

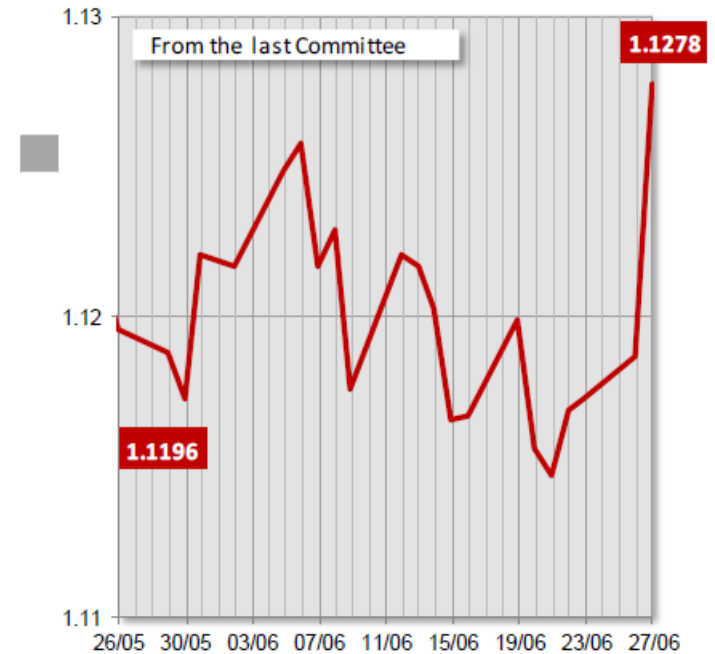
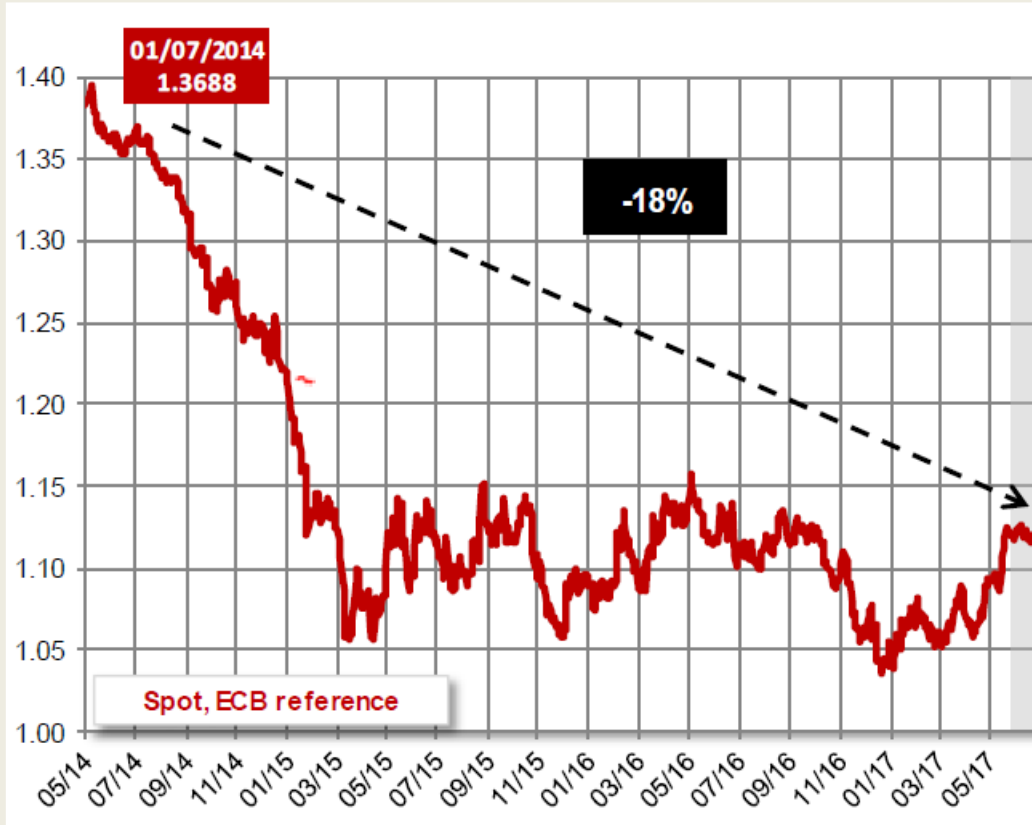


Intercambio de puntos de vista del mercado del arroz

Madrid 20 de julio de 2017



TIPOS DE CAMBIO



Madrid, 20 de Julio de 2017



Crude oil price (\$/barrel)



Madrid, 20 de Julio de 2017

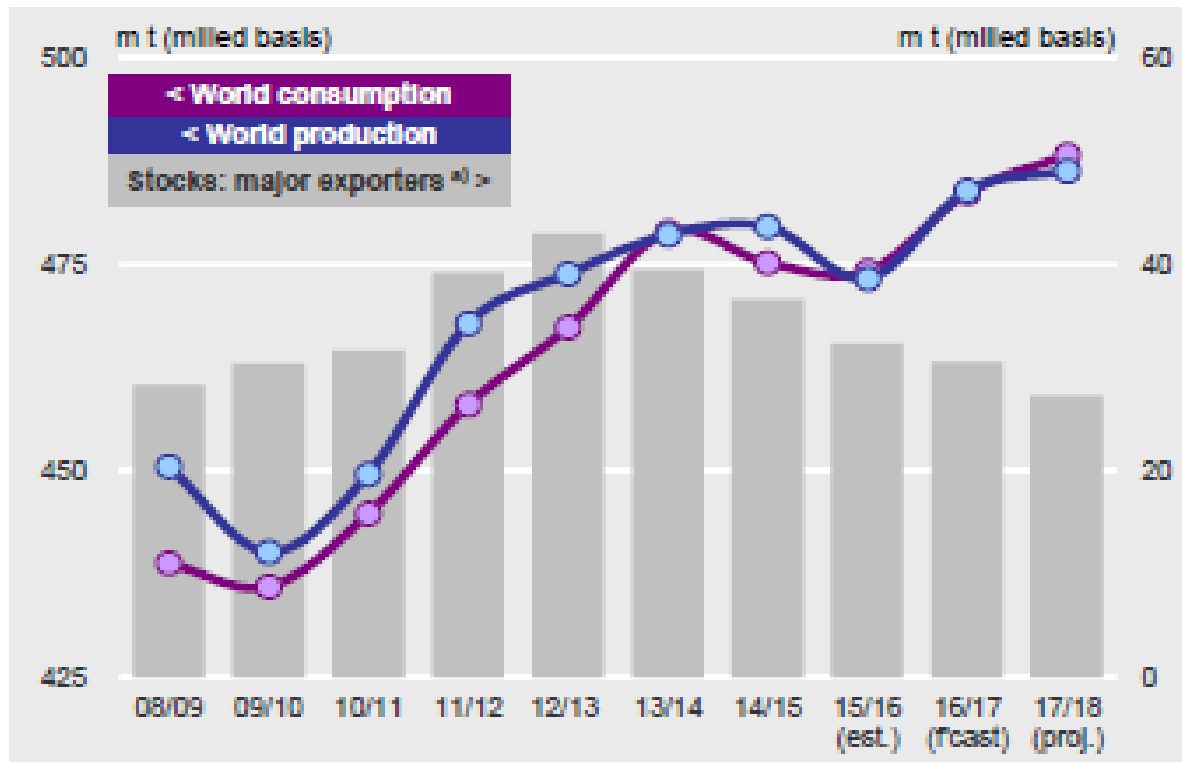


Baltic Dry Index



Madrid, 20 de Julio de 2017

Arroz: Oferta y demanda



a) India, Pakistán, Tailandia, Estados Unidos, Vietnam

Madrid, 20 de Julio de 2017

Fuente: CIC junio 2017

Arroz: Resumen de oferta y demanda

m t (milled basis)

| | 14/15 | 15/16 (est.) | 16/17 (f'cast) | 17/18 (proj.) | y/y change |
|-------------------------------|-------|-----------------|-------------------|------------------|---------------|
| Opening stocks | 116 | 121 | 120 | 120 | + 0.3% |
| Production | 480 | 473 | 484 | 486 | + 0.5% |
| Total supply | 596 | 594 | 604 | 607 | + 0.5% |
| Total use | 475 | 474 | 484 | 488 | + 1.0% |
| Closing stocks | 121 | 120 | 120 | 118 | - 1.6% |
| Major exporters ^{a)} | 37 | 32 | 31 | 27 | - 10.9% |
| Trade (Jan/Dec) | 41 | 39 | 42 | 42 | + 0.5% |

a) India, Pakistán, Tailandia, Estados Unidos, Vietnam

Madrid, 20 de Julio de 2017

Fuente: CIC junio 2017

BALANCE MUNDIAL ARROZ

| RICE (milled) | In million tonnes | | | | | | |
|------------------|-------------------|---------|-------|---------|---------|---------|---------|
| | FAO-AMIS | | | USDA | | IGC | |
| | 2016/17 | 2017/18 | | 2016/17 | 2017/18 | 2016/17 | 2017/18 |
| | est. | f'cast | | est. | f'cast | est. | f'cast |
| | 8-Jun | 8-Jul | | 9-Jun | | 20-Jun | |
| Production | 499.9 | 502.6 | 502.9 | 481.1 | 481.0 | 483.9 | 486.3 |
| Supply | 670.9 | 673.6 | 673.6 | 596.9 | 600.3 | 603.8 | 606.5 |
| Utilization | 499.7 | 505.7 | 505.6 | 479.6 | 479.7 | 483.6 | 488.2 |
| Trade | 44.2 | 44.2 | 44.4 | 42.0 | 42.7 | 41.6 | 41.8 |
| Stocks | 170.7 | 170.5 | 171.0 | 119.2 | 120.6 | 120.2 | 118.4 |

Fuente: AMIS julio 2017

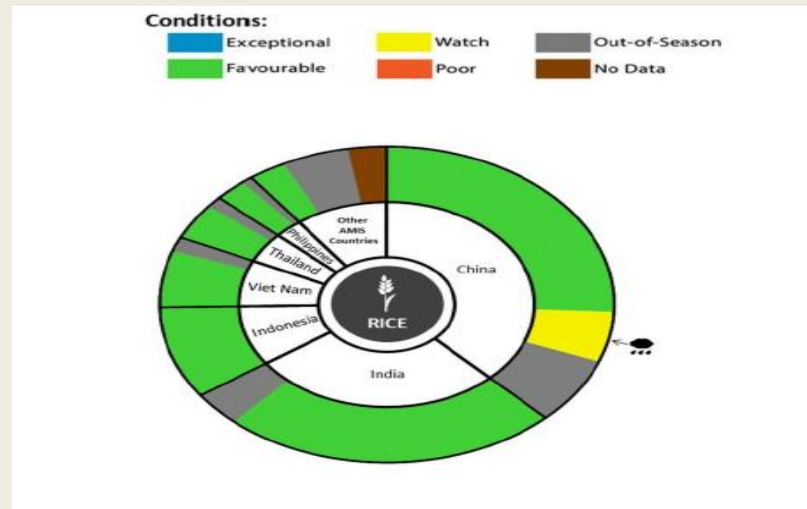
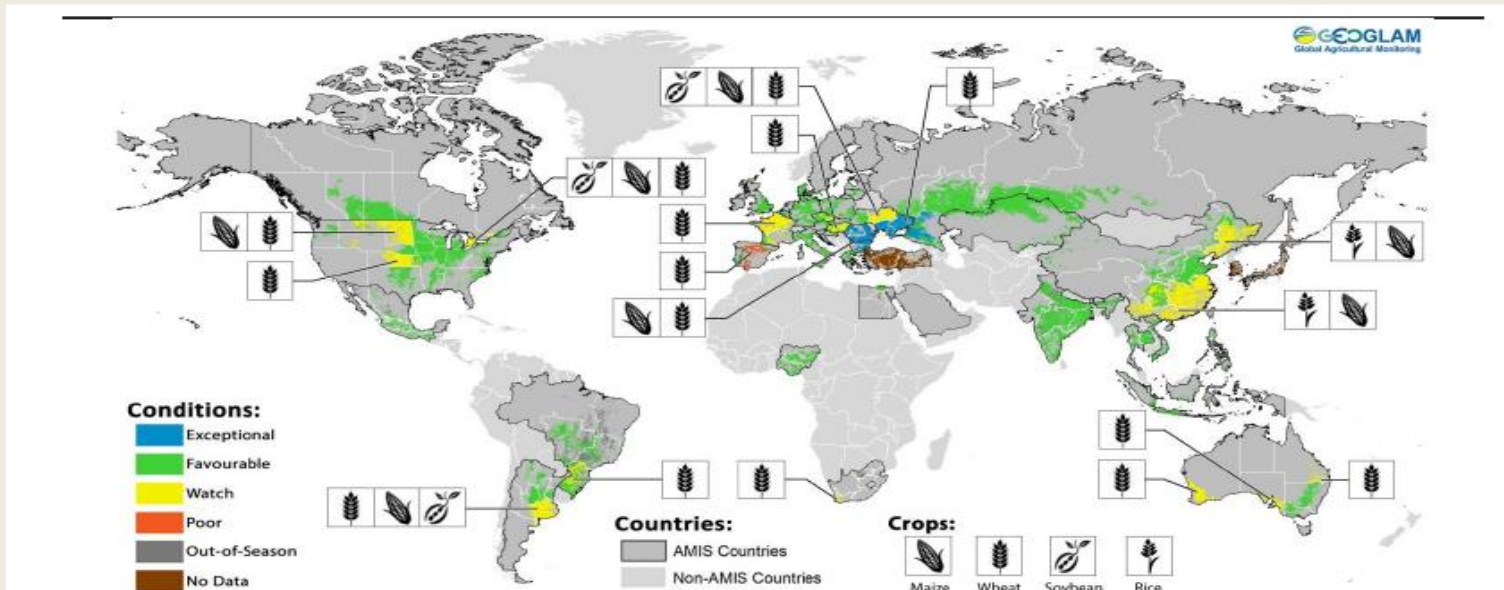
Madrid, 20 de Julio de 2017

PAISES PRODUCTORES ASIÁTICOS

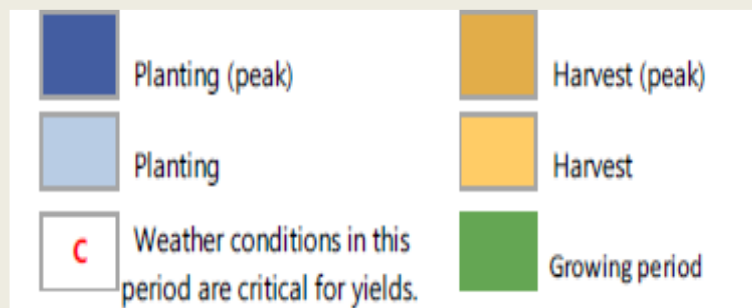
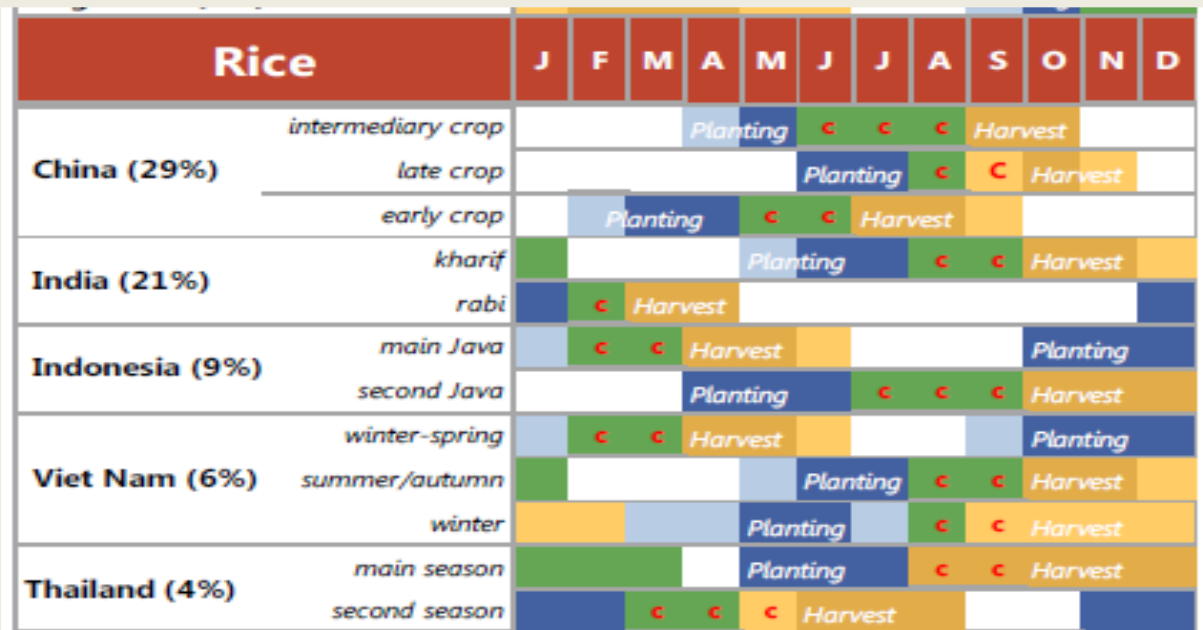


Madrid, 20 de Julio de 2017

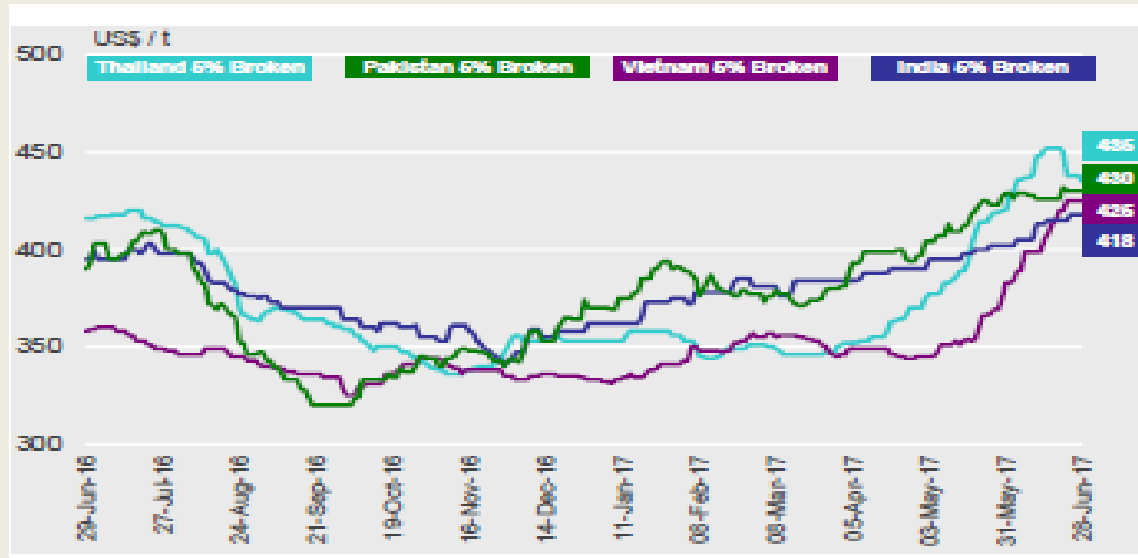
Condiciones y desarrollo del cultivo en países AMIS



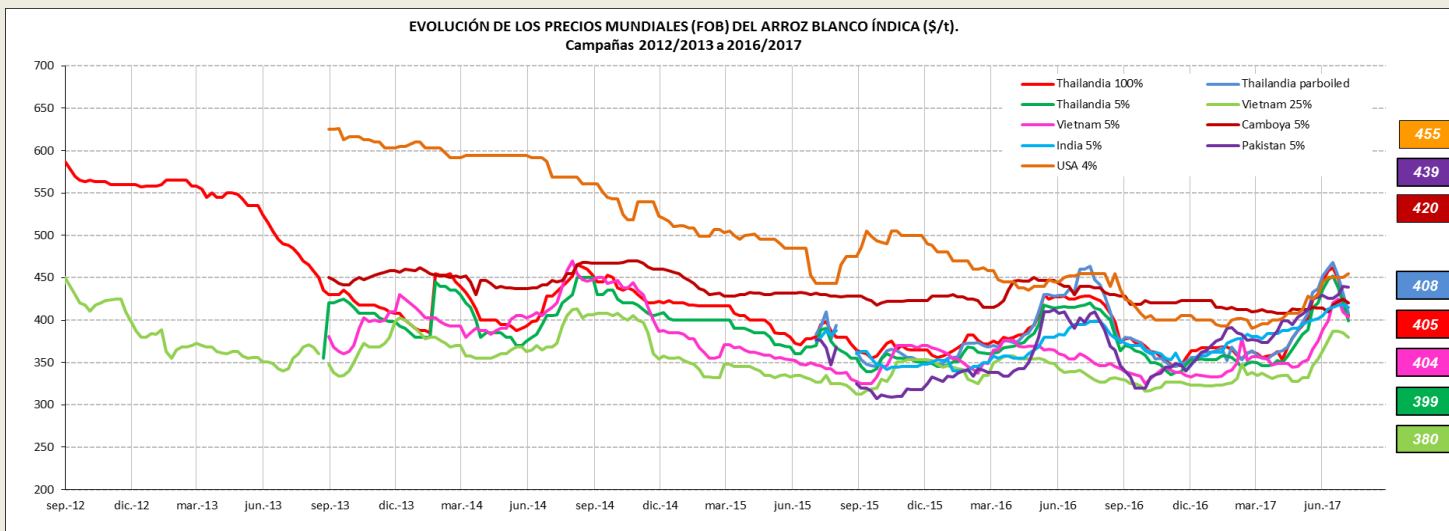
CALENDARIO DE CULTIVO AMIS-GEOGLAM



PRECIOS FOB (\$/t)



Fuente: CIC junio 2017



Fuente: Elaboración SGCHI

Madrid, 20 de Julio de 2017

PRECIOS UE y ESPAÑA: blanco y cáscara (€/t)



GOBIERNO DE ESPAÑA

MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

| | Última cotización €/t | Diferencia semanal €/t | % sobre la cotización | | | Mínimo campaña €/t | Máximo campaña €/t |
|---|-----------------------|------------------------|-----------------------|--------------|--------------|--------------------|--------------------|
| | | | semana anterior | mes anterior | año anterior | | |
| ARROZ BLANCO €/t | | | | | | | |
| <i>Elaboración Subdirección General de Cultivos Herbáceos e Industriales con fuente de los Comités de Gestión UE y la S. G. Estadísticas MAPAMA</i> | | | | | | | |
| <u>Unión Europea</u> | | | | | | | |
| ITALIA (japónica) | 550 | +10 | ↑ +2 | ↑ +6 | ↓ -14 | 520 | 640 |
| ITALIA (índica) | 560 | +0 | → +0 | ↑ +4 | ↓ -7 | 530 | 620 |
| FRANCIA (japónica) | 480 | +0 | → +0 | → +0 | ↓ -16 | 480 | 590 |
| FRANCIA (índica) | 570 | +0 | → +0 | ↑ +2 | → +0 | 530 | 600 |
| <u>España</u> | | | | | | | |
| ESPAÑA (japónica) | 579 | +0 | → +0 | → +0 | ↓ -1 | 569 | 585 |
| ESPAÑA (índica) | 577 | +0 | → +0 | → +0 | ↑ +6 | 545 | 577 |
| ESPAÑA (índica parboiled) | 621 | +0 | → +0 | → +0 | n/c | 607 | 758 |
| ARROZ CÁSCARA €/t | | | | | | | |
| <i>Elaboración Subdirección General de Cultivos Herbáceos e Industriales con fuente de los Comités de Gestión UE y la S. G. Estadísticas MAPAMA</i> | | | | | | | |
| Unión Europea. D.G. Agricultura. | | | | | | | |
| con datos de la Comisión Europea. D.G. Agricultura. | | | | | | | |
| <u>Unión Europea</u> | | | | | | | |
| ITALIA (japónica) | 255 | +5 | ↑ +2 | ↑ +9 | ↓ -4 | 235 | 300 |
| ITALIA (índica) | 285 | +0 | → +0 | ↑ +4 | ↓ -6 | 270 | 305 |
| GRECIA (índica) | 260 | +0 | → +0 | → +0 | ↓ -7 | 240 | 290 |
| <u>España</u> | | | | | | | |
| ESPAÑA (japónica) | 305 | +0 | → +0 | → +0 | ↓ -2 | 294 | 312 |
| ESPAÑA (índica) | 287 | +0 | → +0 | → +0 | ↓ -6 | 270 | 305 |

BALANCE ARROZ UE

| | 2014/15 | | | 2015/16 | | | 2016/17 fcst | | |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | Japonica | Indica | TOTAL | Japonica | Indica | TOTAL | Japonica | Indica | TOTAL |
| Beginning stocks | | | | | | | | | |
| <i>Private</i> | 191 | 281 | 471 | 157 | 283 | 441 | 270 | 272 | 542 |
| <i>Intervention</i> | - | - | - | - | - | - | - | - | - |
| Total beginning stocks | 191 | 281 | 471 | 157 | 283 | 441 | 270 | 272 | 542 |
| Usable production | 1.089 | 548 | 1.637 | 1.322 | 449 | 1.772 | 1.410 | 424 | 1.834 |
| <i>Area ('000 ha)</i> | 290 | 124 | 414 | 334 | 102 | 436 | 348 | 92 | 440 |
| <i>Agronomic yield (t/ha, on paddy basis)</i> | 6,3 | 7,3 | 6,6 | 6,8 | 7,4 | 6,9 | 6,8 | 7,8 | 7,0 |
| <i>Milling yield (%)</i> | 60% | 61% | 60% | 58% | 60% | 59% | 59% | 59% | 59% |
| Imports (from third countries) | 118 | 1.075 | 1.193 | 125 | 1.239 | 1.364 | 100 | 1.150 | 1.250 |
| TOTAL SUPPLY | 1.398 | 1.903 | 3.302 | 1.604 | 1.972 | 3.576 | 1.700 | 1.846 | 3.626 |
| Domestic uses | | | | | | | | | |
| <i>Human consumption / Industrial uses / Animal feed</i> | 993 | 1.583 | 2.576 | 1.091 | 1.660 | 2.751 | 1.228 | 1.551 | 2.780 |
| <i>Seed ***</i> | 34 | 12 | 47 | 39 | 10 | 49 | 41 | 9 | 50 |
| Total domestic uses | 1.028 | 1.595 | 2.622 | 1.130 | 1.669 | 2.800 | 1.270 | 1.560 | 2.830 |
| Exports (to third countries) | 213 | 26 | 239 | 204 | 30 | 234 | 220 | 30 | 250 |
| TOTAL USE | 1.241 | 1.620 | 2.861 | 1.334 | 1.699 | 3.034 | 1.490 | 1.590 | 3.080 |
| Final stocks **** | | | | | | | | | |
| <i>Private</i> | 157 | 283 | 441 | 270 | 272 | 542 | 290 | 256 | 546 |
| <i>Intervention</i> | - | - | - | - | - | - | - | - | - |
| Total final stocks | 157 | 283 | 441 | 270 | 272 | 542 | 290 | 256 | 546 |
| Change in stocks | -34 | 3 | -31 | 113 | -11 | 102 | 20 | -16 | 4 |
| Change in public stocks | - | - | - | - | - | - | - | - | - |

GRACIAS POR SU ATENCIÓN!

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Madrid, 20 de Julio de 2017