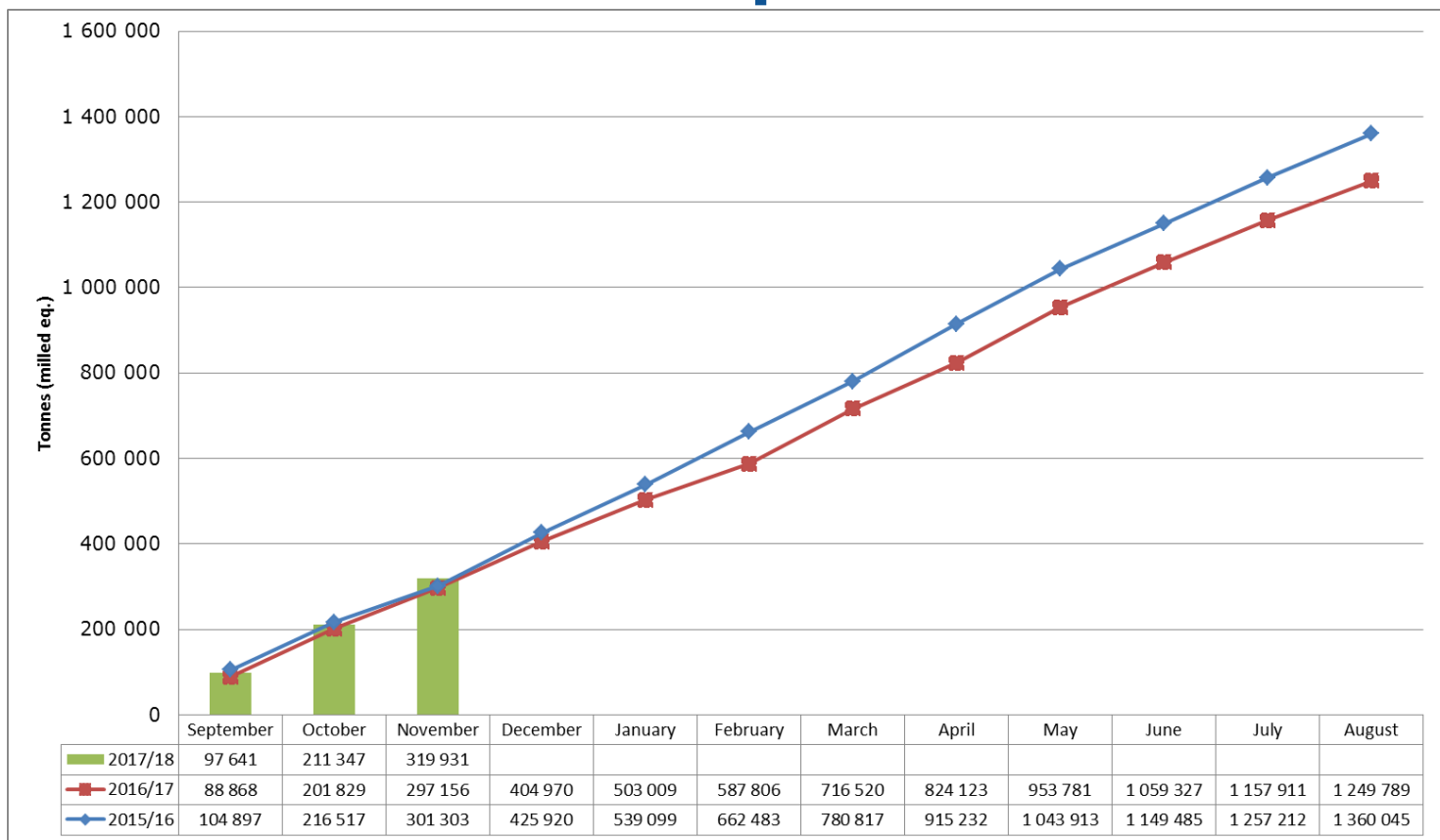
## Sep-Nov'17: $\approx 0,3$ Mio t (mill eq., excl broken)





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# Total EU Rice Imports Sep – Nov 2017: + 8 % vs Sep - Nov 2016



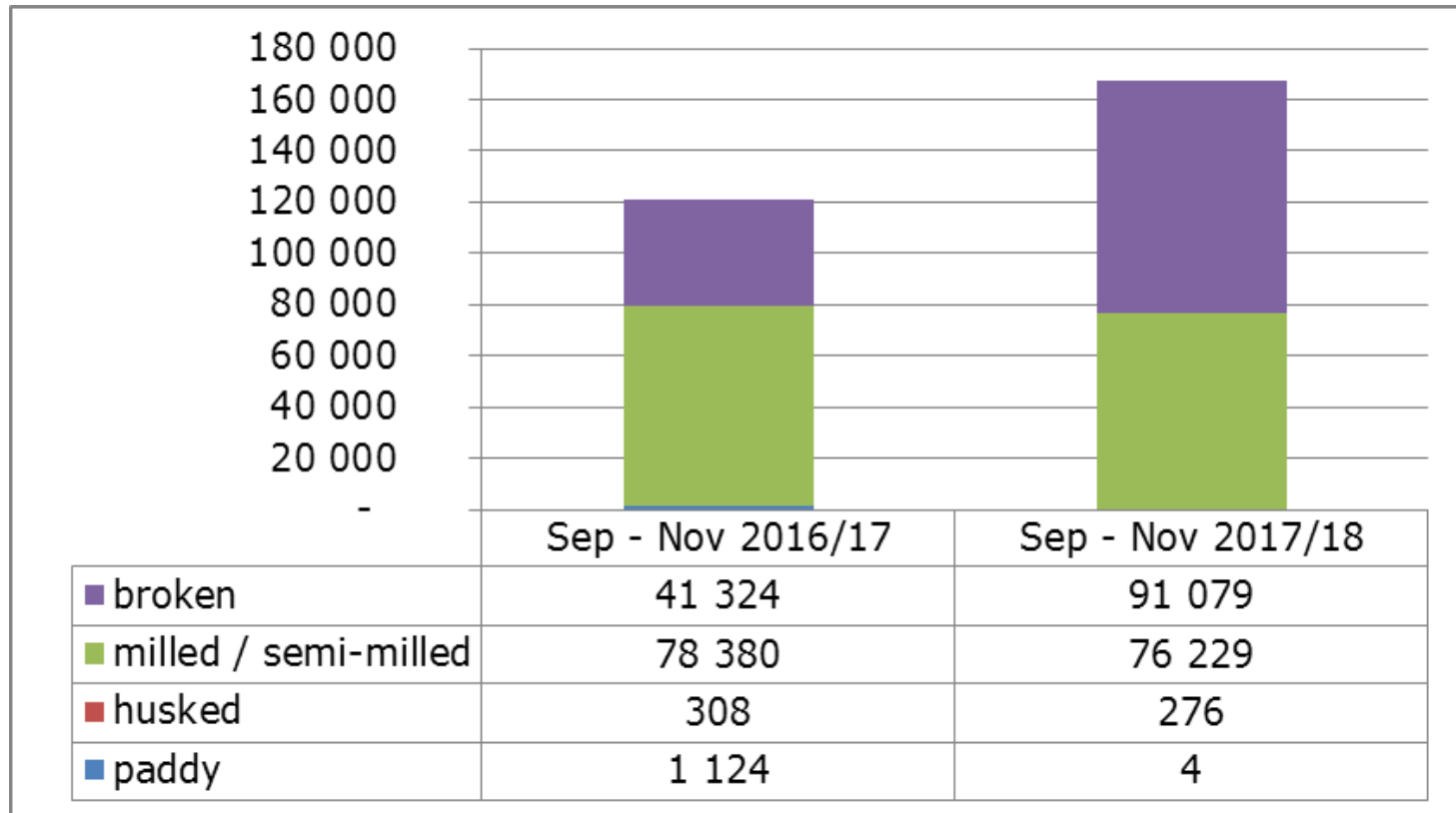




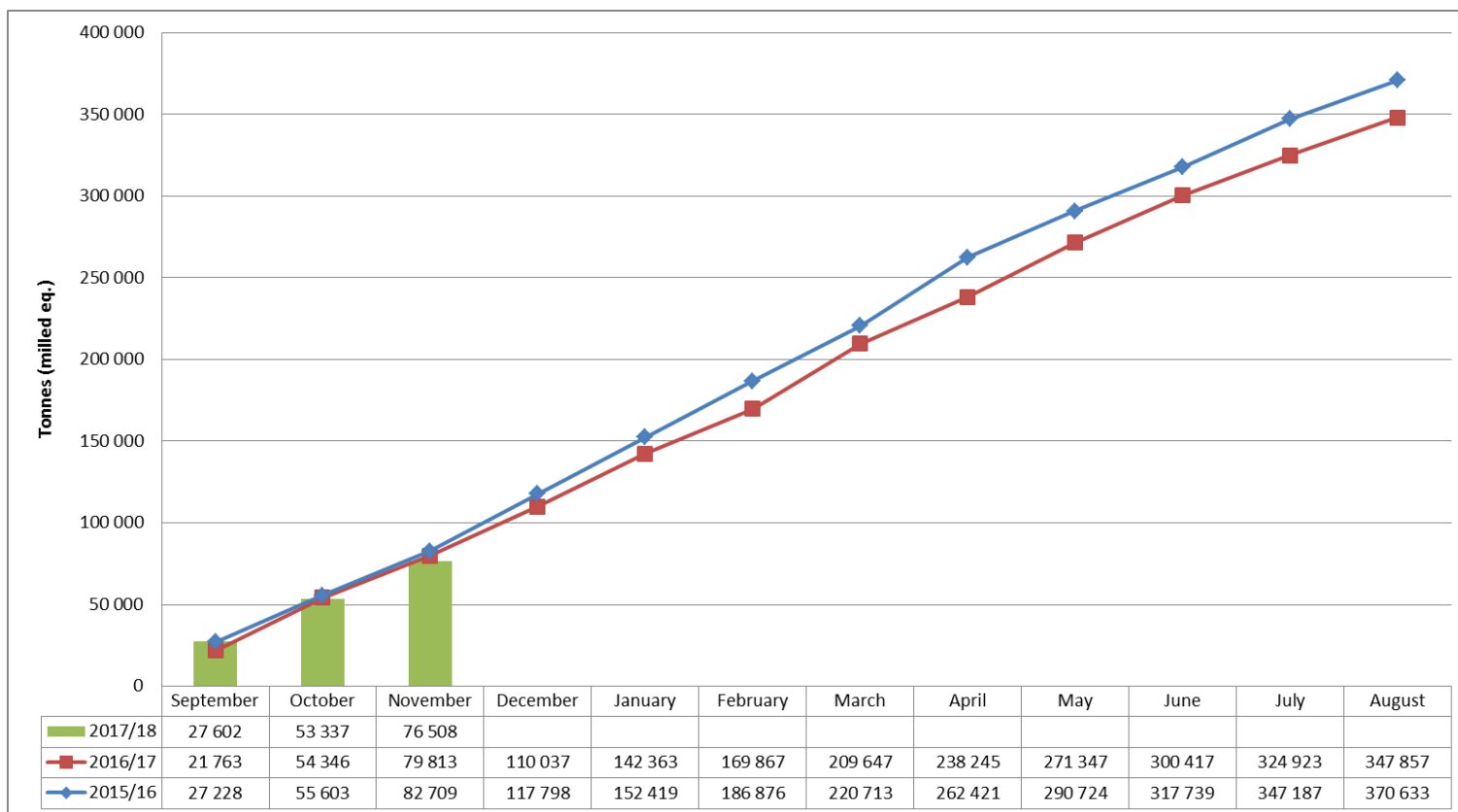
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# EBA rice imports: Down - 4% in 2017/18

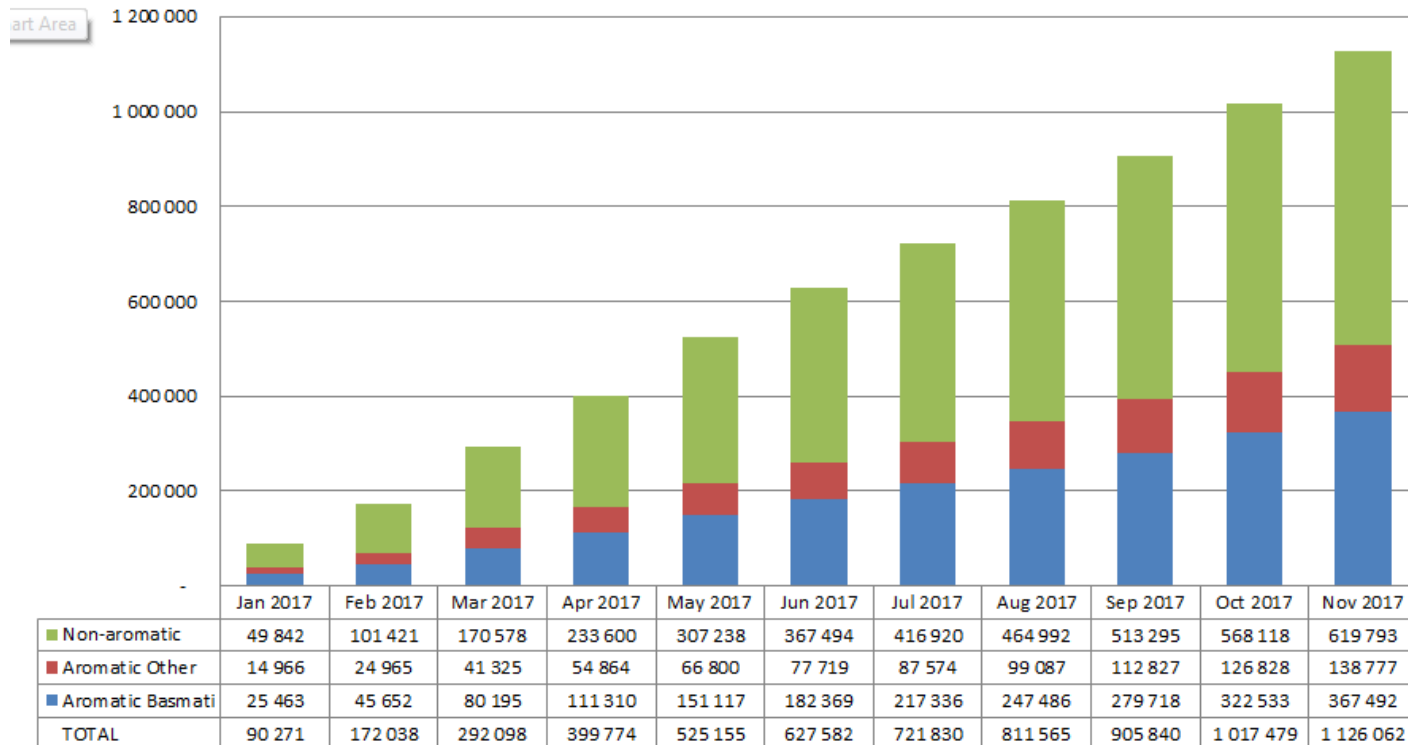
## Sep-Nov'17: 76 508 tonnes (mill eq, excl. broken)



## EBA Rice Imports Sep – Nov 2017: - 4 % vs Sep – Nov 2016



# Total Husked & Milled rice imports (CN 1006 20 & 30) January 2017 – November 2017

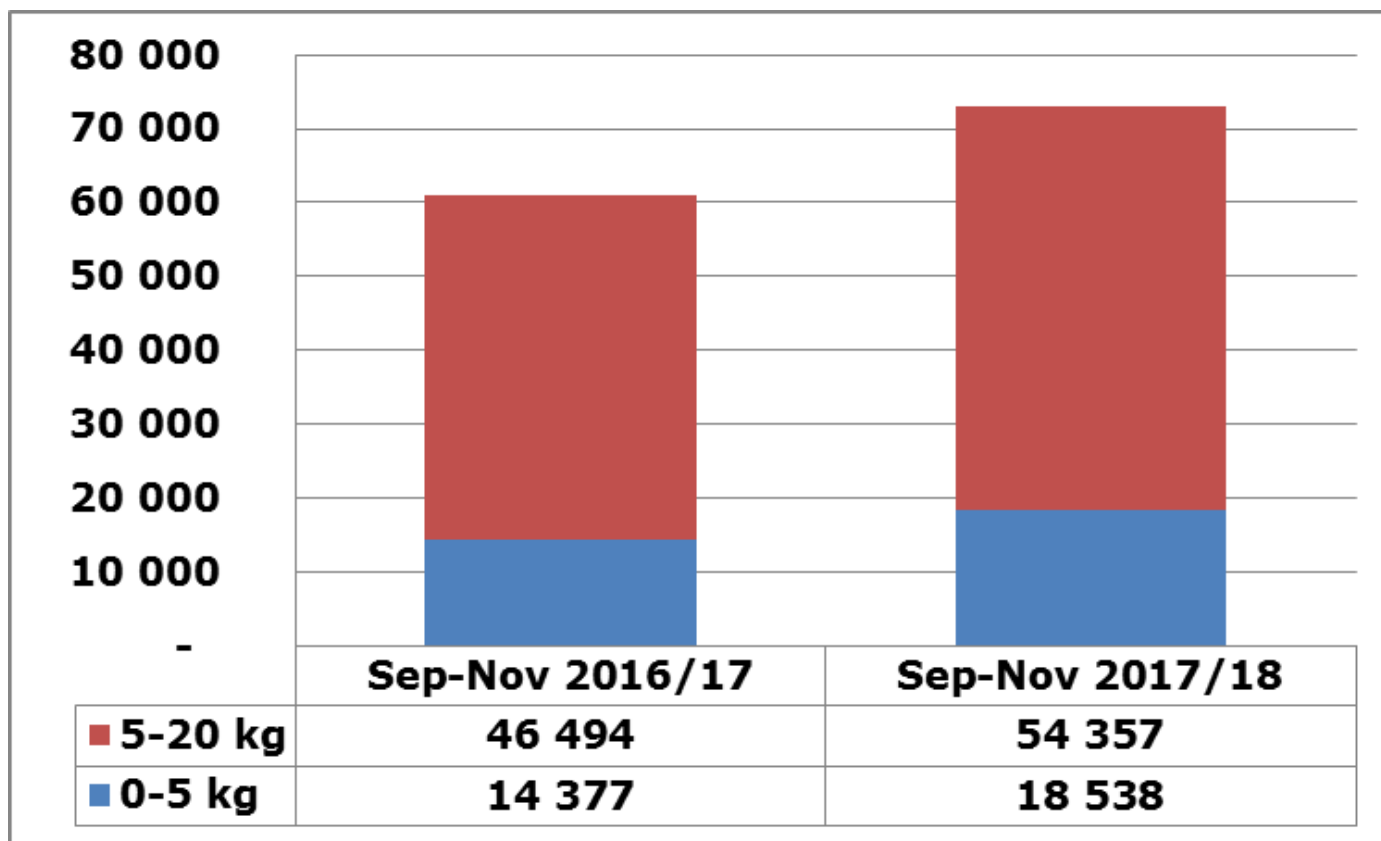




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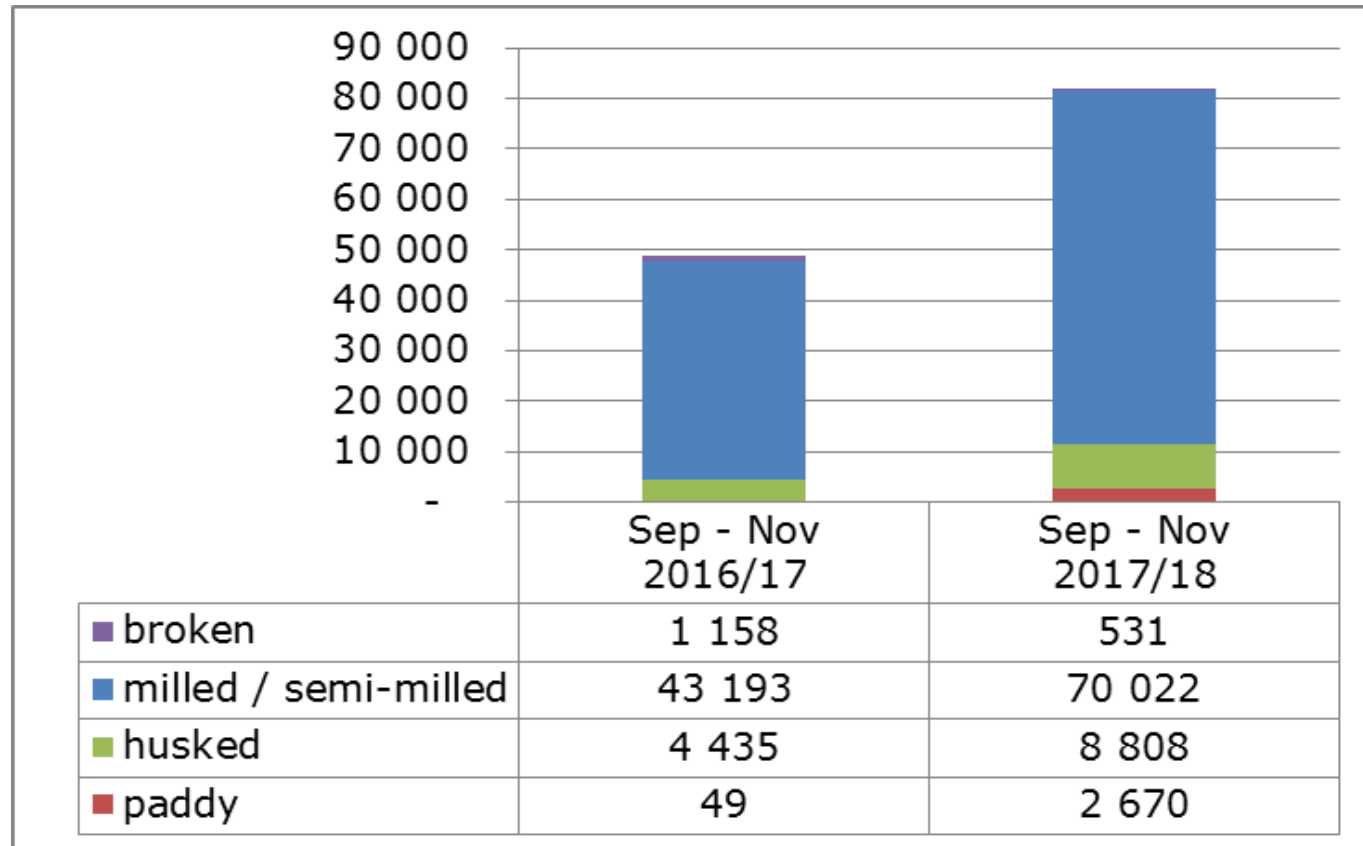
## EU Rice Imports – Small packages (< 20kg)

*First 3 months MY 2017/18: +20% vs 2016/17*

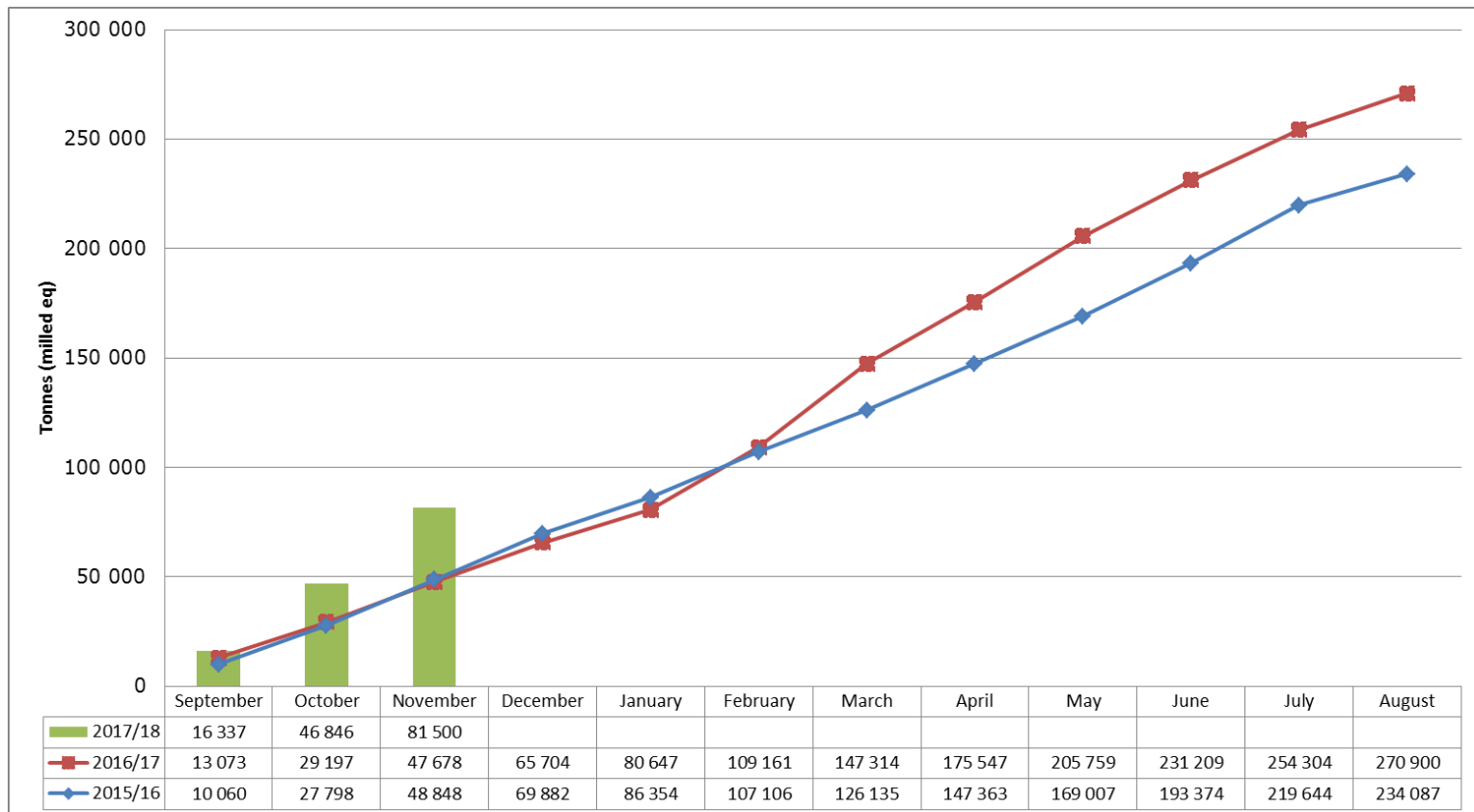


# Total EU rice exports: Up +71% in 2017/18

## Sep-Nov'17: 81 500 t (milled eq, excl. broken)



## Total Rice Exports Sep - Nov 2017: + 71 % vs Sep - Nov 2016





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## EU Rice Balance Sheet – December 2017

'000 metric tonnes (in milled equivalent)

	2015/16			2016/17 est			2017/18 fcst		
	Japonica	Indica	TOTAL	Japonica	Indica	TOTAL	Japonica	Indica	TOTAL
Beginning stocks									
<i>Private</i>	157	283	441	270	272	542	317	286	603
<i>Intervention</i>	-	-	-	-	-	-	-	-	-
Total beginning stocks	157	283	441	270	272	542	317	286	603
Usable production	1 322	449	1 772	1 410	424	1 834	1 295	476	1 770
<i>Area ('000 ha)</i>	334	102	436	348	92	440	327	104	431
<i>Agronomic yield (t/ha, on paddy basis)</i>	6.8	7.4	6.9	6.8	7.8	7.0	6.6	7.6	6.9
<i>Milling yield (%)</i>	58%	60%	59%	59%	59%	59%	60%	60%	60%
Imports (from third countries)	125	1 235	1 360	116	1 134	1 250	110	1 130	1 240
<b>TOTAL SUPPLY</b>	<b>1 605</b>	<b>1 967</b>	<b>3 572</b>	<b>1 796</b>	<b>1 830</b>	<b>3 626</b>	<b>1 722</b>	<b>1 892</b>	<b>3 613</b>
Domestic uses									
<i>Human consumption / Industrial uses / Animal feed</i>	1 092	1 655	2 747	1 199	1 502	2 702	1 125	1 561	2 686
<i>Seed ***</i>	39	10	49	41	9	50	39	10	49
Total domestic uses	1 131	1 665	2 795	1 241	1 511	2 752	1 164	1 571	2 735
Exports (to third countries)	204	30	235	238	33	271	240	35	275
<b>TOTAL USE</b>	<b>1 335</b>	<b>1 695</b>	<b>3 030</b>	<b>1 479</b>	<b>1 544</b>	<b>3 023</b>	<b>1 404</b>	<b>1 606</b>	<b>3 010</b>
Final stocks ****									
<i>Private</i>	270	272	542	317	286	603	317	286	603
<i>Intervention</i>	-	-	-	-	-	-	-	-	-
Total final stocks	270	272	542	317	286	603	317	286	603
Change in stocks	113	-11	102	47	14	61	0	0	0
Change in public stocks	-	-	-	-	-	-	-	-	-



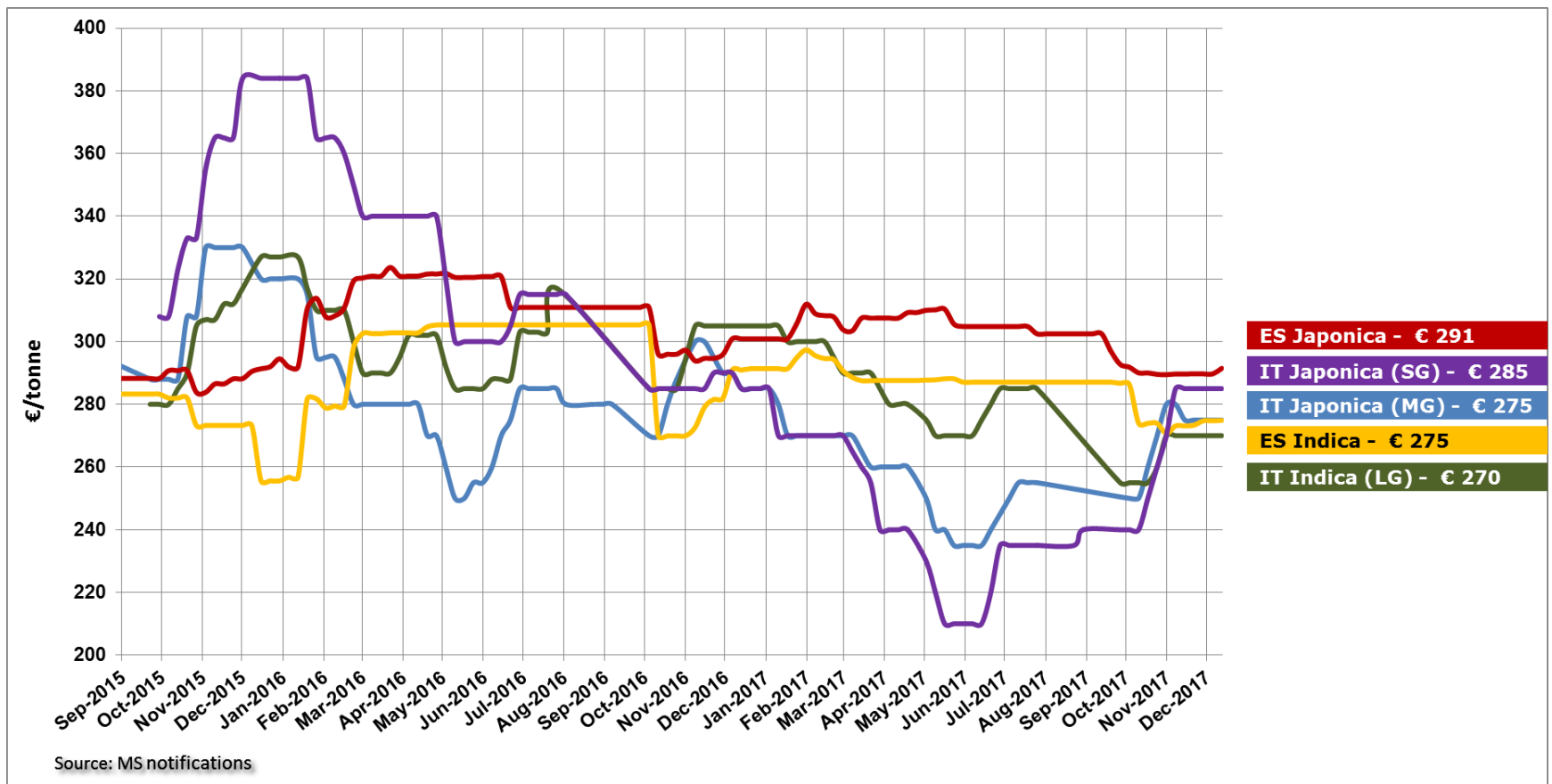


## **Rice crop and stock declarations**

- *Rice crop declaration - ISAMM form 405 (producing Member States)*
- *Rice stock declaration - ISAMM form 406 (all Member States)*

*to be communicated on 15 January 2018  
at the latest (Reg 2017/1185, annex III.1)*

# EU Rice Market Prices

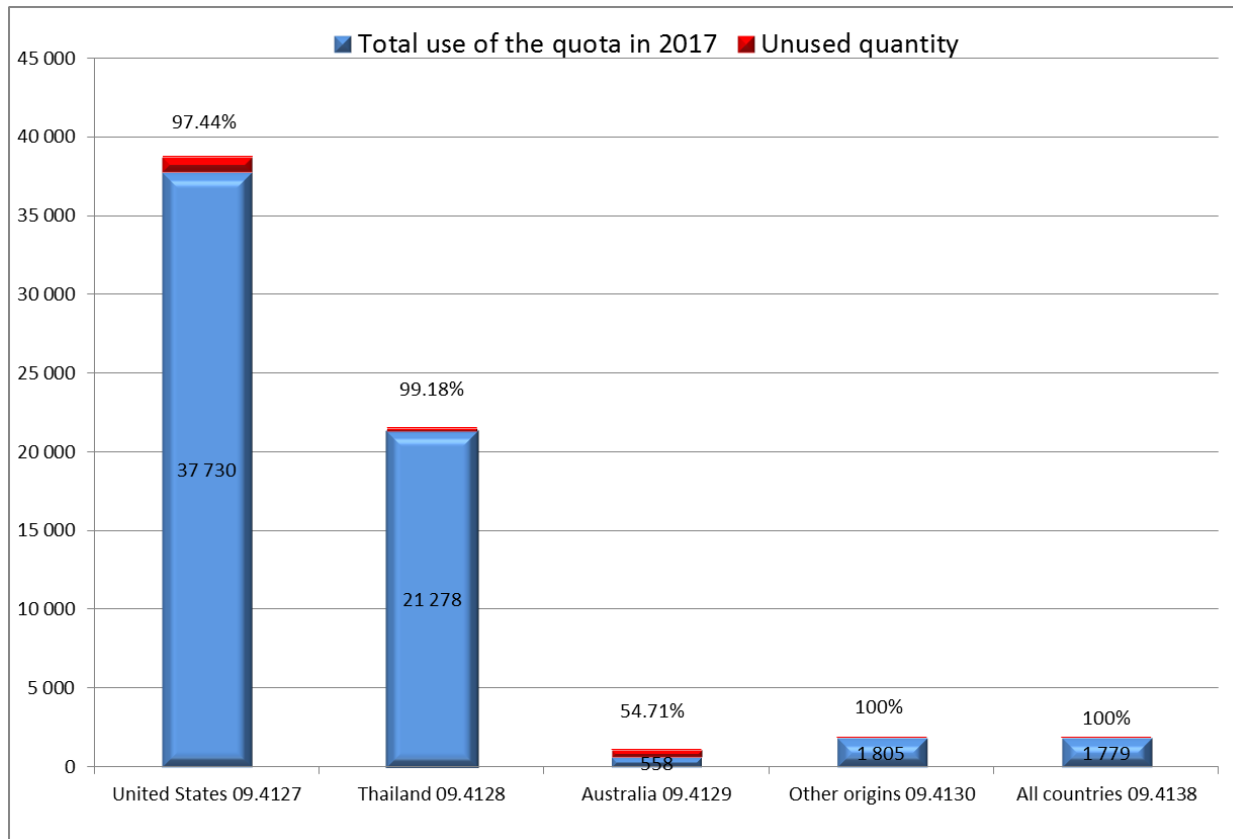




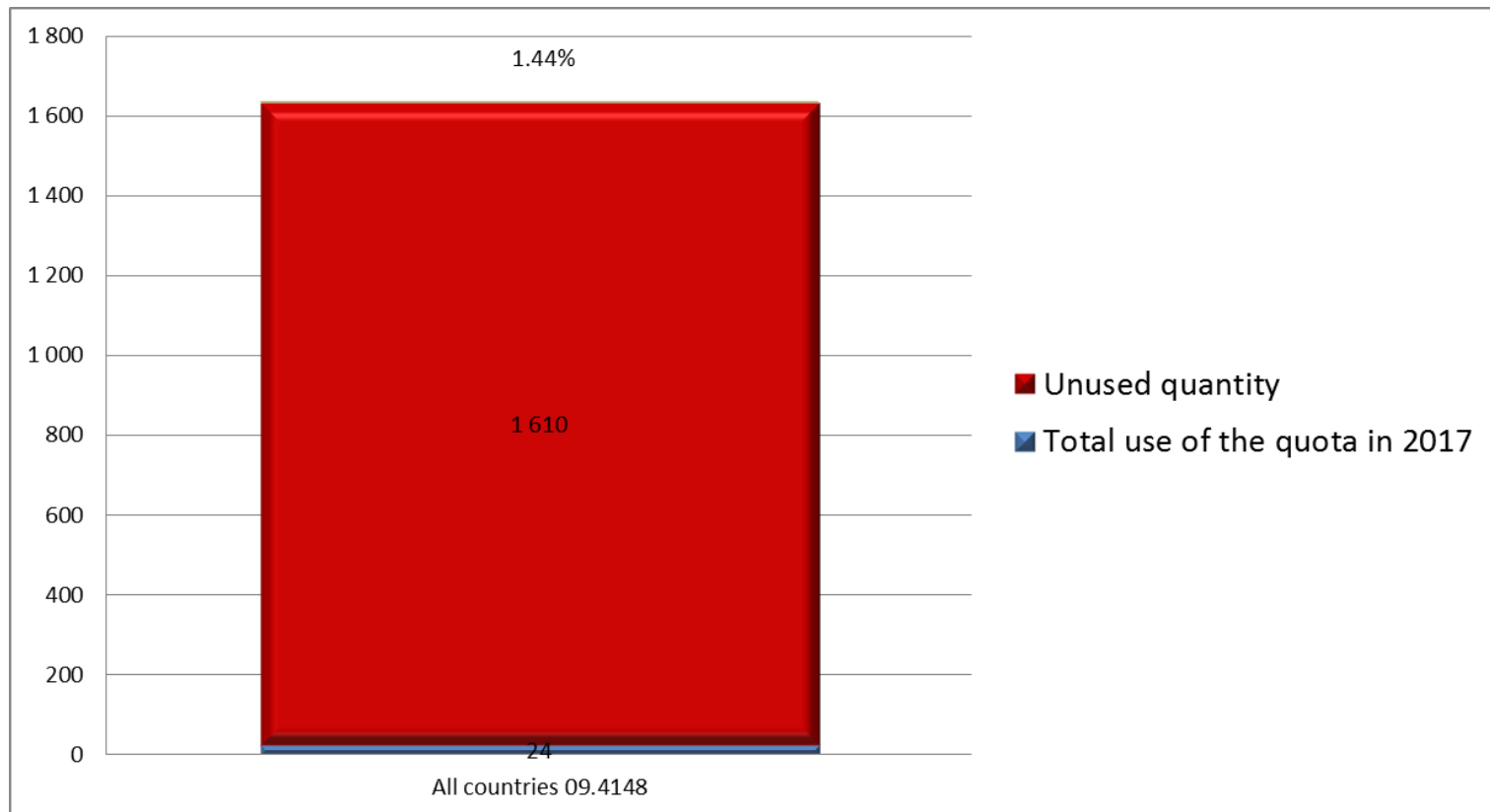
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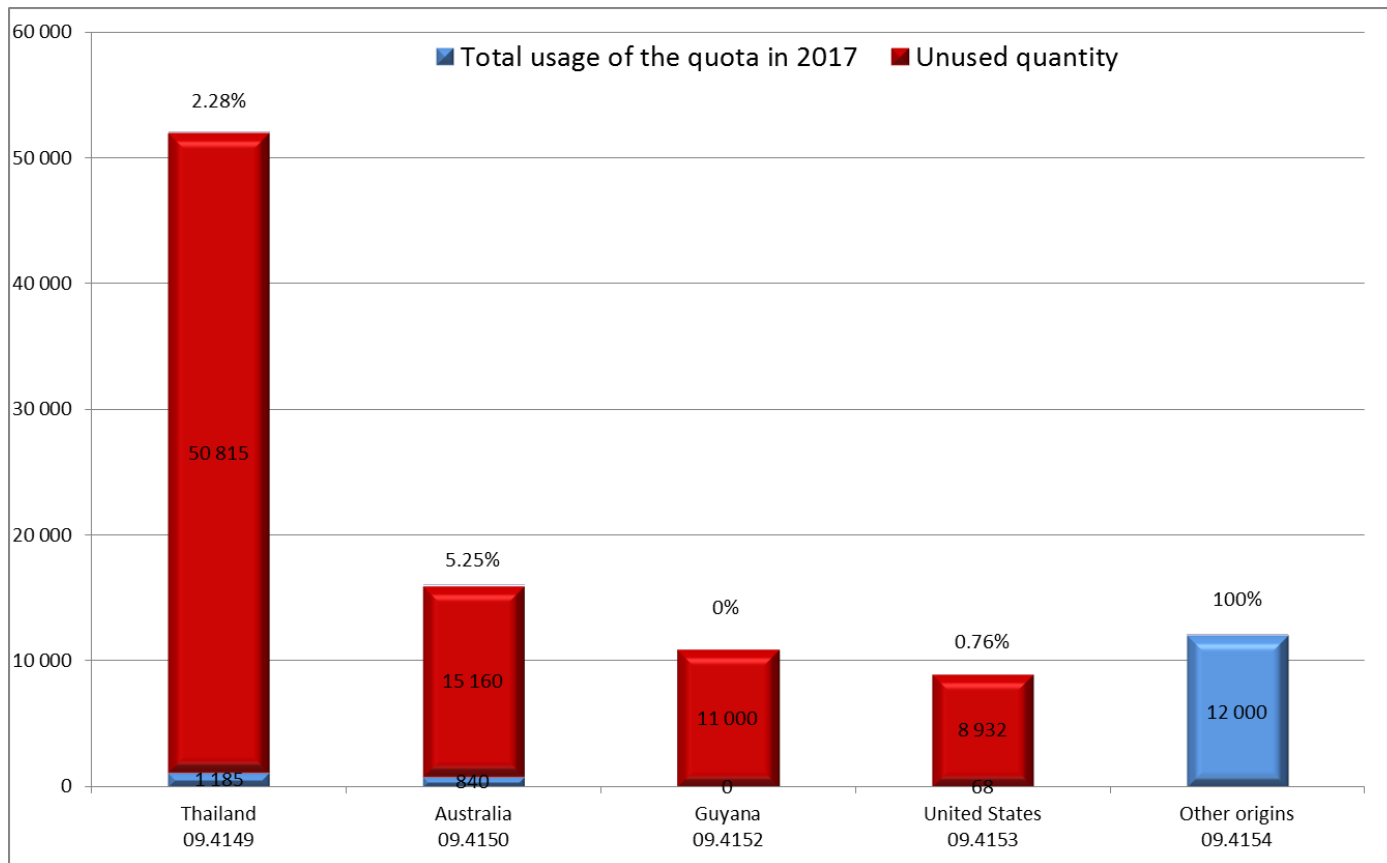
# TRQ Article 1(1)(a) - 2017 take up (63 000 tonnes of milled rice duty-free)



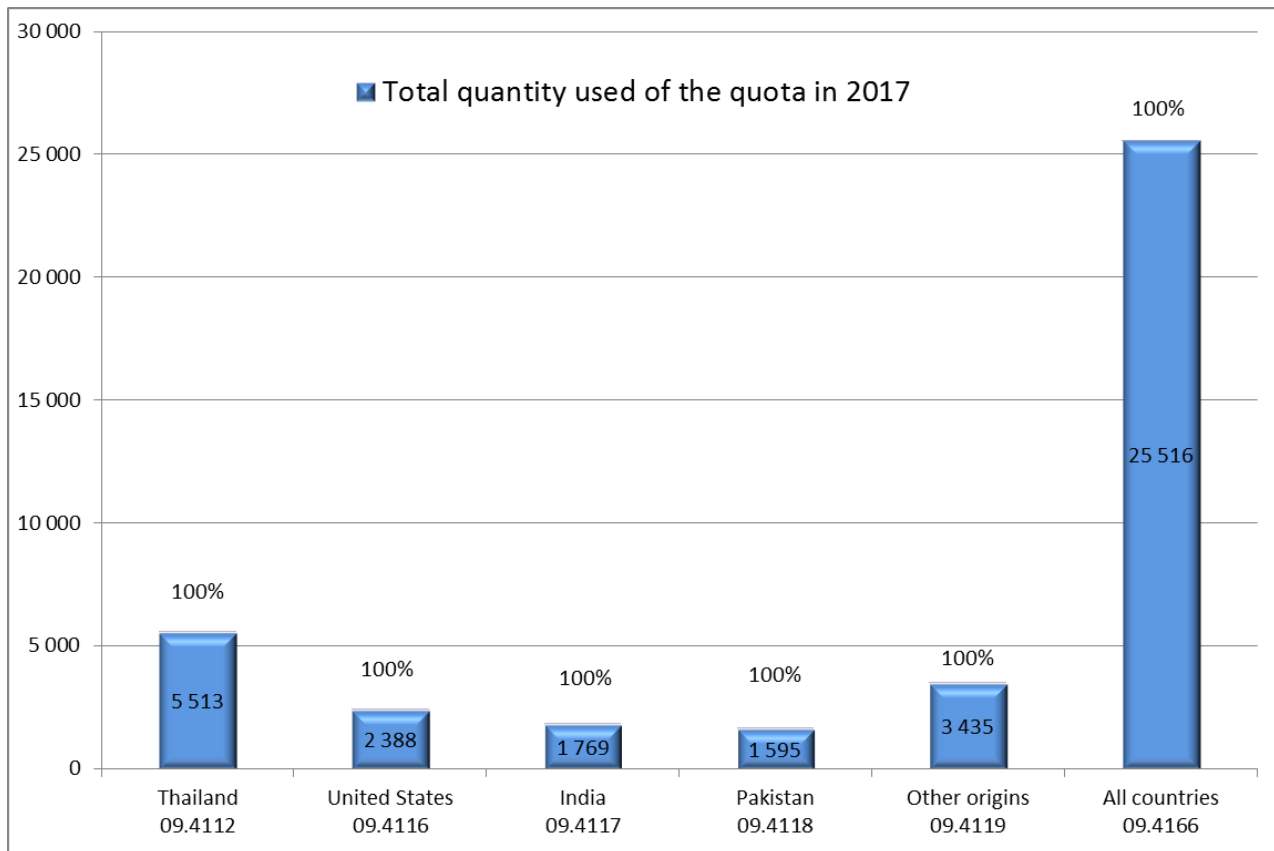
# TRQ Article 1(1)(b) - 2017 take up (1 634 tonnes of husked rice reduced duty)



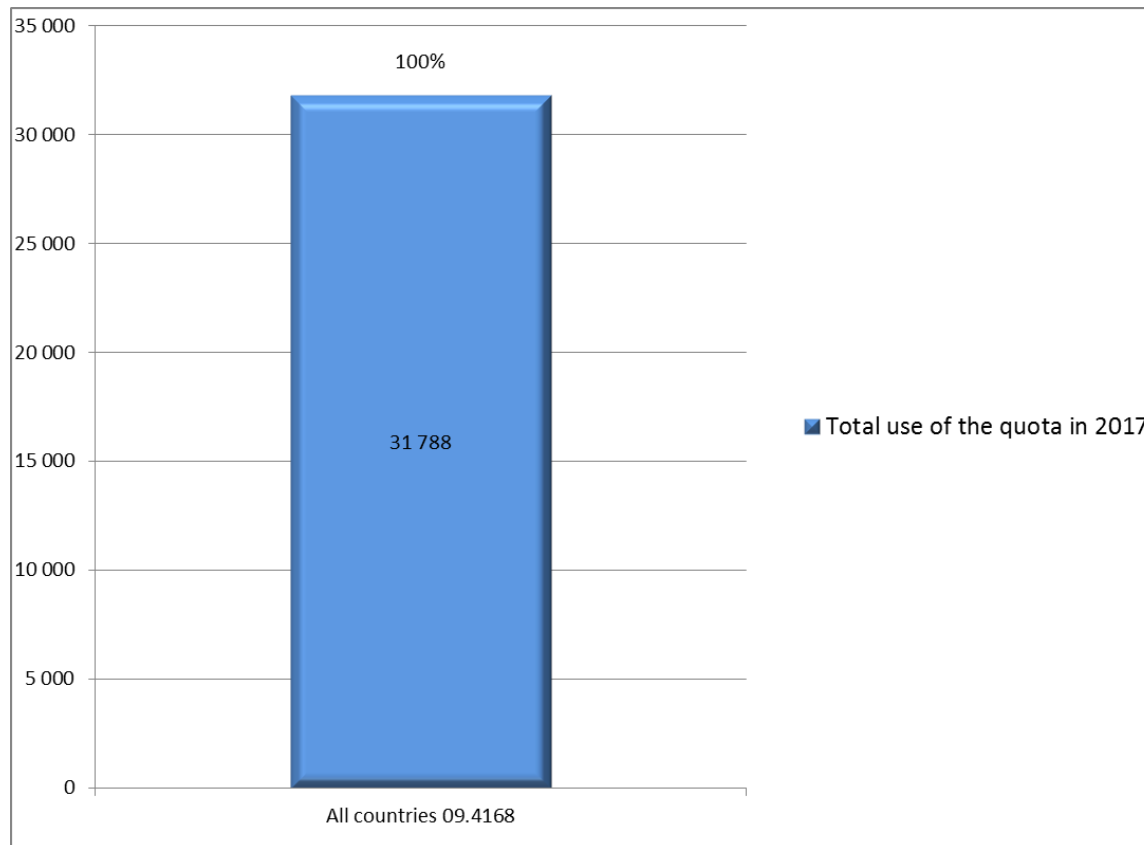
# TRQ Article 1(1)(c) - 2017 take up (100 000 tonnes of broken rice reduced duty)



# TRQ Article 1(1)(d) - 2017 take up (40 216 tonnes of milled rice duty-free)



# TRQ Article 1(1)(e) - 2017 take up (31 788 tonnes of broken rice duty-free)





## Conclusions

- **Stocks levels high at beginning of new MY.**
- **So far (slightly) higher imports and (much) higher exports compared to last year.**
- **Member States notifications on stocks and production needed by 15 January 2018.**



**Thank you for your attention!**

**Presentation & Balance sheet  
available at:**

**[http://ec.europa.eu/agriculture/cereals/index\\_en.htm](http://ec.europa.eu/agriculture/cereals/index_en.htm)**