Majskörden i Europa torkar bort

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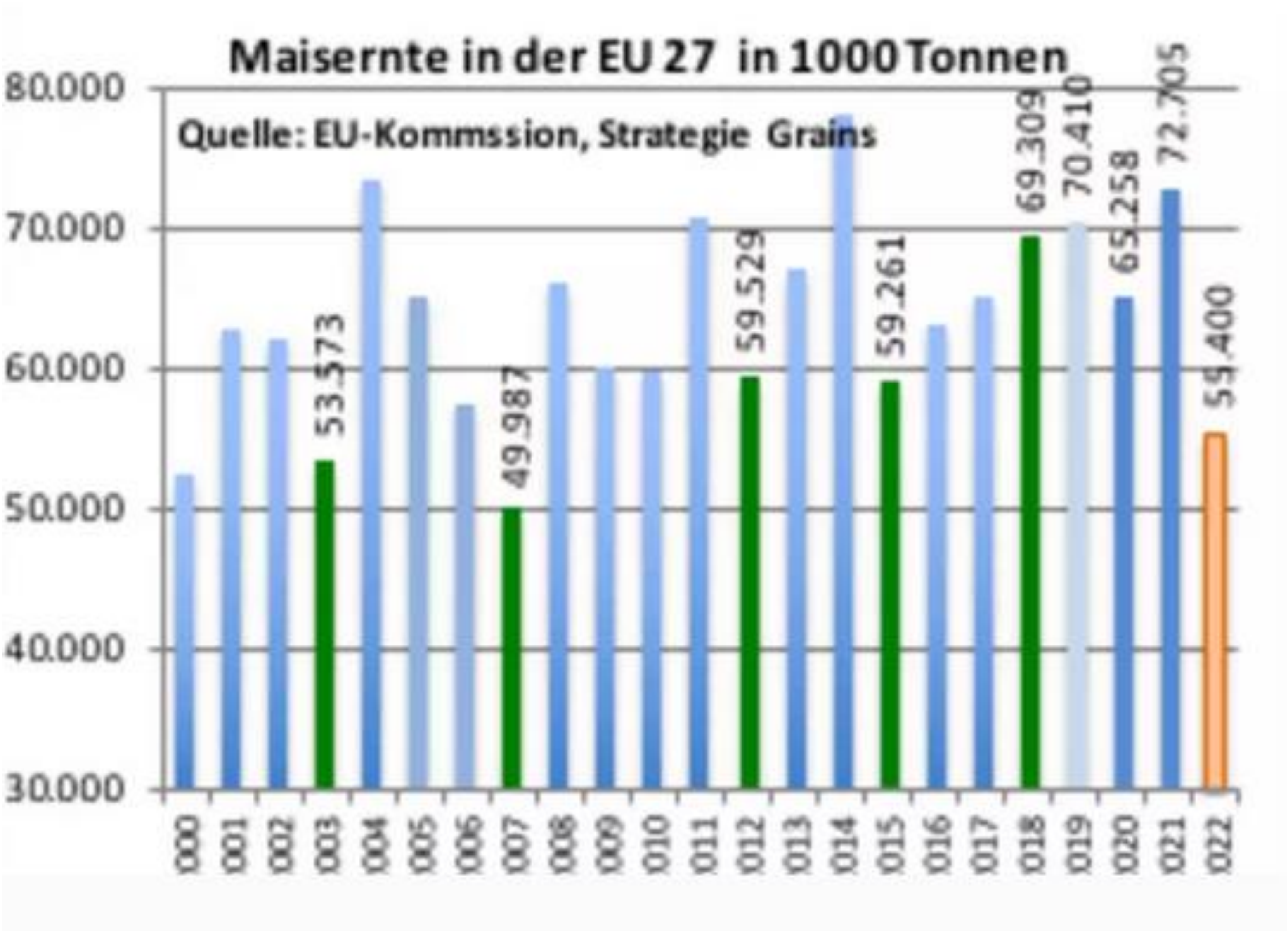
Maisernte verbrennt auf den Feldern - Noternte und Futterkrise

© stock.adobe.com/Regina Die Aussichten für die Körnermaisernte 2022 in ganz Europa haben sich drastisch verschlechtert, sagten die Analysten von Strategie Grains in ihrem aktuellen Getreidebericht. Fazit der Analysten ist: Das wird die kleinste Ernte seit 2007.



Maisernte in der EU 27 in 1000 Tonnen
Quelle: EU-Kommssion, Strategie Grains
80.000
70.000
60.000
50.000
40.000
30.000
53.573
49.987
59.529
59.261
69.309
70.410
65.258
72.705
55.400
000
001
002
003
004
005
006
007
008
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022

Produktionskostnad, €/t

Beräkningsgrund: Gödsel 750 euro, vete 300 €/t/4,1 t/ha, raps 660 €/t/1,55 t/ha; litet minus för båda

- Vårvete 2023: 308 €/t /4,21 t/ha
- Raps 2023: 674 €/t/1,58 t/ha

Största kostnaderna: gödsel (30%), maskin (20%) och åker (30 %)

Källa: NSL/Krister Hildén 14.7.2022, LIR gårdarnas resultat

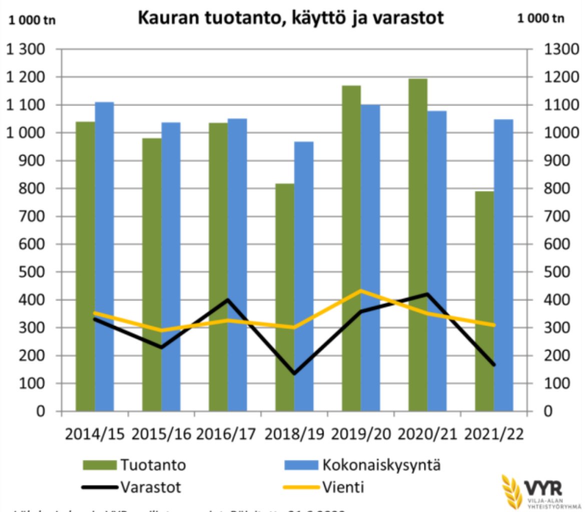
Skördeutsikterna i Finland

- Lukes skördeprognos (situationen 15.8.) publiceras fre 19.8. 2022 (tidigare år publicerades prognosen i mitten på juli)
- VYR marknadsarbetsgrupp 24.8. 2022, första prognosen 2022/23
- Kalkyl baserad på 10 års medelskörd:

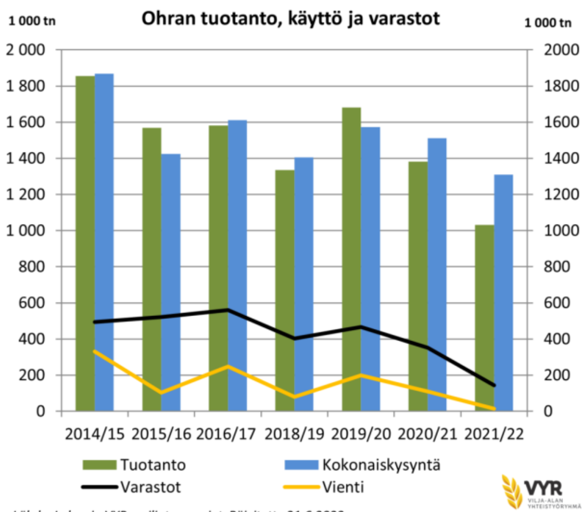
2022/23	Vete	Råg	Korn	Havre
Produktion, 1000 t	889	64	1325	1139
Areal, 1000 ha	231	20	363	335
Ha-skörd, ton/ha*	3,85	3,2	3,65	3,4
Inhemsk användning, 1000 t, 2021/22	700	106	1294	739
Skillnad (produktion-inhemsk användning), 1000 t	+189	-42	+31	+400

Ingående lager av spannmål mindre än på länge

2021/22, VYR	Vete	Råg	Korn	Havre	Totalt
Ingående lager 1.7. 2021, 1000 t	210	111	351	420	1092
Lager 1.7. 2022, 1000 t	238	69	144	167	618
Skillnad, 1000 t	+28	-42	-207	-253	-474



Lähde: Luken ja VYR:n viljatasearviot. Päivitetty 21.6.2022.



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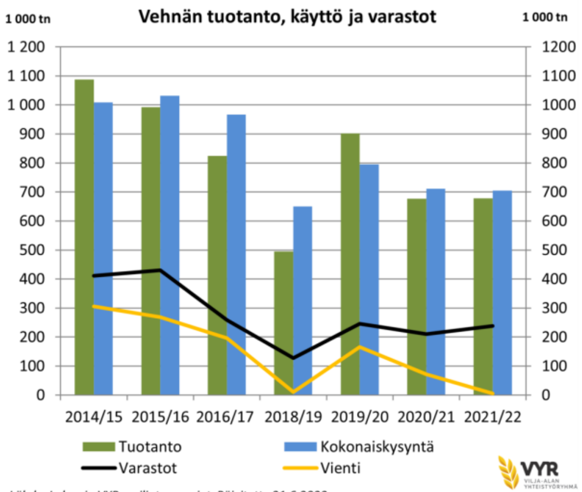

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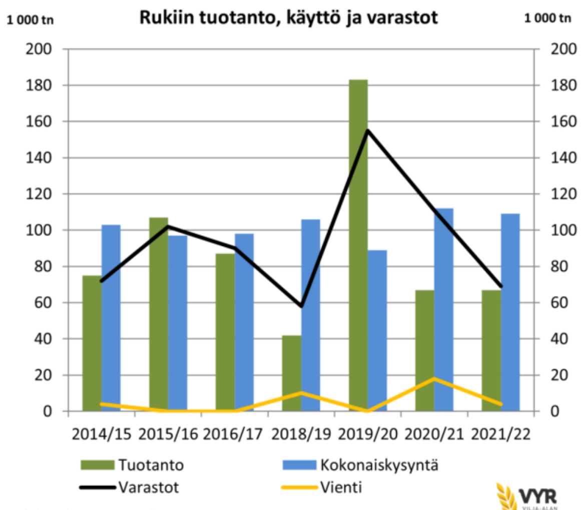
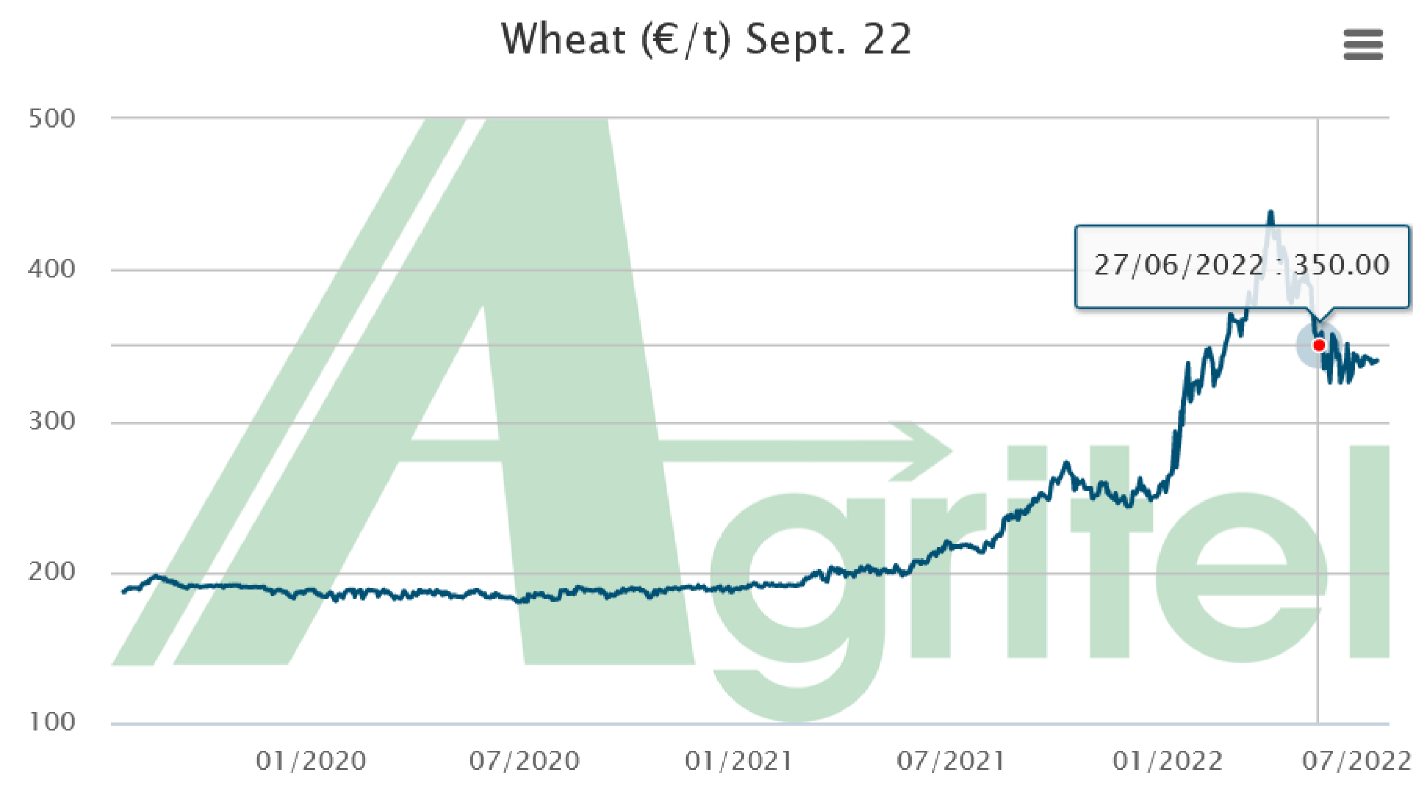


Lähde: Luken ja VYR:n viljatasearviot. Päivitetty 21.6.2022.

Priser, Avenakauppa, 16.8.2022

	Nu, €/t	2023, €/t
Raps	625	605
Livsmedelshavre, exporthamn	308	300
Foderkorn	280	-
Råg	330	330
Kvarnvete	320 (15.7.-22, 330	300
Fodervete, A-foder	310	-



16/08/2022 12:28 (GMT+1)

Wheat (€/t)		
Sept. 22	334.00	-5.75
Déc. 22	325.25	-4.25
Mars 23	323.00	-3.75
Mai 23	322.00	-3.25
Sept. 23	297.00	-2.00

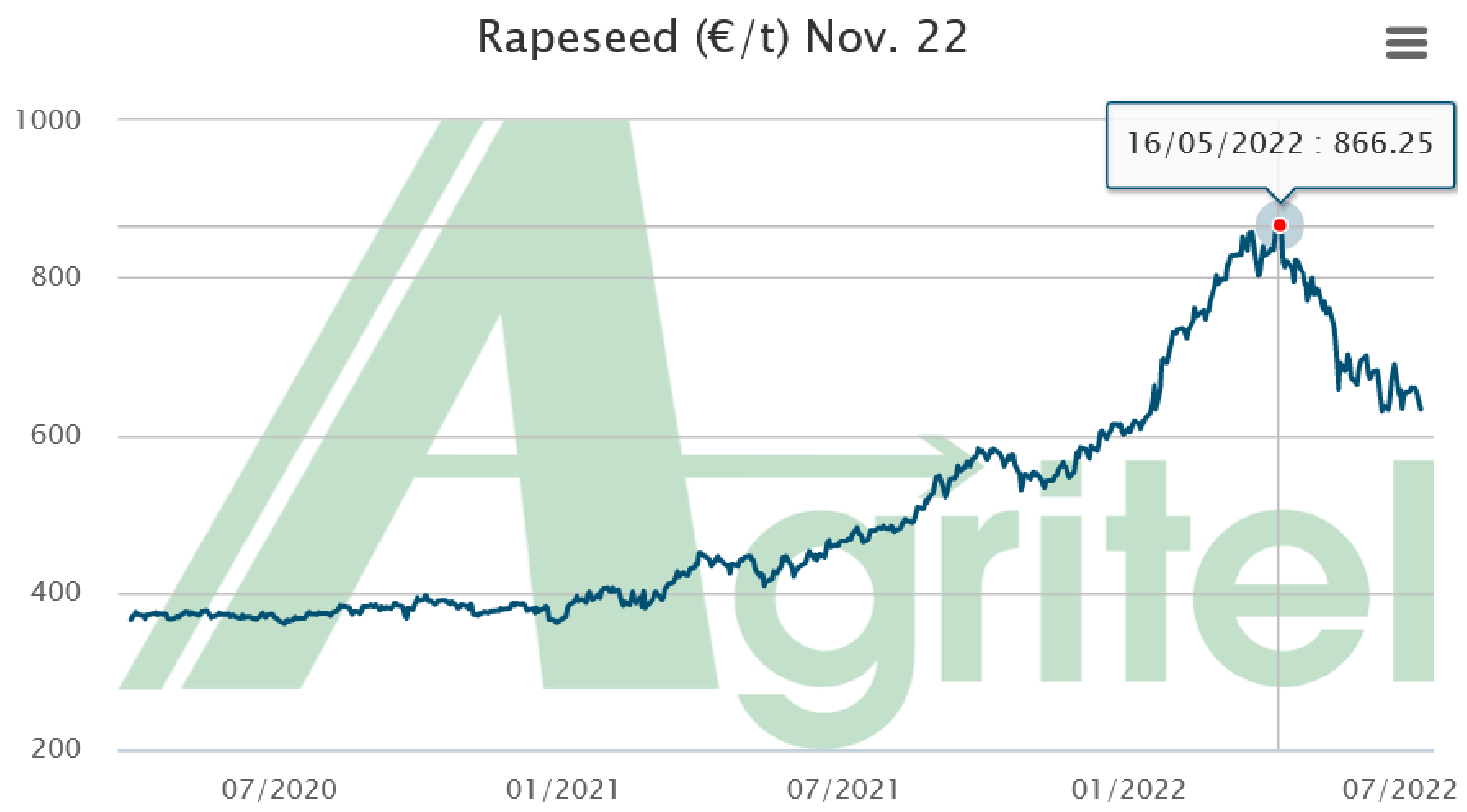
Avena

nu: 320 €/t, basis (sept-22) -14 €/t

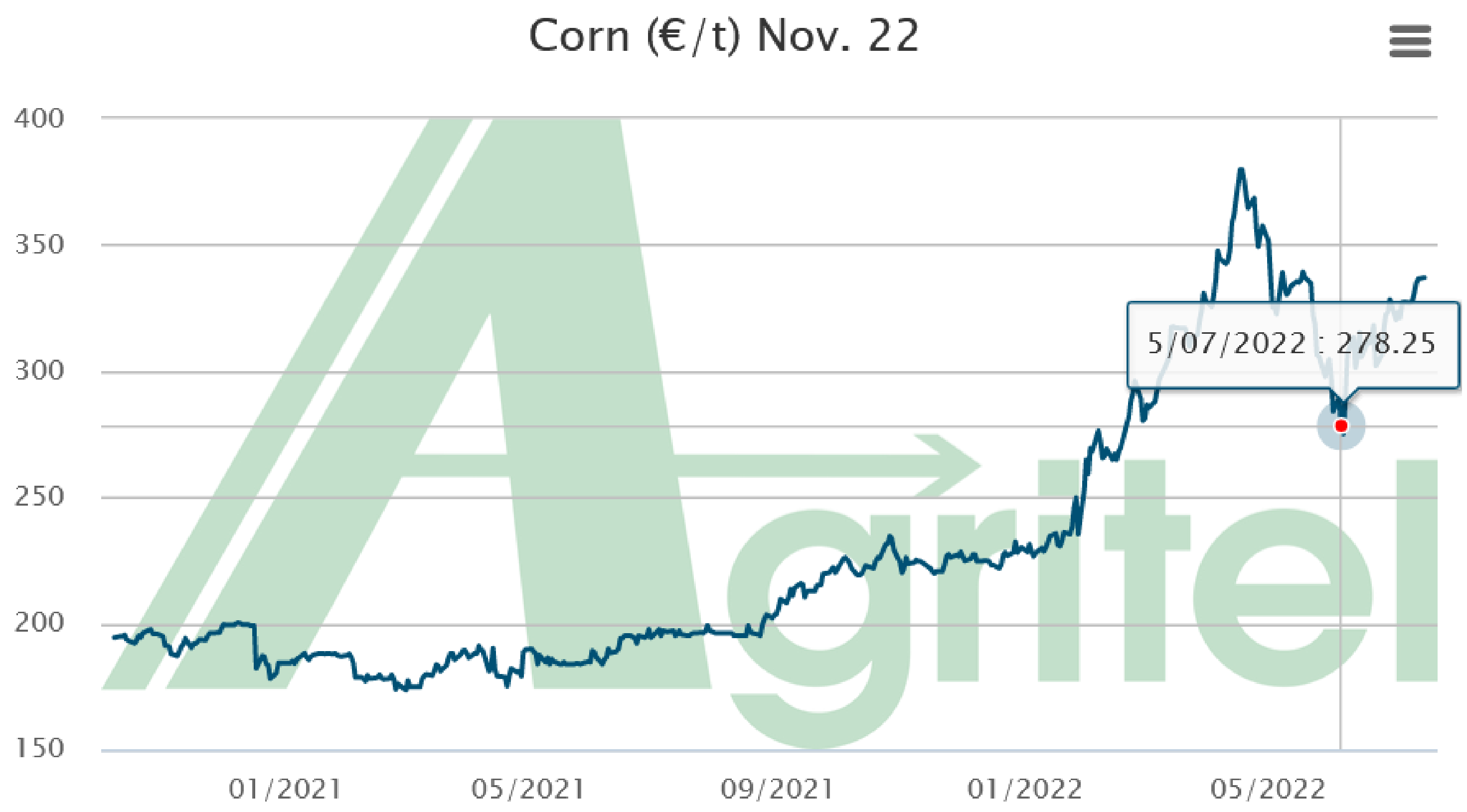
CANCEL

Ny skörd: 320 €/t, basis (dec-22) – 5,25 €/t

Skörd 2023: 300 €/t, basis (sept-23) +3 €/t


Rapeseed (€/t) Nov. 22
16/05/2022 : 866.25
1000
800
600
400
200
07/2020
01/2021
07/2021
01/2022
07/2022
Agritel

CANCEL


Corn (€/t) Nov. 22
400
350
300
250
200
150
01/2021
05/2021
09/2021
01/2022
05/2022
5/07/2022 : 278.25
Agritel

CANCEL

USDA report 12.8. 2022

Wheat – Balance Sheet Evolution

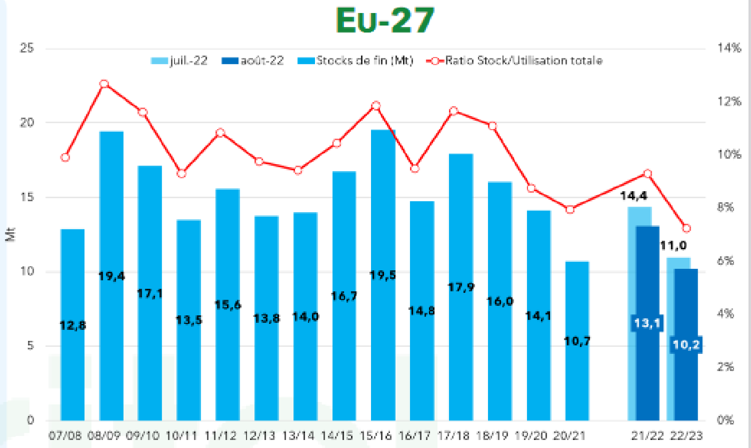
Agritel
An Argus Media company

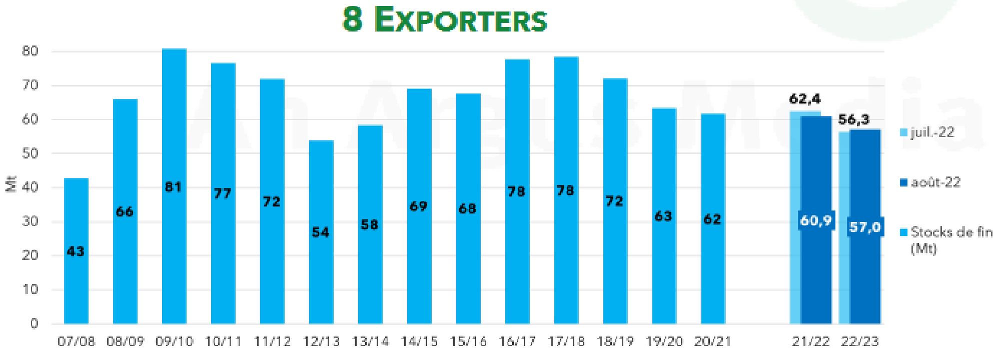
The word of the expert

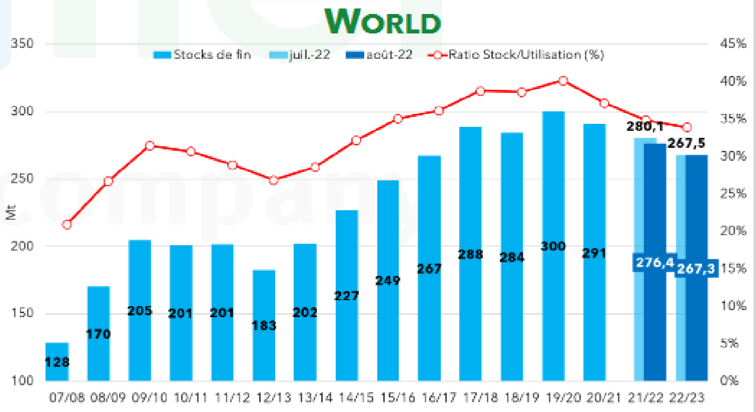
The USDA report was very much awaited by operators, mainly for the Black Sea changes. On Russia, the American department revised Russian production up by + 6.5 Mt to 88 Mt although many analysts are now well above this figure. Exports have risen by +2 Mt to 42 Mt and will be closely monitored in the coming weeks. On the Ukrainian side, production is unchanged while exports have risen by + 1 Mt to 11 Mt following the opening of the corridor. Faced with this and logically, European production (excluding the UK) is revised downwards by - 2 Mt to 132.1 Mt, while animal consumption is slightly reduced despite the extreme competitiveness of wheat against corn due to the drop in livestock. Exports are also revised downwards by - 2 Mt to 33.5 Mt, resulting in a very tight stock of 10.18 Mt.
The US exports are, on the contrary, revised upwards by + 0,68 Mt to 22,45 Mt, which tightens the stock at 16,6 Mt, below analysts' expectations. On the other hand, Canadian and Australian production is revised upwards by + 1 Mt and + 3 Mt to 35 Mt and 33 Mt respectively. Globally, the ending stock remains almost unchanged but below expectations at 267.34 Mt. The increase in world trade and animal demand compensates for the sharp rise in Russian production.

Conclusion

At first glance, this report appears slightly bullish, but the focus will remain on the Russian crop and especially on the export rate of Ukraine and Russia. So this report comes out as neutral.







Vete

- På plussidan

-Bra internationell efterfrågan

-Minskad areal i Ukraina 2023

-Vete blir mera konkurrenskraftigt med majsen när majspriset stiger

-Spannmålslagren i Europa på sin lägsta nivå sedan 2007

- På minussidan

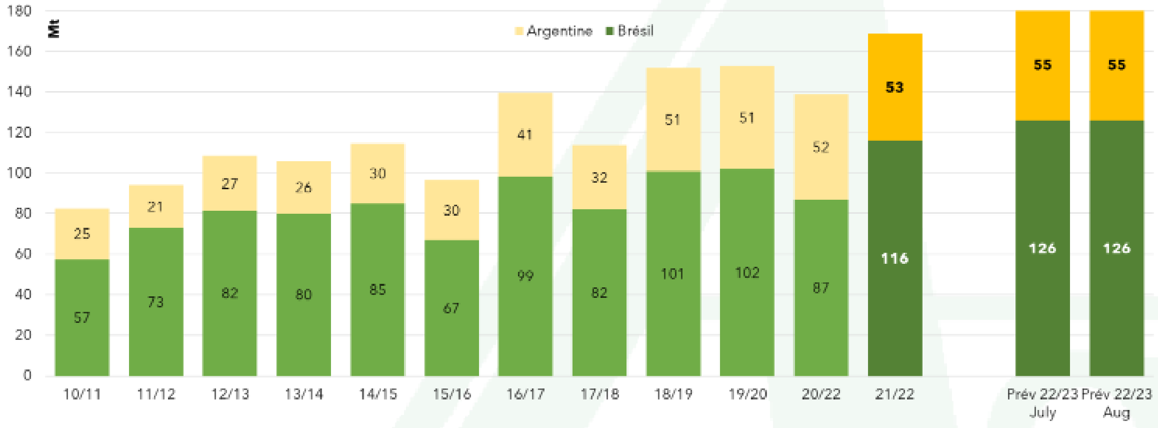
-Ryska produktionen större än beräknat

-Exporten från Ukraina fås igång ordentligt

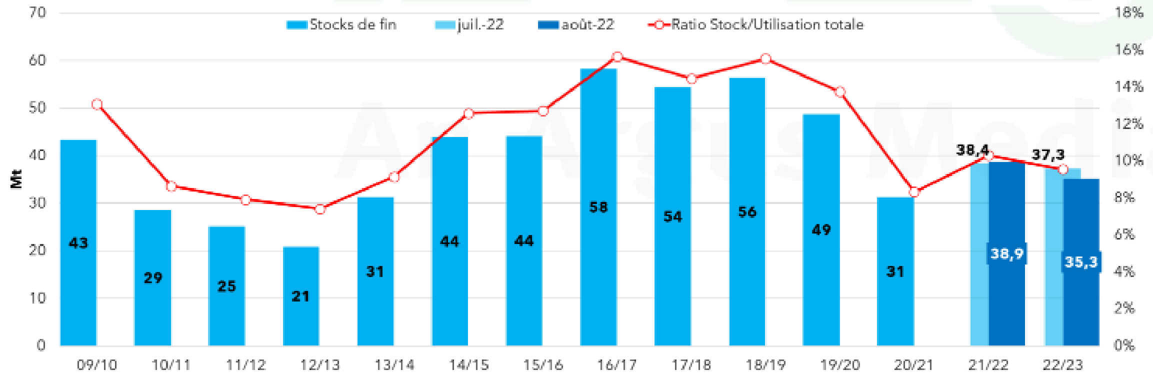
Corn - Balance Sheet Evolution

Agritel
An Argus Media company

Production
Argentina - Brazil



Ending Stocks
USA



The word of the expert

The USDA report remains the main event of August and this time again it did not disappoint. A lot of changes were expected, starting with the US production level. With water deficits affecting part of the Corn Belt, the USDA cut the final yield from 177 bu/acre expected last month to 175.4 bu/acre in August, bringing production down by 3.71 Mt to 364.73 Mt. While consumption and exports are very slightly lower, US ending stocks are down 2.06 Mt to 35.27 Mt, slightly below expectations.

Secondly, operators had a close look at the level of European production as the dry weather continues in Europe. Production fell by 8 Mt to 60 Mt, which seems to be overestimated. To adjust the balance, imports increase by 3 Mt to 19 Mt while domestic consumption falls. With these numerous adjustments, the final stock only falls by -1.02 Mt to 7.56 Mt, remaining on low levels.

On the geopolitical side, the Ukrainian export target was also under focus after the agreement signed recently. It was increased from 9 Mt to 12.5 Mt, without affecting the final stock as production was re-evaluated by +5 Mt to 30 Mt. At the same time, we note an increase in domestic consumption. On the Brazilian side, the current crop is still estimated at 116 Mt and exports at 44.50 Mt for the 2021/22 campaign.

Finally, in China, imports are still announced at 18 Mt, leaving the final stock for 2022/23 unchanged at 204.22 Mt. The end-of-season world stock falls by 6.26 Mt to 306.68 Mt, which is below the average of expectations (309.82 Mt).

Conclusion

With European and US production cut and US exports almost unchanged in 2022/23, the final stock is below average expectations in the US, as well as globally. For these reasons, the report is slightly bullish.

Majs

- På plussidan

-Minskad produktion i Europa, bra till mycket bra 53% i Frankrike

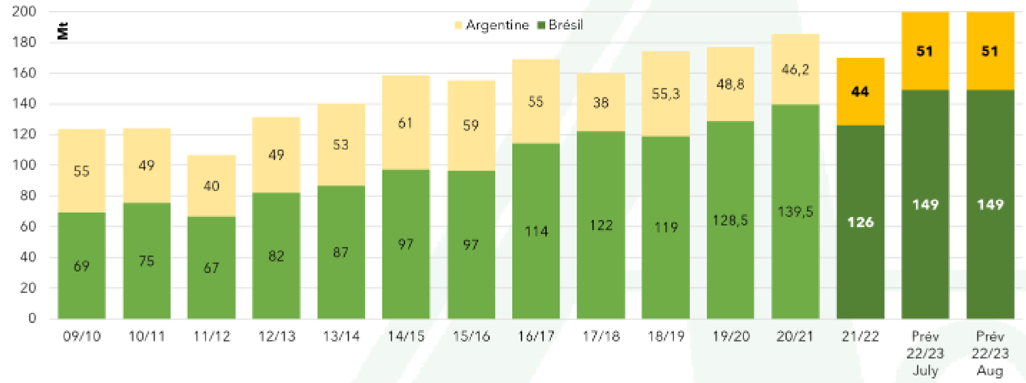
-Lägre skördenivåer i USA

- På minussidan

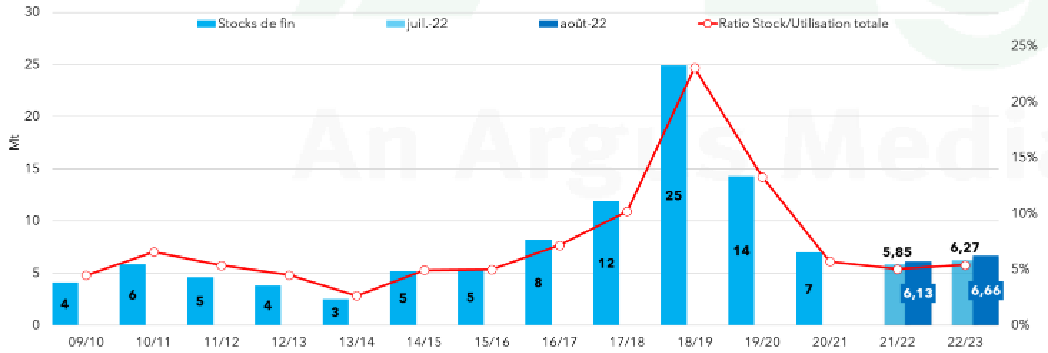
-Försämrad konkurrenskraft i förhållande till andra spannmål te x vete

Soybean – Balance Sheet Evolution

Production
Argentina - Brazil



Ending Stocks
USA



The word of the expert

Unexpectedly, the USDA has revised the US soybean yield upwards from 51.5 to 51.9 bushels/acre. This increase in yield offsets the slight decrease in harvested area. This would allow the country to reach a new production record at 123.3 Mt compared to 122.6 Mt last month. On the other hand, the country is starting the 2022/23 campaign with more stocks due to disappointing exports at the end of the 2021/22 campaign. The exports for the 2022/23 campaign are revised upwards by + 0.54 Mt to 58.65 Mt, while Chinese purchases are decreasing after large purchases a few months ago. The US ending stock is therefore above expectations at 6.66 Mt. For the time being, imports from China are unchanged at 98 Mt against 90 Mt during the previous campaign. In South America, there are no changes in production estimates, although operators will be closely monitoring sowings during the autumn. The La Nina phenomenon is expected to continue well into the winter. Globally, the strong increase in production, which is still hypothetical at this time, allows a clear rebuilding of the ending stock at 101.41 Mt against 89.73 Mt for the 2021/22 campaign.

Conclusion

With world and US stocks above expectations, this report appears to be bearish. Nevertheless, the end of the growing cycle in the USA and the sowing in South America will have to be monitored.

Sojabönor

- På minussidan

-Slutlagren verkar växa i hela världen och USA

- På plussidan

-Importen från Kina fortsättningsvis stark

Estland-Finland

- Fodervete och foderkorn ungefär samma som i Estland
- Kategori 3 vete som motsvarar vårt brödvete (min 12 % protein) +12 €/ton levererat till Muuga

Kalkyler över uppskattade exportpriser, fodervete, 15.7.2022

- FOB Finland, Matif (dec-22)-25€/t. FOB kostnaden, cirka 11,5 €/tn plus övriga kostnader. NU: 325-25-15=285 €/t levererat till hamnen
- DAP Muuga, Matif (dec-22)-25€/t. FOB kostnaden i Estland, cirka 7 €/t plus övriga kostnader. NU: 325-25-11,5=288,50 €/t

2022 A SAAGI TOIDUNISU KATEGOORIAD:

Kvaliteedinäitaja	V	IV	III	II	I
Proteiin % min	10%	11%	12%	13%	14%
Kleepvalk % min	20	22	24	26	28
Langemisarv sek min	180	210	240	250	275
Mahukaal kg/hl min	73	74	75	76	77

Baltic Agro

- Viljahinnad
- Mahevilja hinnad
- Börsihinnad
- Viljalaod
- Lepingud
- Kontaktid
- Veohinnad
- Söödahinnad

Sisene kliendiportaali

Baltic Agro

Hinnad kehtivad Baltic Agro AS lepingulistele klientidele.

2022 | 2023

Vilja liik	Hind KM-ta	Tarnetingimus
Toidunisu 1 Kat.	357	Muuga
Toidunisu 1 Kat.	356	SILLAMÄE
Toidunisu 2 Kat.	343	Muuga
Toidunisu 2 Kat.	342	SILLAMÄE
Toidunisu 3 Kat.	331	SILLAMÄE
Toidunisu 3 Kat.	332	Muuga
Toidunisu 4 Kat.	319	SILLAMÄE
Toidunisu 4 Kat.	320	Muuga
Toidunisu 5 Kat.	310	Muuga

16.8. 2022

-Exportpris, 70 % går på export

Gödselpriser

- Yara Axan (27-0-1) , öppningspris 624 €/t- 659 €/t
- Yara Y 20 (27-2-3), 727 €/-762 €/t

Försäljningen stängd för tillfället pga stigande gaspris?

- Yara höstsäd Y 6, 791 €/t-831

-öppnar snart? Problem med kali leveranser

Frankrike

- Stark efterfrågan, -7 % lägre skörd än ifjol
- Frankrike ersätter endel av glappet från Ukraina till norra Afrika men det räcker inte
- Ryssland i nyckelställning men ingen vill ta risken att köpa därifrån
- 100 km från Rouen , basis dec-22-15€/t , normalt -20 €/t
- Vete medelskörd 7,3 t
- 2022: 40 % säkrat till 340 €/t
- Produktionskostnaden ligger på 240/250 €/t
- 2023: Risk för att man inte får kostnaderna täckta

Hypothesis	
Yield	73 qtx/Ha
Fertilizers : Nitrogen solution 30%	
inflation on supplies	20%
inflation on Material and building costs	10%
Farm fuel consumption	100 l/Ha
Salary 1.5 times the SMIC 2022/ 150 Ha	
CAP aid 2023: higher eco-regime	217,6 €/ha

	Price Nitrogen solution 30%																	
Fuel price / l without taxe	200	500	550	600	650	700	750	800	850	900	950	1000	1050	1100	1150	1200	1250	1300
0,4	188	214	218	224	229	233	238	242	247	251	256	260	265	269	274	278	283	287
0,5	190	216	220	226	230	235	239	244	248	253	257	262	266	271	275	280	284	289
0,6	191	217	221	227	232	236	241	245	250	254	259	263	268	272	277	281	286	290
0,7	193	218	222	229	233	238	242	247	251	256	260	265	269	274	278	282	287	291
0,8	194	220	224	230	234	239	243	248	252	257	261	266	270	275	279	284	288	293
0,9	195	221	225	231	236	240	245	249	254	258	263	267	272	276	281	285	290	294
1	197	222	227	233	237	242	246	251	255	260	264	269	273	278	282	287	291	296
1,1	198	224	228	234	239	243	248	252	257	261	266	270	274	279	283	288	292	297
1,2	199	225	229	235	240	244	249	253	258	262	267	271	276	280	285	289	294	298
1,3	201	227	231	237	241	246	250	255	259	264	268	273	277	282	286	291	295	300
1,4	202	228	232	238	243	247	252	256	261	265	270	274	279	283	288	292	297	301
1,5	204	229	233	240	244	249	253	257	262	266	271	275	280	284	289	293	298	302
1,6	205	231	235	241	245	250	254	259	263	268	272	277	281	286	290	295	299	304
1,7	206	232	236	242	247	251	256	260	265	269	274	278	283	287	292	296	301	305
1,8	208	233	238	244	248	253	257	262	266	271	275	280	284	289	293	298	302	307
1,9	209	235	239	245	249	254	258	263	267	272	276	281	285	290	294	299	303	308
2	210	236	240	246	251	255	260	264	269	273	278	282	287	291	296	300	305	309
2,1	212	238	242	248	252	257	261	266	270	275	279	284	288	293	297	302	306	311
2,2	213	239	243	249	254	258	263	267	272	276	281	285	290	294	299	303	308	312
2,3	215	240	244	250	255	259	264	268	273	277	282	286	291	295	300	304	309	313