

FRENCH WHEAT : AN ORGANISED EXPORT CHAIN

France is the third wheat's exportators in the world thanks to an important production. Each year, wheat is sown on 5 million hectares (Mha) and produces around 37 million tons (Mt) of grain which make it the first grain grown.

Almost all the production (35 Mt) is collected through cooperatives – a regroupment of farmers - (70%) or merchants (30%). The State never interferes during this process.

On this volume, about half the production is used by local industries like millers (≈ 4 Mt), starchs (≈ 3 Mt), feed manufacturers (≈ 5 Mt) and biofuels (1,6 Mt). The remained volume is intended for export (≈ 19 Mt) (Figure 1).

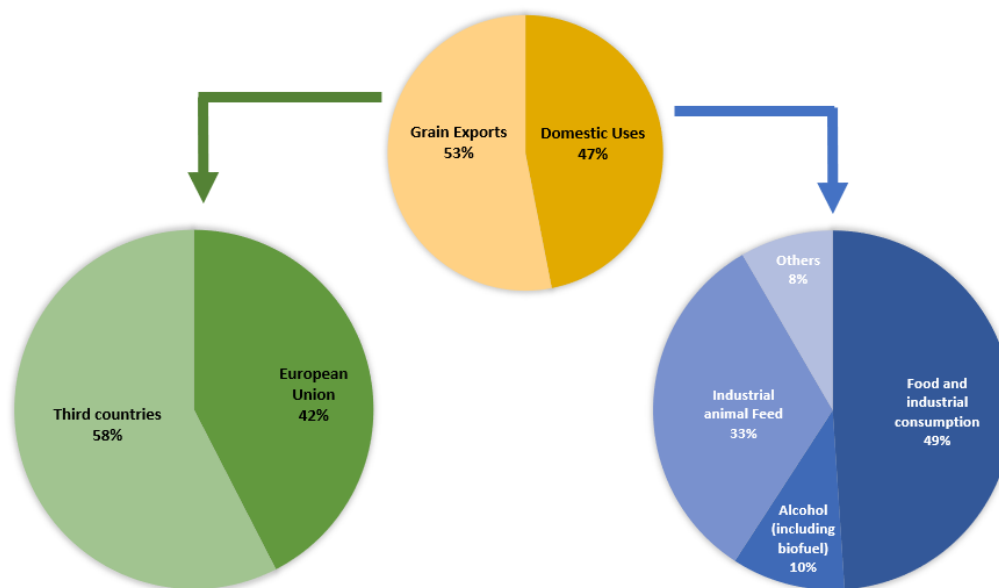


Figure 1: French wheat uses (%)

Source : FranceAgriMer, France Export Céréales, 2017

Consequently, wheat exports are essential for France both in terms of ending stocks and for commercial balance. That is why all operators in agricultural sector are mobilized to best meet customers needs.

Collect and store production

When the farmers harvest, in July, most of the time they bring their production to storage silos which belong to one of the 184 cooperatives or 400 merchants. Silos are spread throughout the country and have a total capacity of 60 Mt (including 9 Mt in French ports). At this place, grains are analysed, screened and distributed by lot according to their quality. Good conditions storages allows France to export all along the year a constant quality.

Transport to customers

Of the 19 Mt exports, about 11 Mt go to third countries (outside the European Union), and 8 Mt go to intra UE trade. For the last one, cooperatives and merchants often send directly the wheat to their customers by trucks, trains or boats.

But to export to third countries, first, wheat has to join the French ports (Figure 2). The 12 maritime port sites which export grain, located on the Mediterranean, the Atlantic, and the Channel, are all well connected to road, rail and river networks. From fields to ports, distances are quite short (around 250 km around the port) and the combined routing capacity of the three transport modes (river for 10 % of the grain, rail for 20 % and road for 70 %) allow the most important ports to offer its customers a real choice in terms of grain origins, with reliable transport solutions, at a very reasonable cost.

Most of the French Port terminals are well equipped with:

- storage capacities.
- high capacity cranes for loading all kinds of vessels (up to 120 000 t. for « La Pallice »);
- vessels of different sizes, from « handysize » vessels (25 000 to 35 000 t. capacity / for grain export to North and West Africa) to « Panamax » (60 000 t. capacity / for wheat export to Egypt under GASC contracts).
- laboratories, that guarantee that the product loaded in the ports complies with the commercial contract terms (proteins, PS, humidity...) and the phytosanitary rules in the country of destination.

	Grain export potential (Mt)	Total Storage Capacity (*1000t)	Max. loading of the vessels (t.)	Ship loading rate (t/h)	Water depth (m)
Rouen	6 to 8	1 300	45 000	9 900	10,3
La Rochelle (la Pallice)	4 to 5	470	120 000	2 500	13,5
Bordeaux	1 to 1,5	405	40 000	1 200	9-9,5
Nantes /St Nazaire	1 to 1,5	430	60 000	1 200	9-13,5
Dunkerque	1 to 1,2	330	90 000	1 400	13,75
Marseille /Fos sur Mer	0,5-1	70		1 000	12,8-18
Port la Nouvelle	0,6-0,8	75	14 000	800	8
Bayonne	0,5-0,8	90	20 000	800	9 to 10
Sète	0,2	77	20 000	800	10,4

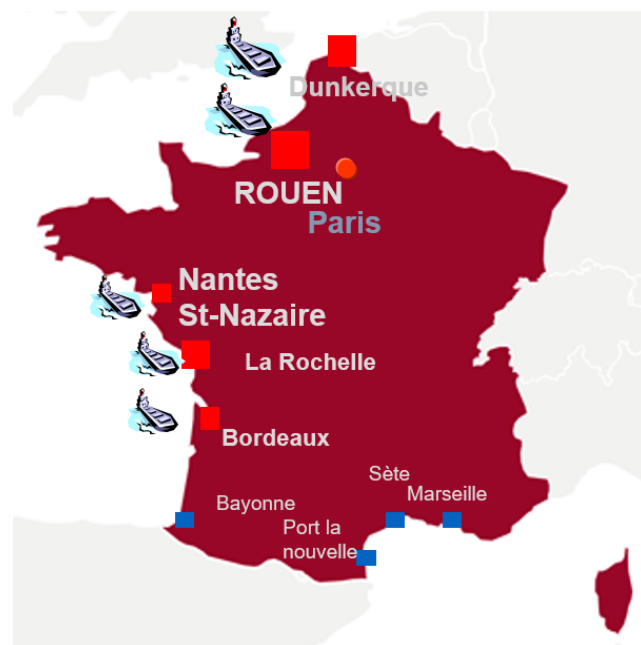


Figure 2: **Organisation of French ports**
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