

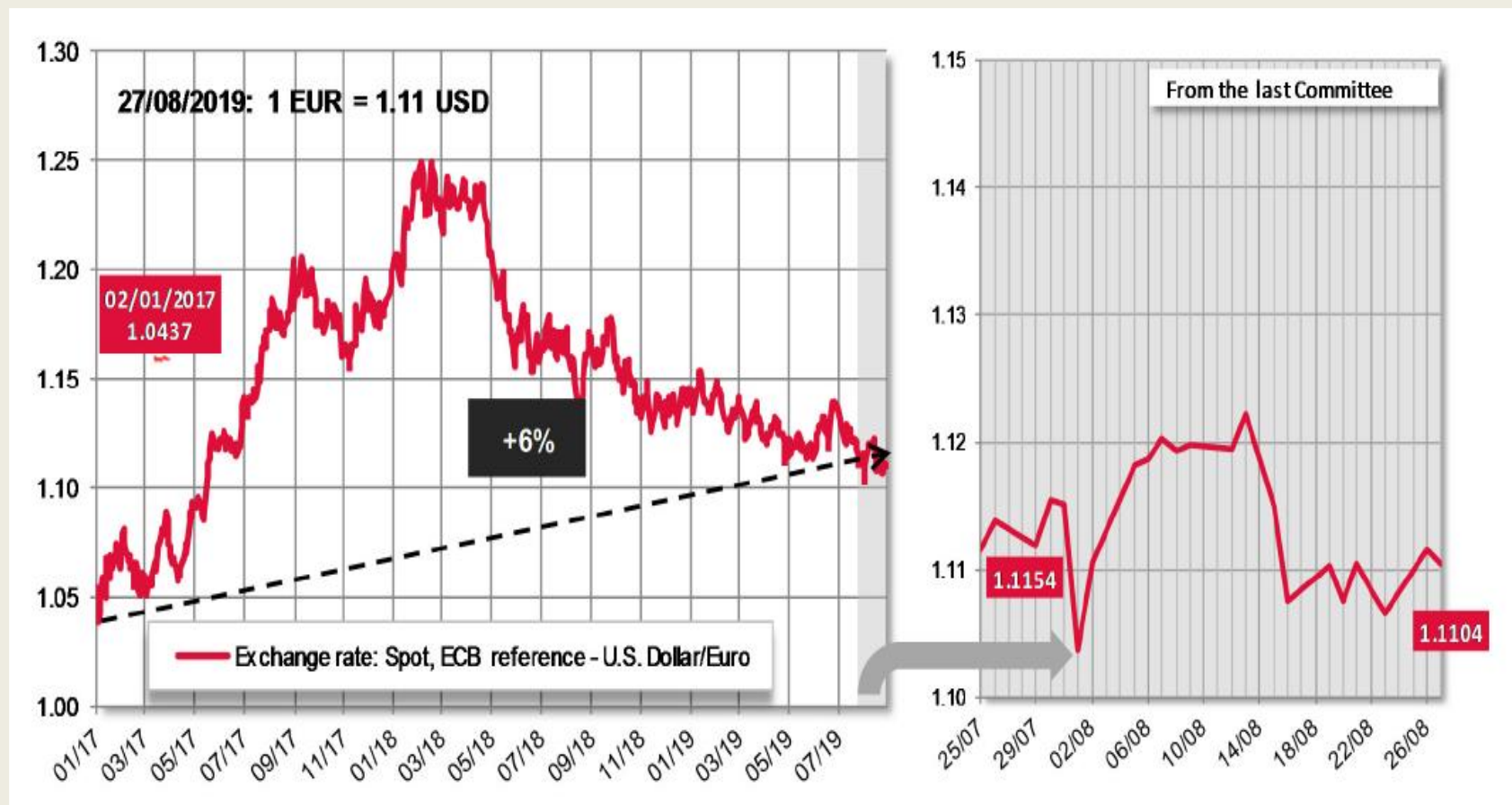


# 1. Intercambio de puntos de vista del mercado del arroz.

## Balances

Madrid, 10 de septiembre de 2019  
Mesa sectorial del arroz

# CAMBIO €/€



Fuente: DG AGRI agosto

# PETRÓLEO Y FLETES

## Crude oil price (\$/barrel)



## Baltic Dry Index



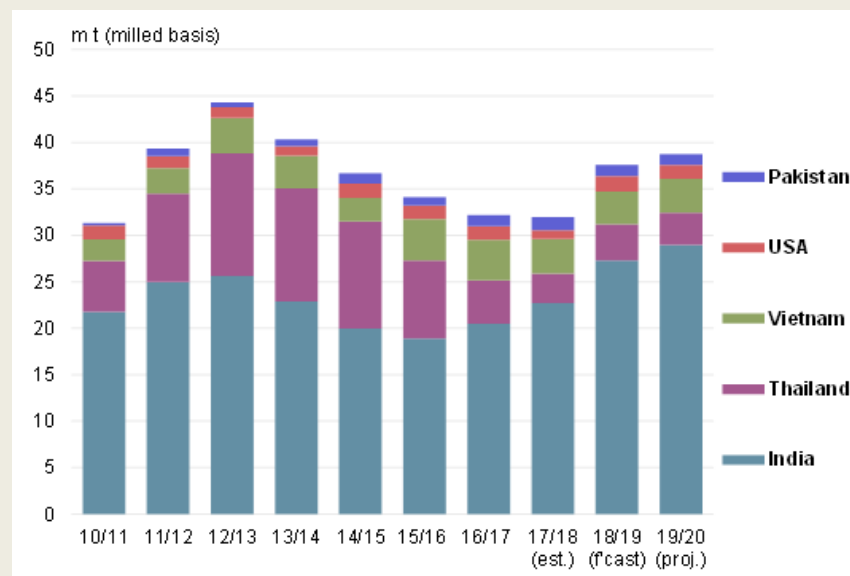
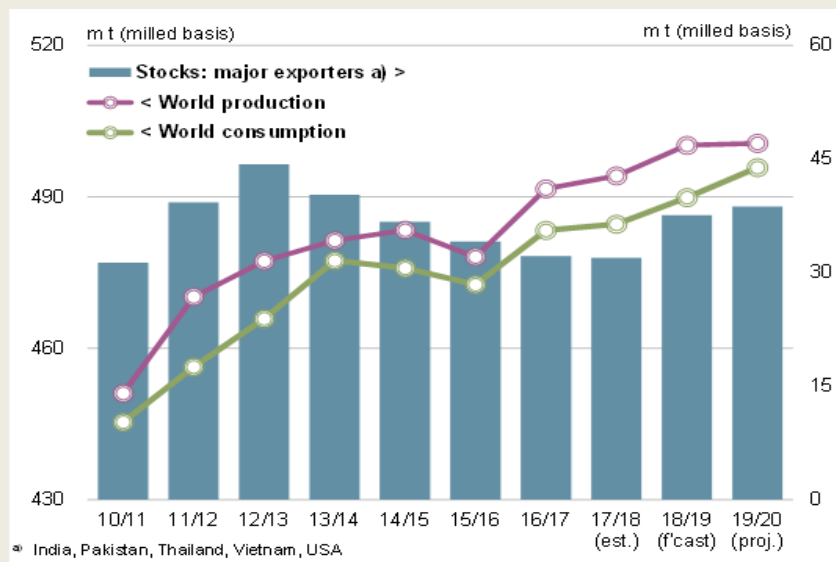
Fuente: DG AGRI agosto

## BALANCE MUNDIAL DEL ARROZ

m t (milled basis)	16/17	17/18 (est.)	18/19 (f'cast)	19/20 (proj.)	y/y change
Opening stocks	145	154	163	174	+ 6.3%
Production	492	494	500	501	+ 0.1%
<b>Total supply</b>	<b>637</b>	<b>648</b>	<b>663</b>	<b>674</b>	<b>+ 1.6%</b>
<b>Total use</b>	<b>483</b>	<b>485</b>	<b>490</b>	<b>496</b>	<b>+ 1.2%</b>
<b>Closing stocks</b>	<b>154</b>	<b>163</b>	<b>174</b>	<b>178</b>	<b>+ 2.8%</b>
<i>Major exporters</i> <sup>a)</sup>	32	32	38	39	+ 3.0%
<b>Trade (Jan/Dec)</b>	<b>47</b>	<b>46</b>	<b>45</b>	<b>46</b>	<b>+ 3.4%</b>

<sup>a)</sup> India, Pakistan, Thailand, USA, Vietnam

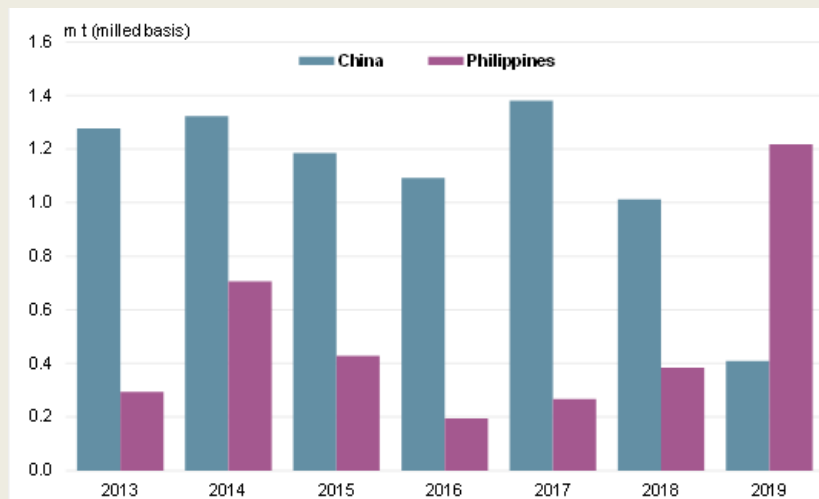
Existencias de los mayores exportadores



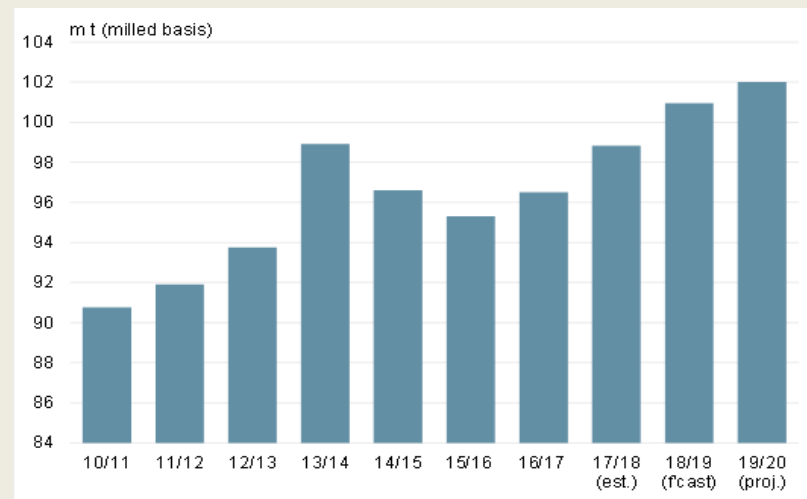
Fuente: informe IGC agosto

# NOTICIAS DE MERCADO

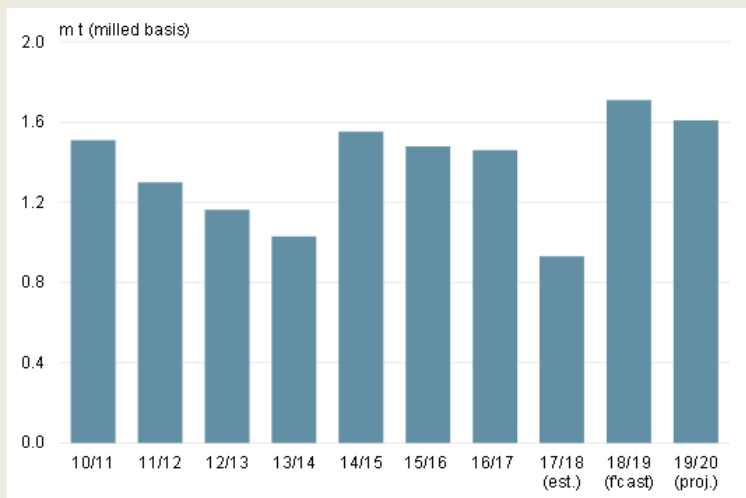
## Envíos de Vietnam (enero-junio)



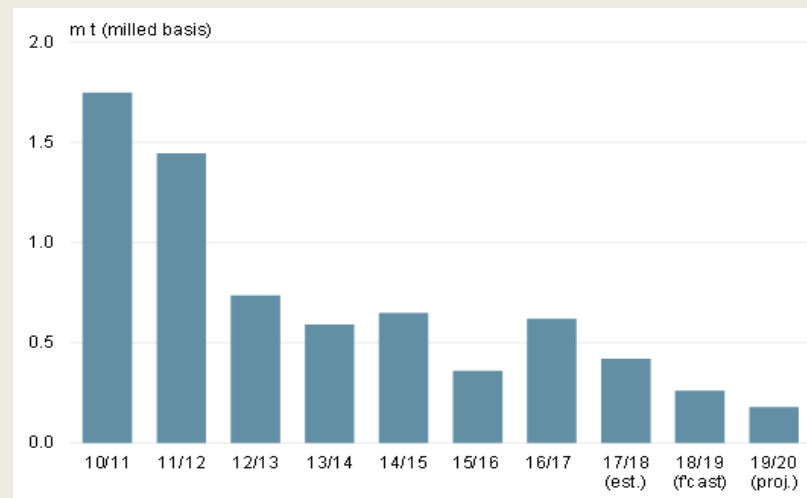
## Consumo de India



## Stocks finales USA

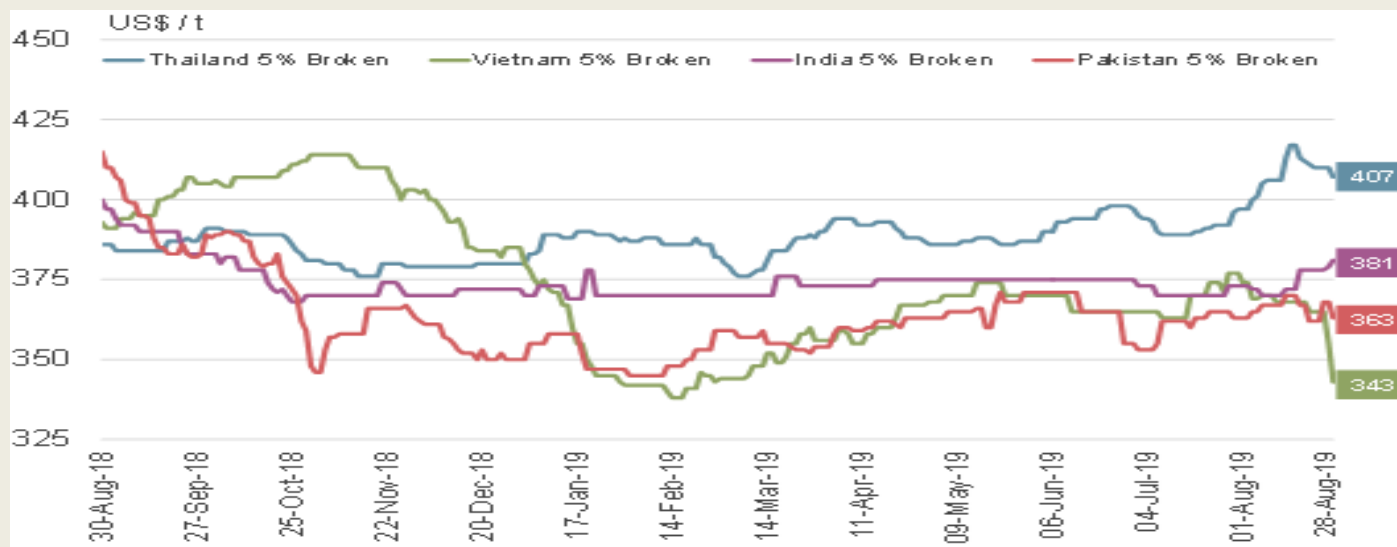


## Stocks finales Brasil

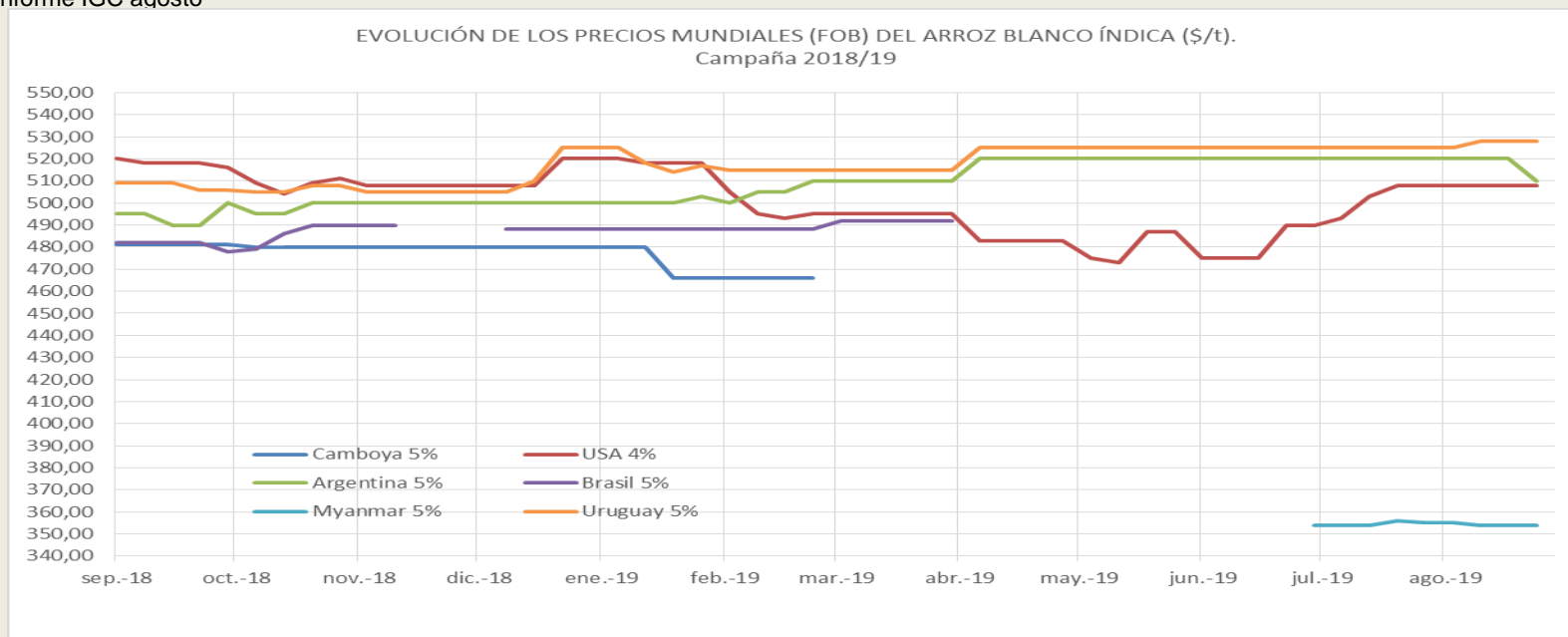


Fuente: informe IGC julio

# PRECIOS FOB (\$/t)



Fuente: informe IGC agosto



Fuente: Elaboración SGCHIAO

## BALANCE ARROZ UE

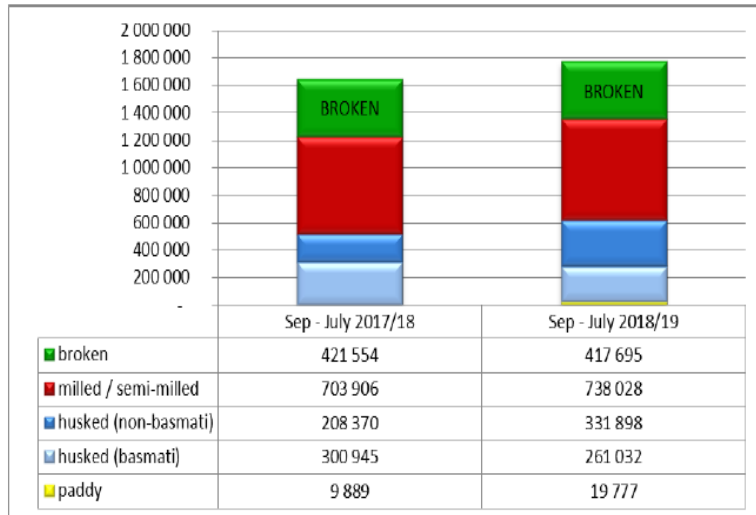
### EU Rice Balance Sheet 2018/19 : update on imports and exports

'000 metric tonnes (in milled equivalent)	2018/19 est			
	Japonica	Indica	TOTAL	
Beginning stocks				
<i>Private</i>	293	233	526	
<i>Intervention</i>	-	-	-	
Total beginning stocks	293	233	526	
<b>Usable production</b>	<b>1 203</b>	<b>418</b>	<b>1 621</b>	-6,4%
<i>Area ('000 ha)</i>	322	93	414	
<i>Agronomic yield (t/ha, on paddy basis)</i>	6.5	7.4	6.7	
<i>Milling yield (%)</i>	57%	61%	58%	
Imports (from third countries)	120	1 130	1 250	-55%
<b>TOTAL SUPPLY</b>	<b>1 615</b>	<b>1 781</b>	<b>3 397</b>	
Domestic uses				
<i>Human consumption / Industrial uses / Animal feed</i>	1 118	1 685	2 804	
<i>Seed ***</i>	37	9	46	
Total domestic uses	1 155	1 694	2 850	
Exports (to third countries)	220	27	247	-16%
<b>TOTAL USE</b>	<b>1 375</b>	<b>1 721</b>	<b>3 097</b>	
Final stocks ****				
<i>Private</i>	240	60	300	-50%
<i>Intervention</i>	-	-	-	
Total final stocks	240	60	300	
Change in stocks	-53	-173	-226	
Change in public stocks	-	-	-	

Fuente: DG AGRI abril 2019 (último disponible)

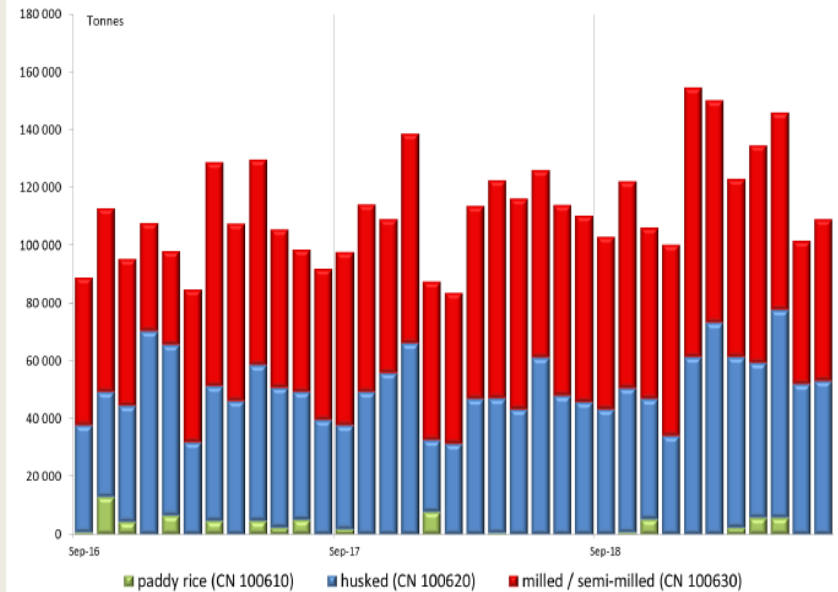
# Comercio exterior UE: Campaña 2018/19

**Total EU Rice Imports: Sep-July 2018/19 :  
+ 10 % vs Sep-July 2017/18: ≈ 1,35 Mio t (mill eq., excl broken)**

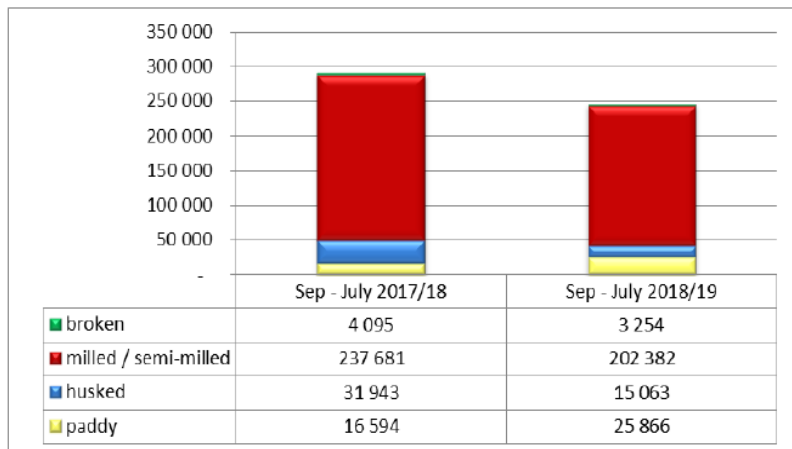


-1%  
+5%  
+59%  
-13%  
+100%

## Total EU Rice Imports per category

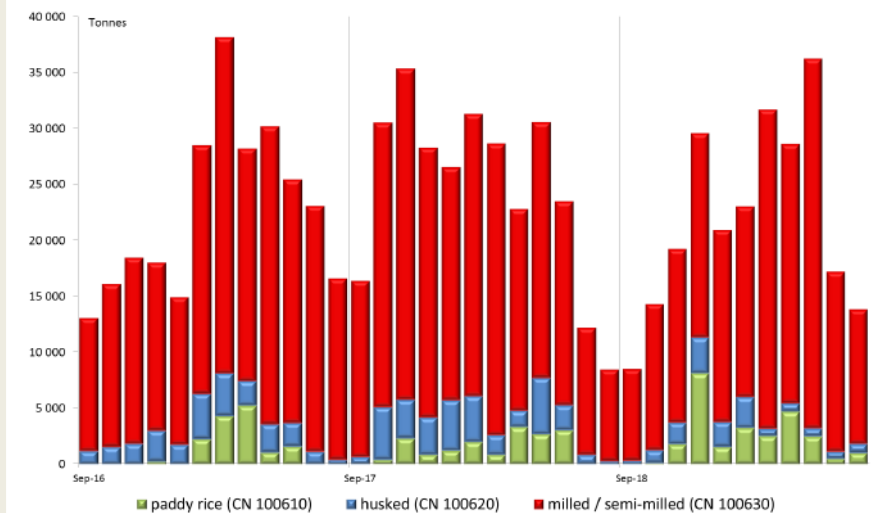


**Total EU rice exports: DOWN 15% in 2018/19  
Sep-July 2018/19: 243 311 t (milled eq, excl. broken)**



-21%  
-15%  
-53%  
+56%

## Total Rice Exports per category





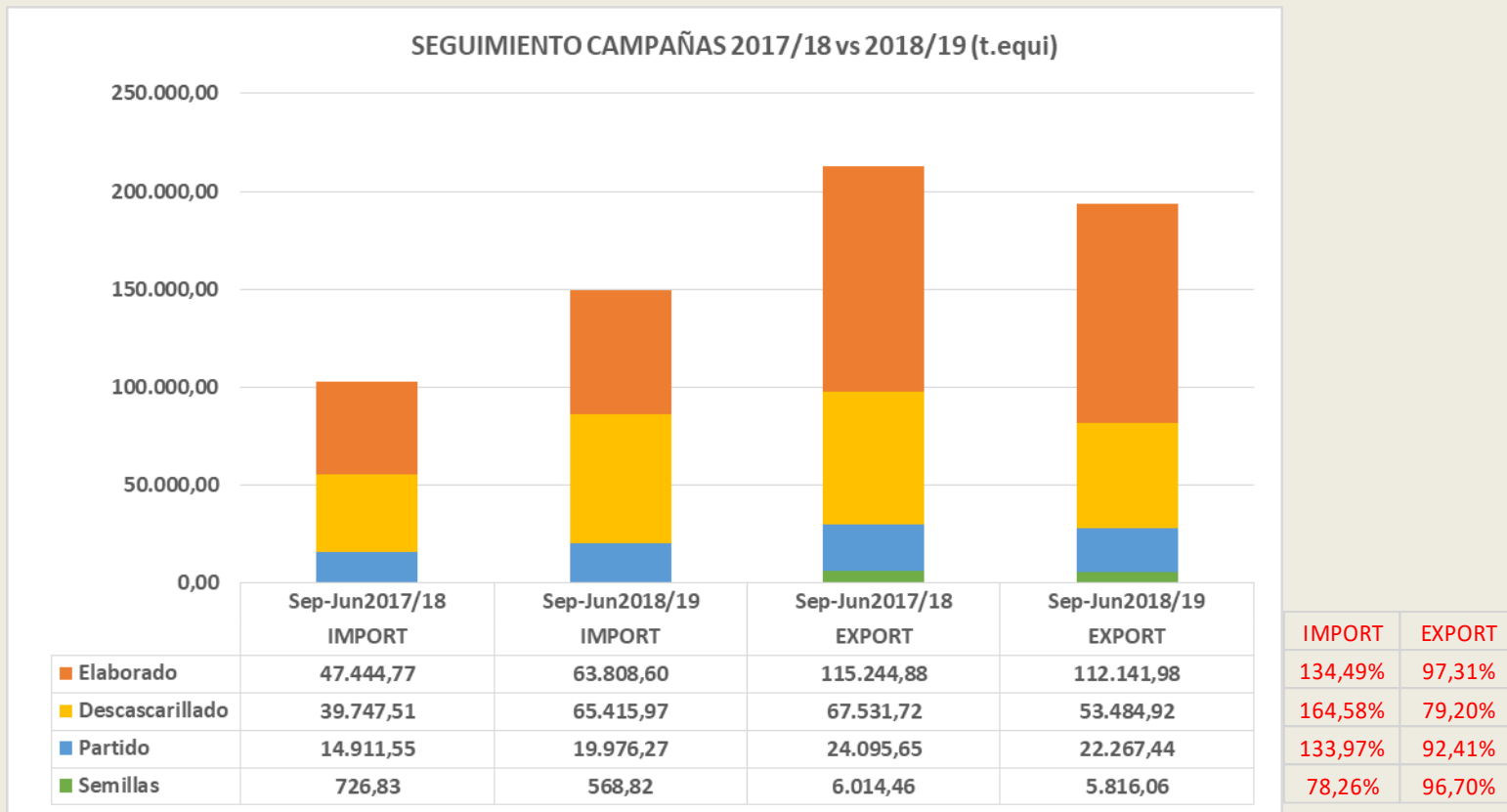
## Husked Rice Import Duties – end of MY review

- Reminder: import duties for husked rice are at 65 €/tonne since March 2019 (see Reg.(EU) No 2019/371)
- Rule: import duty for husked rice should be at 65€/tonnes if during the previous marketing year imports of husked rice exceeded 517 130 tonnes and 42.5 €/tonne if imports reached between 382 226 and 517 130 tonnes
- Based on import licences issued for husked rice (CN 1006 20, excluding Basmati) until 23 August the level of imports during MY 2018/19 will exceed 517 130 tonnes
- No change of import duties for husked rice

## Milled Rice Import Duties – end of MY review

- Reminder: import duties for semi-milled and milled rice (CN 1006 30) are at 175 €/tonne since March 2010 (see Regulation (EU) No 192/2010)
- Rule: import duty at 175 €/tonne if during the previous marketing year imports of semi-milled and milled rice exceed 387 743 tonnes
- Based on import licences issued for semi-milled and milled rice (CN 1006 30) the level of imports during MY 2018/19 will exceed 387 743 tonnes
- No need to change import duties for milled rice

# COMERCIO EXTERIOR ESPAÑA: 2017/18 vs 2018/19



	IMPORT Sep- Jun2017/18	IMPORT Sep- Jun2018/19	EXPORT Sep- Jun2017/18	EXPORT Sep- Jun2018/19	IMPORT	EXPORT
Total	102.830,66	149.769,66	212.886,69	193.710,40	145,65%	90,99%
Japónica	20.992,203	41.443,927	67.922,356	65.110,583	197,43%	95,86%
Indica	66.926,907	88.349,462	120.868,69	106.332,38	132,01%	87,97%

Fuente: Elaboración SGCHIAO con datos Eurostat

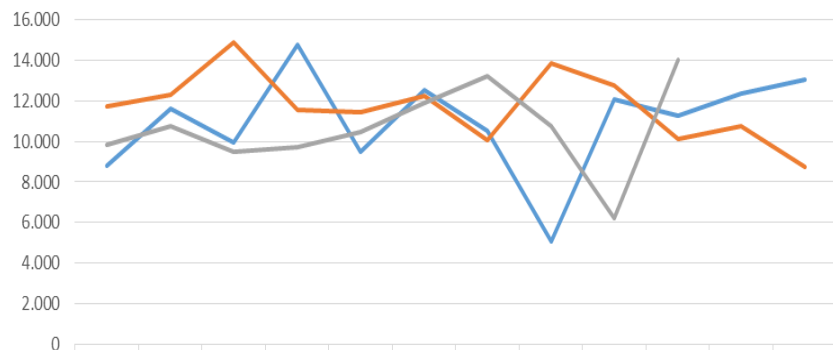
# BALANCE ARROZ ESPAÑA

TOTAL ARROZ						
Concepto/Campañas	2017/18			2018/19*		
	Japónica	Índica	Total	Japónica	Índica	Total
<b>A. ARROZ CÁSCARA</b>						
1. Superficie (ha.)	66.841	40.763	107.604	61.422	43.500	104.922
2. Rendimiento (t/ha)	7,17	8,73	7,76	7,50	8,81	8,04
3. Producción (t)	479.503	355.675	835.178	460.665	383.258	843.923
4. Producción para la venta (3-5)	466.135	347.522	813.657	448.381	374.558	822.939
5. Semillas	13.368	8.153	21.521	12.284	8.700	20.984
6. Rendimiento en molino (%)	54	55	54	58	59	58
<b>B. ARROZ ELABORADO</b>						
7. Disponibilidades internas	353.918	336.881	690.799	370.236	355.611	725.847
8. Existencias iniciales:	77.178	62.974	140.152	61.732	34.622	96.354
- intervención	0	0	0	0	0	0
9. Producción vendida (4x6)	251.713	191.137	442.850	260.061	220.989	481.050
10. Importaciones	25.027	82.769	107.797	48.444	100.000	148.444
11. Consumo interno	212.785	161.947	374.731	217.236	169.289	386.525
12. Exportaciones	79.402	140.312	219.714	76.000	126.322	202.322
13. Total Utilizaciones	292.186	302.259	594.445	293.236	295.611	588.847
14. Existencias finales	61.732	34.622	96.354	77.000	60.000	137.000

	Japónica	Índica	Total
10. Importaciones	193,57%	120,82%	137,71%
11. Consumo interno	102,09%	104,53%	103,15%
12. Exportaciones	95,72%	90,03%	92,08%
13. Total Utilizaciones	100,36%	97,80%	99,06%
14. Existencias finales	124,73%	173,30%	142,18%

(\*) Provisional

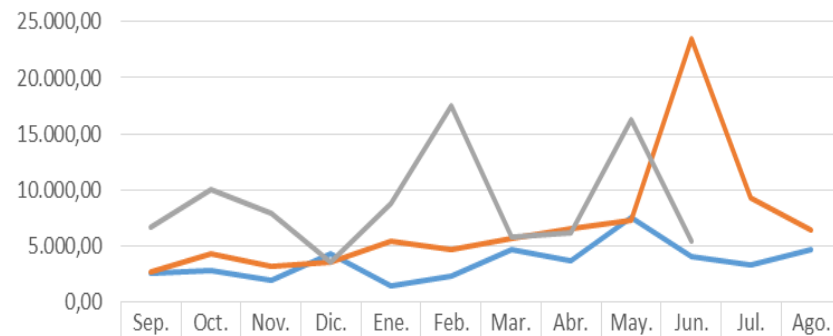
### EXPORT INDICA



	Sep.	Oct.	Nov.	Dic.	Ene.	Feb.	Mar.	Abr.	May.	Jun.	Jul.	Ago.
2016/17	8.780,88	11.614,0	9.946,00	14.765,5	9.467,82	12.550,3	10.495,0	5.053,88	12.070,7	11.253,6	12.364,1	13.012,2
2017/18	11.746,8	12.277,1	14.898,9	11.564,0	11.438,7	12.212,4	10.038,2	13.826,9	12.737,7	10.127,6	10.726,7	8.716,87
2018/19	9.806,70	10.729,0	9.515,41	9.696,49	10.460,5	11.876,4	13.224,2	10.736,1	6.246,86	14.040,4		

— 2016/17 — 2017/18 — 2018/19

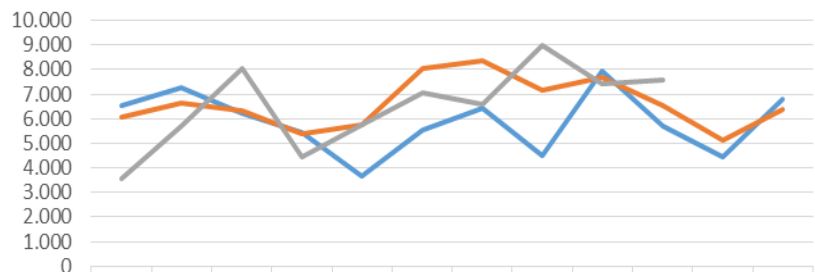
### IMPORT INDICA



	Sep.	Oct.	Nov.	Dic.	Ene.	Feb.	Mar.	Abr.	May.	Jun.	Jul.	Ago.
2016/17	2.627,	2.885,	1.954,	4.385,	1.449,	2.296,	4.701,	3.667,	7.519,	4.055,	3.374,	4.649,
2017/18	2.661,	4.370,	3.251,	3.553,	5.445,	4.650,	5.653,	6.537,	7.318,	23.485	9.357,	6.485,
2018/19	6.724,	10.054	7.883,	3.559,	8.817,	17.495	5.809,	6.249,	16.305	5.450,		

— 2016/17 — 2017/18 — 2018/19

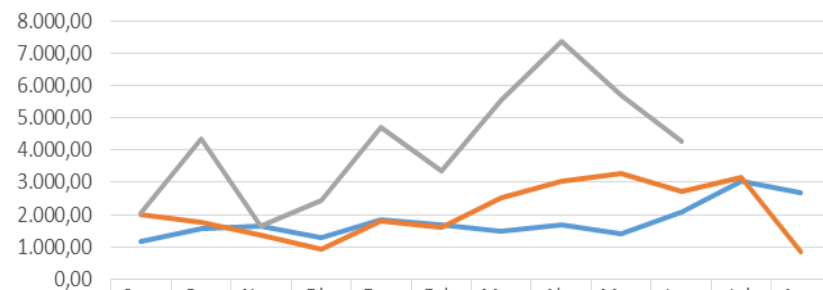
### EXPORT JAPÓNICA



	Sep.	Oct.	Nov.	Dic.	Ene.	Feb.	Mar.	Abr.	May.	Jun.	Jul.	Ago.
2016/17	6.513,	7.283,	6.194,	5.429,	3.690,	5.517,	6.416,	4.493,	7.933,	5.697,	4.440,	6.795,
2017/18	6.057,	6.630,	6.311,	5.363,	5.765,	8.035,	8.380,	7.148,	7.680,	6.549,	5.102,	6.377,
2018/19	3.544,	5.695,	8.060,	4.422,	5.757,	7.028,	6.580,	9.001,	7.431,	7.587,		

— 2016/17 — 2017/18 — 2018/19

### IMPORT JAPÓNICA



	Sep.	Oct.	Nov.	Dic.	Ene.	Feb.	Mar.	Abr.	May.	Jun.	Jul.	Ago.
2016/17	1.153,	1.579,	1.630,	1.295,	1.840,	1.694,	1.502,	1.668,	1.393,	2.092,	3.017,	2.678,
2017/18	1.997,	1.758,	1.356,	913,90	1.822,	1.612,	2.509,	3.043,	3.275,	2.702,	3.171,	863,14
2018/19	2.026,	4.337,	1.654,	2.457,	4.716,	3.351,	5.560,	7.362,	5.688,	4.288,		

— 2016/17 — 2017/18 — 2018/19

# PREVISIONES CAMPAÑA 2019/20

ARROZ		AVANCES DE SUPERFICIE Y PRODUCCIÓN				2019 MAYO			
		SUPERFICIES (HA)				PRODUCCIONES (1000 TM)			
PROVINCIAS Y CC-AA	2017	2018	2019	2019	2017	2018	2019	2019	
	DEFINITIVO	PROVISION AL	5	2018=100	DEFINITIVO	PROVISION AL	2018=100	2018=100	
<b>31 NAVARRA</b>	<b>2.141</b>	<b>2.018</b>	<b>2.219</b>	<b>110,0</b>	<b>11,940</b>	<b>11,341</b>			
22 Huesca	3.292	2.879	2.851		19,021	16,410			
44 Teruel	48	48	48		0,192	0,216			
50 Zaragoza	2.261	2.196	1.840		11,768	12,788			
<b>ARAGÓN</b>	<b>5.601</b>	<b>5.123</b>	<b>4.739</b>	<b>92,5</b>	<b>30,981</b>	<b>29,414</b>			
8 Barcelona									
17 Girona	941	1.064	1.086		3,395	6,200			
25 Lleida	49	5	5		0,374	0,040			
43 Tarragona	19.586	19.586	19.847		125,155	143,928			
<b>CATALUÑA</b>	<b>20.576</b>	<b>20.655</b>	<b>20.938</b>	<b>101,4</b>	<b>128,924</b>	<b>150,168</b>			
<b>7 BALEARES</b>	<b>32</b>	<b>32</b>	<b>36</b>	<b>112,5</b>	<b>0,073</b>	<b>0,070</b>			
2 Albacete	88	67	90		0,572	0,442			
<b>CASTILLA- MANCHA</b>	<b>88</b>	<b>67</b>	<b>90</b>	<b>134,3</b>	<b>0,572</b>	<b>0,442</b>			
3 Alicante	353	420			1,292	1,680			
12 Castellón	153	153			1,318	1,193			
46 Valencia	14.730	14.806	14.806		111,786	124,371			
<b>C. VALENCIANA</b>	<b>15.236</b>	<b>15.379</b>	<b>14.806</b>	<b>96,3</b>	<b>114,396</b>	<b>127,244</b>			
<b>30 R. DE MURCIA</b>	<b>445</b>	<b>456</b>	<b>435</b>	<b>95,4</b>	<b>2,674</b>	<b>2,700</b>			
6 Badajoz	18.200	16.500	15.000		127,491	113,000			
10 Cáceres	5.206	4.900	4.500		37,093	33,000			
<b>EXTREMADURA</b>	<b>23.406</b>	<b>21.400</b>	<b>19.500</b>	<b>91,1</b>	<b>164,584</b>	<b>146,000</b>			
11 Cádiz	2.569	2.700	2.699		34,061	35,702			
21 Huelva	29	27	27		0,274	0,250			
41 Sevilla	37.481	37.065	37.065		346,699	340,592			
<b>ANDALUCÍA</b>	<b>40.079</b>	<b>39.792</b>	<b>39.791</b>	<b>100,0</b>	<b>381,034</b>	<b>376,544</b>			
<b>ESPAÑA</b>	<b>107.604</b>	<b>104.922</b>	<b>102.554</b>	<b>97,7</b>	<b>835,178</b>	<b>843,923</b>			

Fuente: Fuente MAPA

# EVOLUCIÓN DE LA AYUDA ASOCIADA DEL ARROZ

	AYUDA ASOCIADA AL CULTIVO DEL ARROZ (201)							
	Sección 2ª del Capítulo I del Título IV del Real Decreto 1075/2014							
	Año 2015		Año 2016		Año 2017		Año 2018	
	SOLICITUDES ACEPTADAS	SUP DETERMINADA	SOLICITUDES ACEPTADAS	SUP DETERMINADA	SOLICITUDES ACEPTADAS	SUP DETERMINADA	SOLICITUDES ACEPTADAS	SUP DETERMINADA
ANDALUCÍA	975	39.870	975	39.383	972	40.105	978	39.241
ARAGÓN	310	5.925	290	5.291	284	5.095	275	4.899
ASTURIAS								
ISLAS BALEARES	17	27	12	24	11	27	11	28
CANTABRIA								
CASTILLA-LA MANCHA	15	114	22	163	15	115	11	82
CASTILLA Y LEÓN	2	102	1	85	1	85	1	85
CATALUÑA	1.887	20.533	1.588	20.190	1.559	20.199	1.526	20.591
EXTREMADURA	1.723	23.857	1.672	24.560	1.611	23.254	1.448	21.478
GALICIA								
MADRID					1	1	1	1
MURCIA	96	413	64	343	62	312	52	266
NAVARRA	114	2.279	109	2.274	120	2.268	112	2.130
PAÍS VASCO								
LA RIOJA								
C. VALENCIANA	3.020	14.950	2.077	14.369	1.996	14.206	1.985	13.254
TOTAL PENINSULAR	8.159	108.070	6.810	106.683	6.632	105.668	6.400	102.056
IMPORTE UNITARIO DE	112,944822		113,45468		114,722097		118,967677	

Fuente: Fuente FEGA



# GRACIAS!

***Olivia Merino de la Fuente***

*Jefe de área técnica*

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