



Sorghum ^{ID}

Grain sorghum market around the world

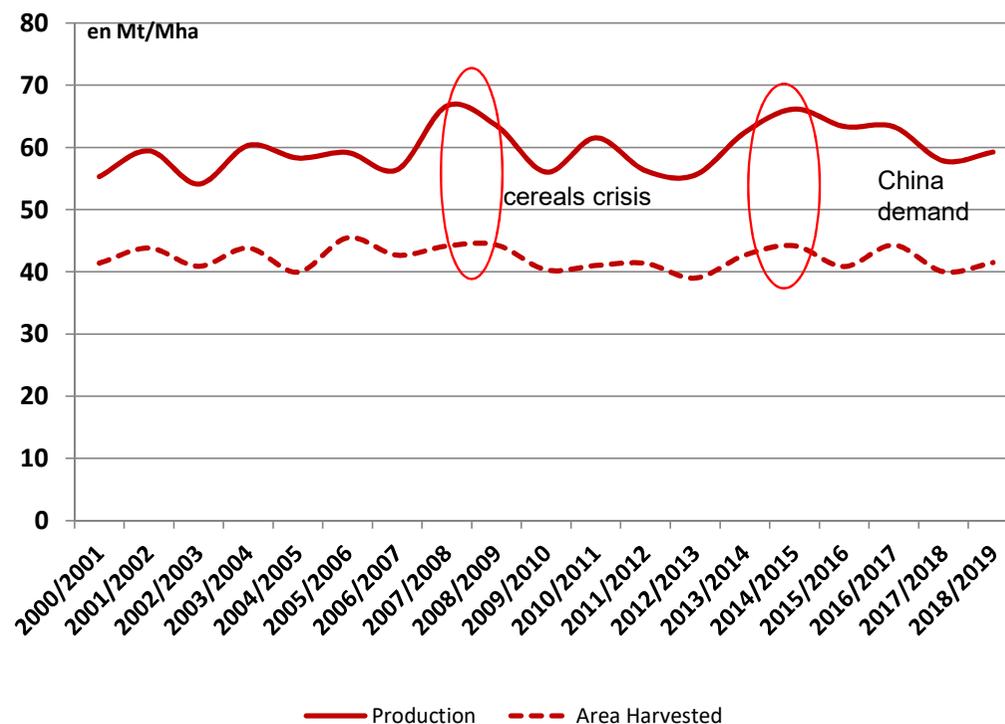
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SORGHUM PLACE ON THE CEREAL MARKET

Sorghum grain :

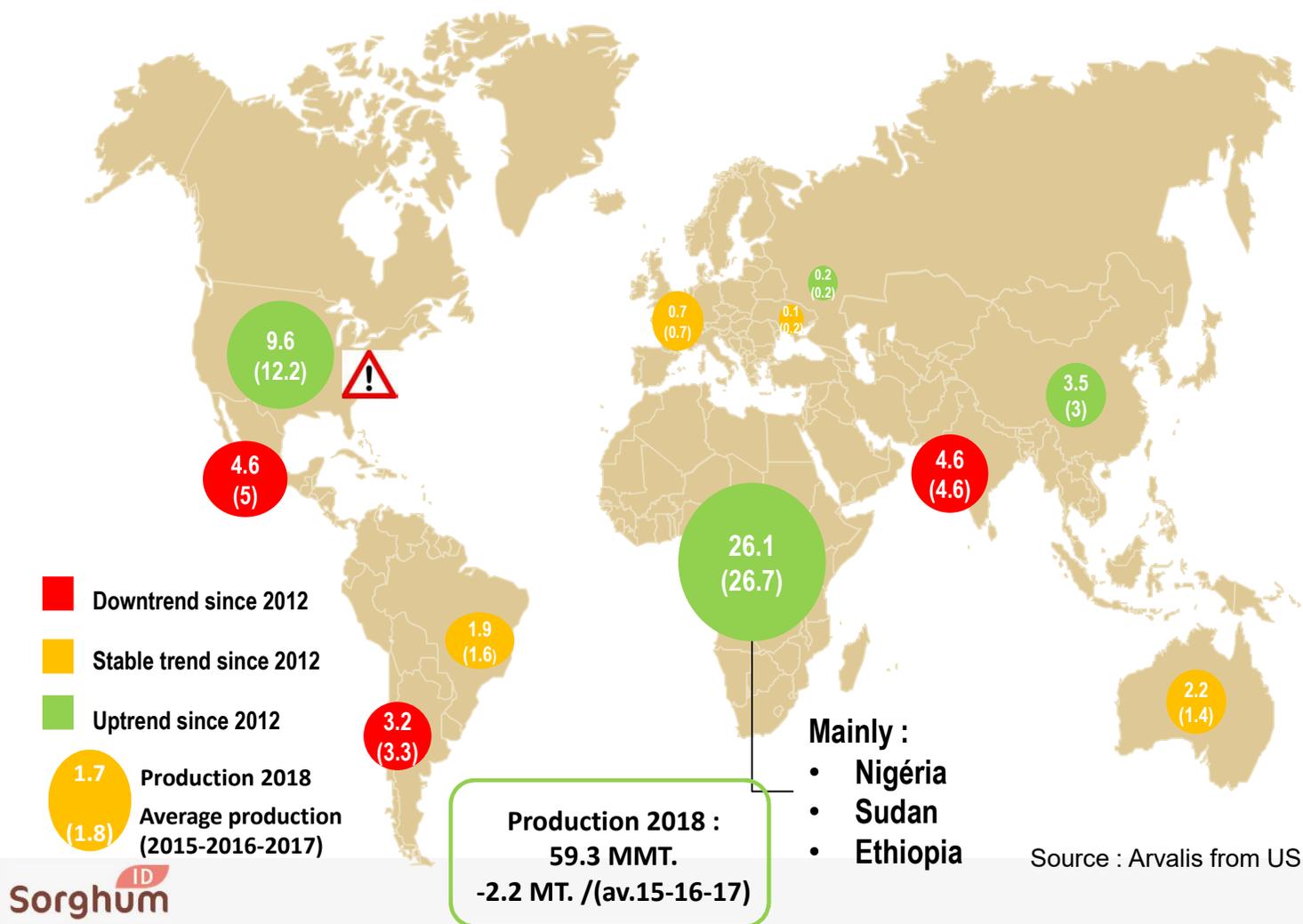
- ✓ 5th cereal cultivated and produced in the world after the three big ones : corn, wheat and rice
- ✓ 3% of the world cereal production
- ✓ A stable area & production since the earlier 2000s ≈ 42 Mha/year & 60 Mt./year

World area & production of sorghum grain



Source : Arvalis from USDA, October 2018

MAIN PRODUCING COUNTRIES



✓ All the continents concerned by the sorghum grain production

✓ 2 majors areas : Sub-Saharan Africa and North America

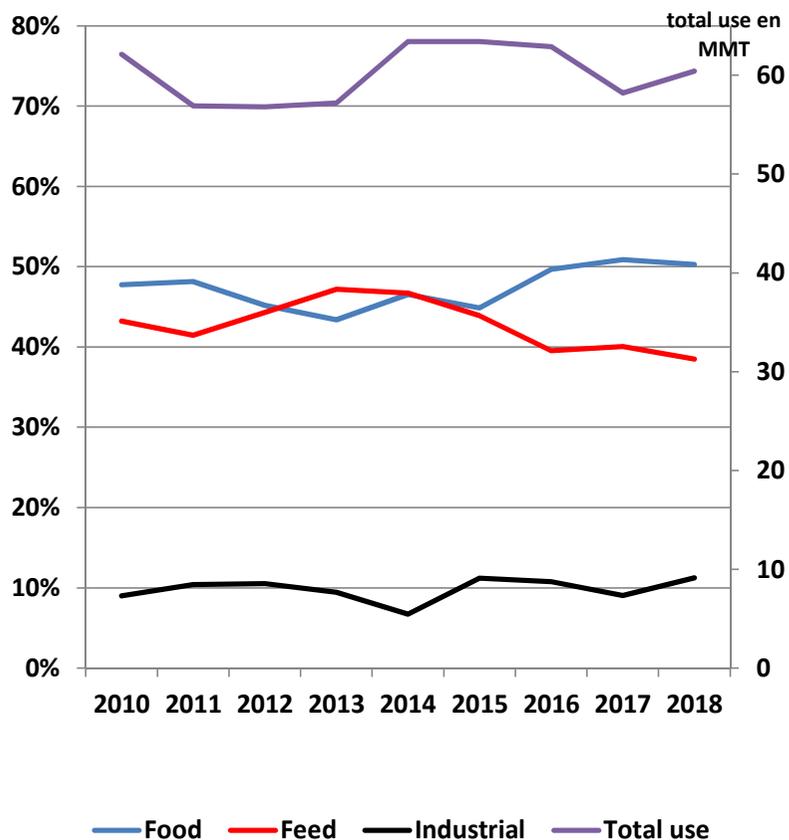
✓ Different development dynamics depending on the production area

- Mainly :
- Nigéria
 - Sudan
 - Ethiopia

Source : Arvalis from USDA, IGC, October 2018

2nd European Sorghum Congress 2018

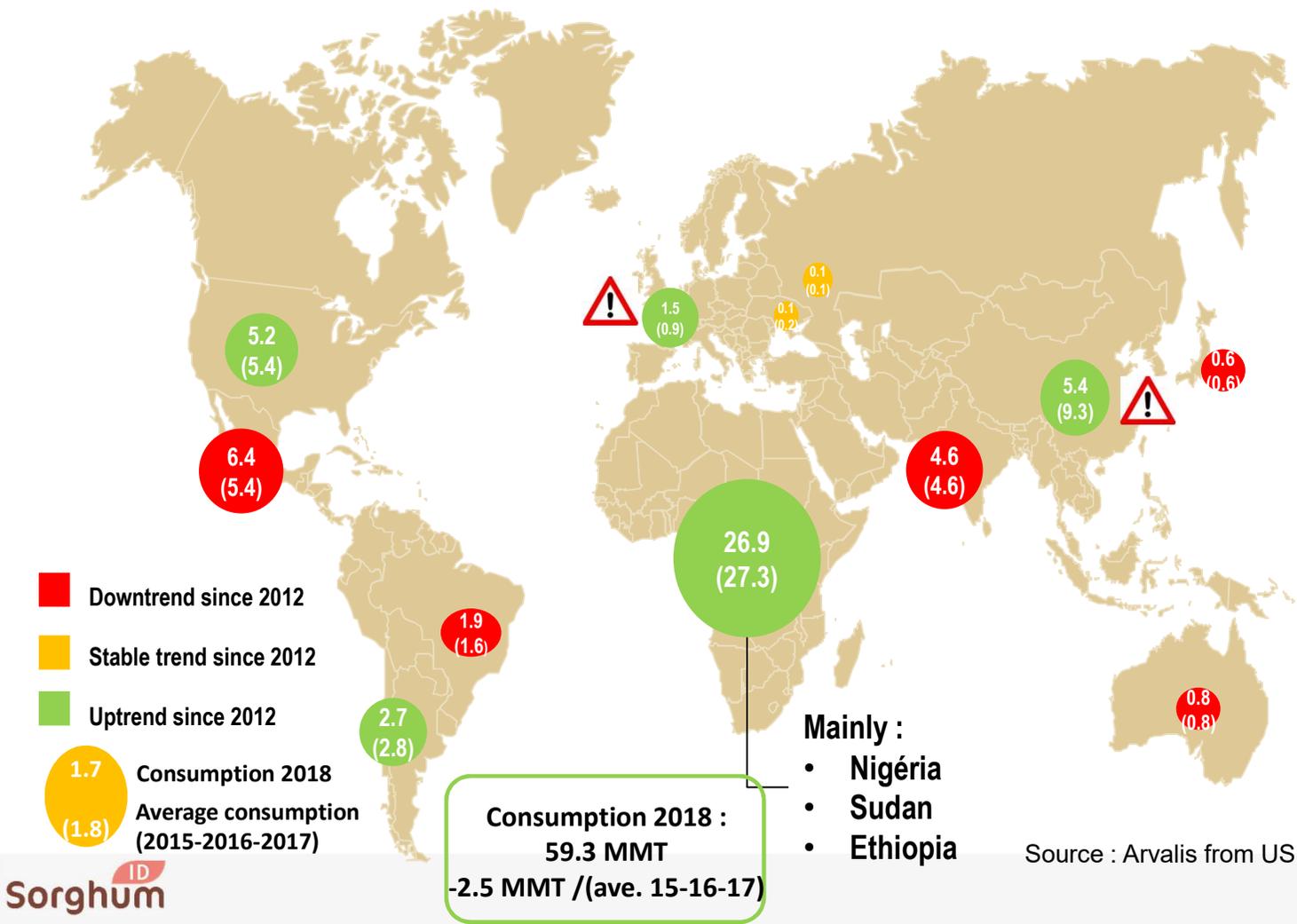
EVOLUTION OF DIFFERENT USES OF SORGHUM GRAINS



- ✓ Food use (flour, grits...), almost half of total sorghum grains use in the world (Sub Saharan Africa, South Asia mainly but increasing in developed countries).
- ✓ Feed use, 40-45% of total uses. Competition with others cereals (corn, barley, wheat) depending on disponibility, prices and political programs ...
- ✓ Industrial uses : Ethanol, brewing, starch. Main users : USA (ethanol – to balance exports) and China (baijiu)

Source : Arvalis from IGC, October 2018

MAIN CONSUMING COUNTRIES

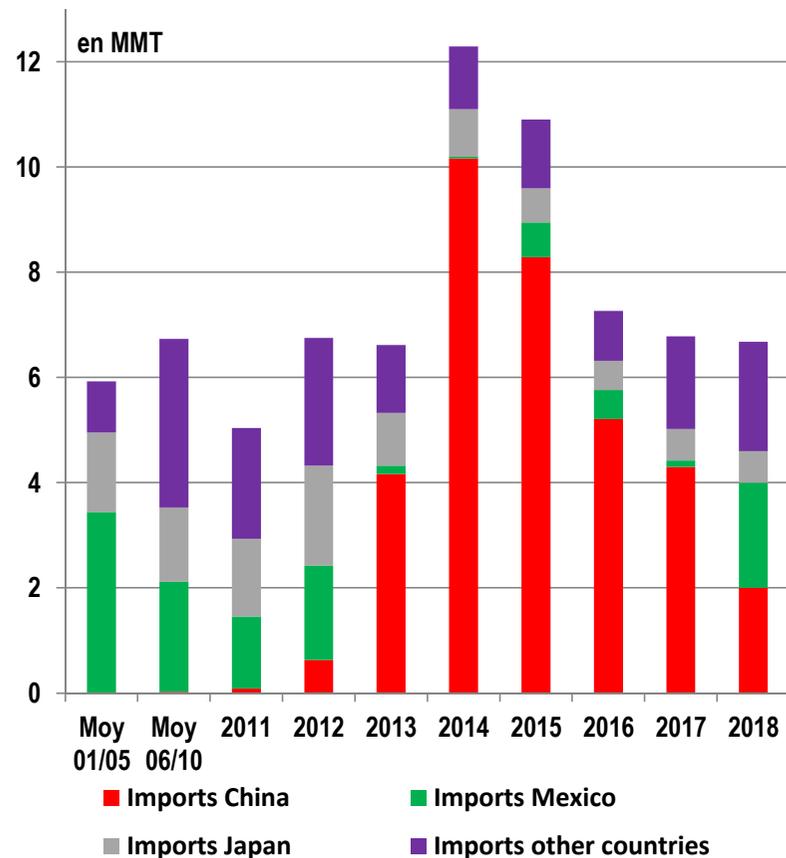


- ✓ Some countries are self sufficient :
 - Sub Saharan Africa, India, Brasil...
- ✓ Some countries need imports :
 - China, Mexico, Japan, EU (?)
- ✓ Some countries export :
 - Usa, Argentina, Australia

Source : Arvalis from USDA, IGC, October 2018

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WORLD TRADE OF SORGHUM GRAIN

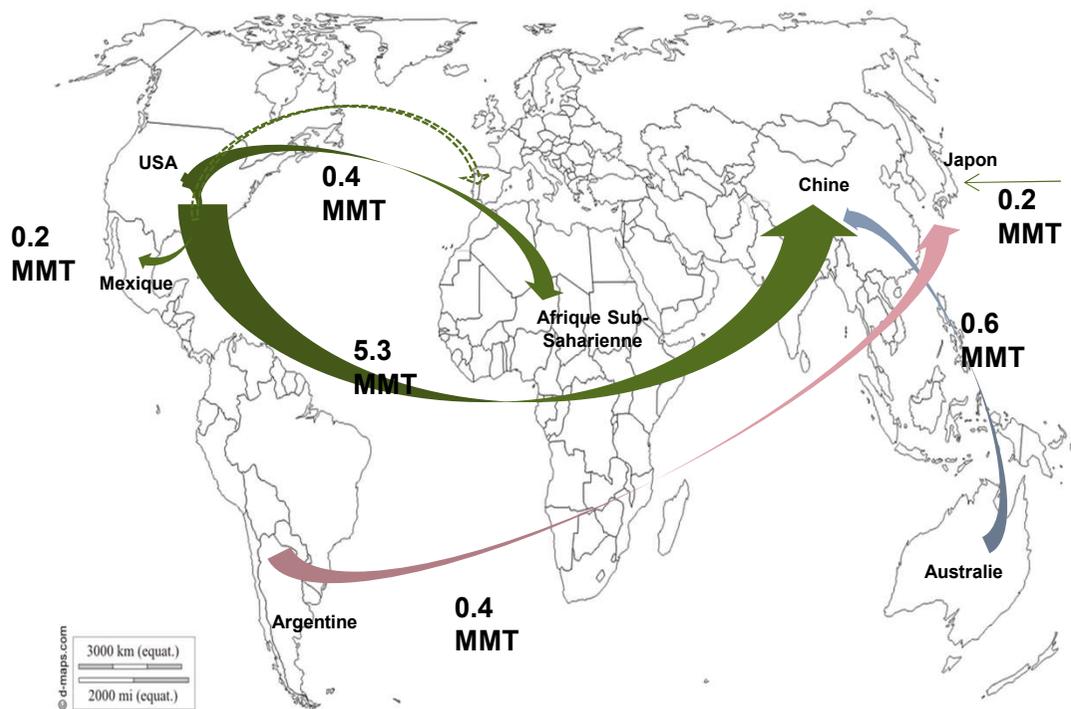


On the last 10 years, several changes in world trade :

- total quantity exchanged : single to double
- new buyers : China but until when?
- drop/variability of historical buyers : Japan, Mexico
- Others countries : EU, Africa...?

Source : Arvalis from USDA, October 2018

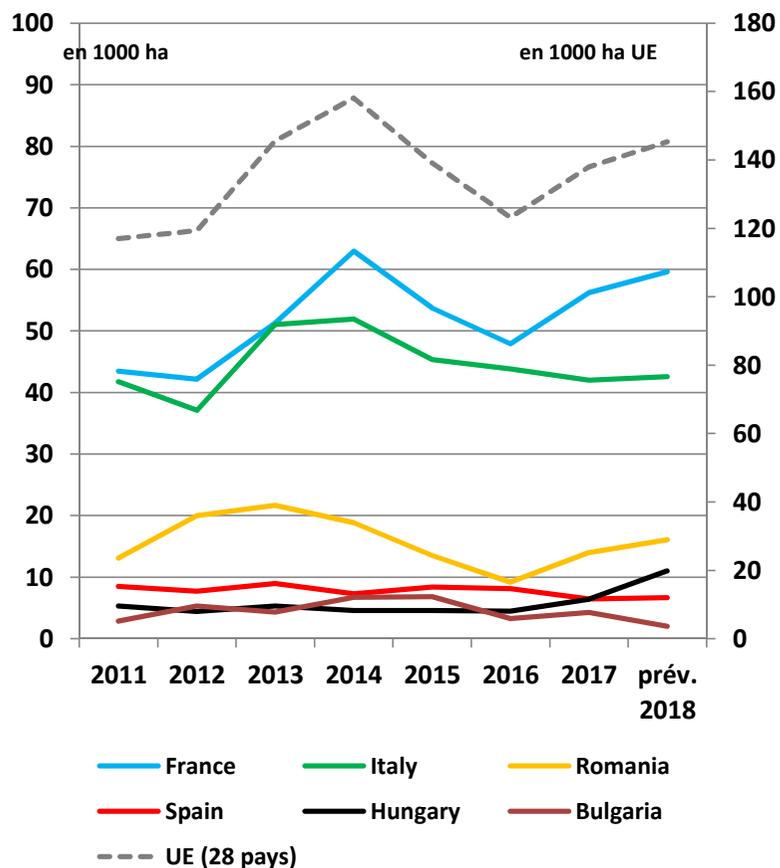
A DOMINATION OF CHINA-US IN SORGHUM TRADE SO FAR, BUT NOW?



Data source : Arvalis from USDA, 2015-2017 average

- ✓ Until last year, world trade was dominated by exchanges between USA and China. But what future with difficult trade relationship between these 2 countries?
- ✓ What modifications on trade road since 2018 spring (trade relations between China & USA)?
- ✓ What impact on US production?

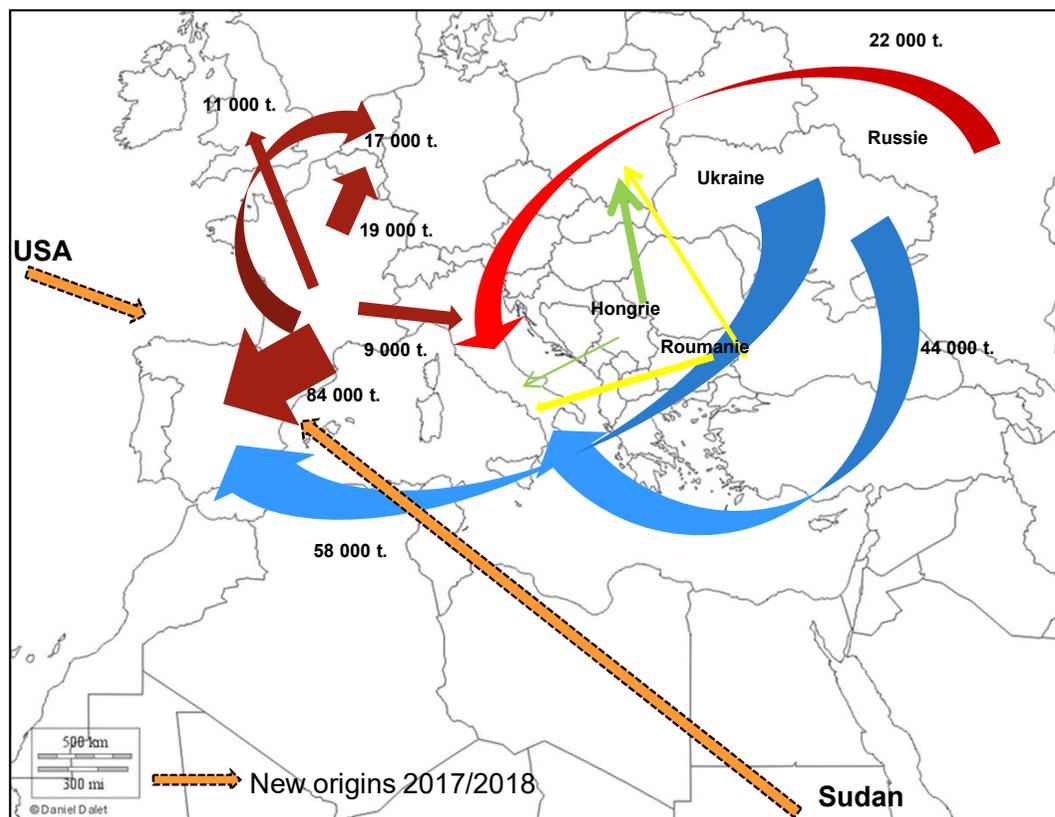
FOCUS ON THE EUROPEAN GRAIN SORGHUM PRODUCTION



- ✓ An EU sorghum acreage between 120 and 160 000 ha
- ✓ France & Italy, 2 leaders of sorghum grains production in the EU. Significant acreage in Black Sea countries (Romania, Bulgaria) without forgetting Ukraine ($\approx 60\ 000$ ha) and Russia ($\approx 200\ 000$ ha)

Data source : Arvalis from Eurostat, October 2018

THE EU SORGHUM GRAIN EXCHANGES



Data source : Arvalis from France AgriMer et Eurostat, 2014-16 exchanges

- ✓ France : the first supplier of its European neighbors
- ✓ Italy and Spain supplied by France but also by Russia (Italy) and Ukraine (Italy and Spain)
- ✓ New suppliers ? USA – Sudan?...
- ✓ Or a bigger share for EU's production !

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Merci

Thanks



Grazie

Спасибо

Source : photothèque Arvalis