



SORGHUM,
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3RD EUROPEAN SORGHUM CONGRESS

WORLD AND EUROPEAN SORGHUM ECONOMICS : SITUATION AND LOOKOUT



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WORLD SORGHUM ECONOMICS : GLOBAL MARKET SITUATION



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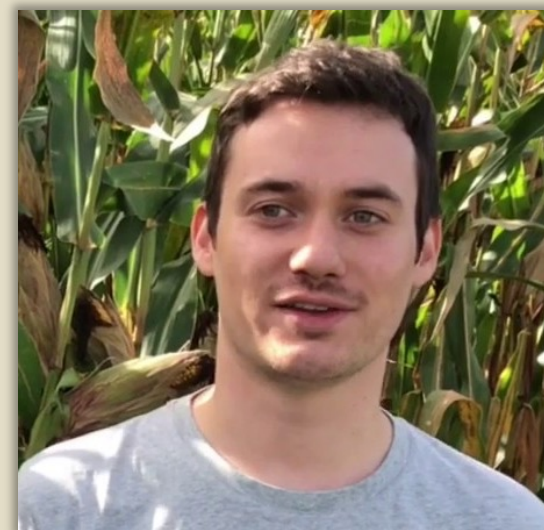


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Arthur Boy

*Economic desk officer
at AGPM*



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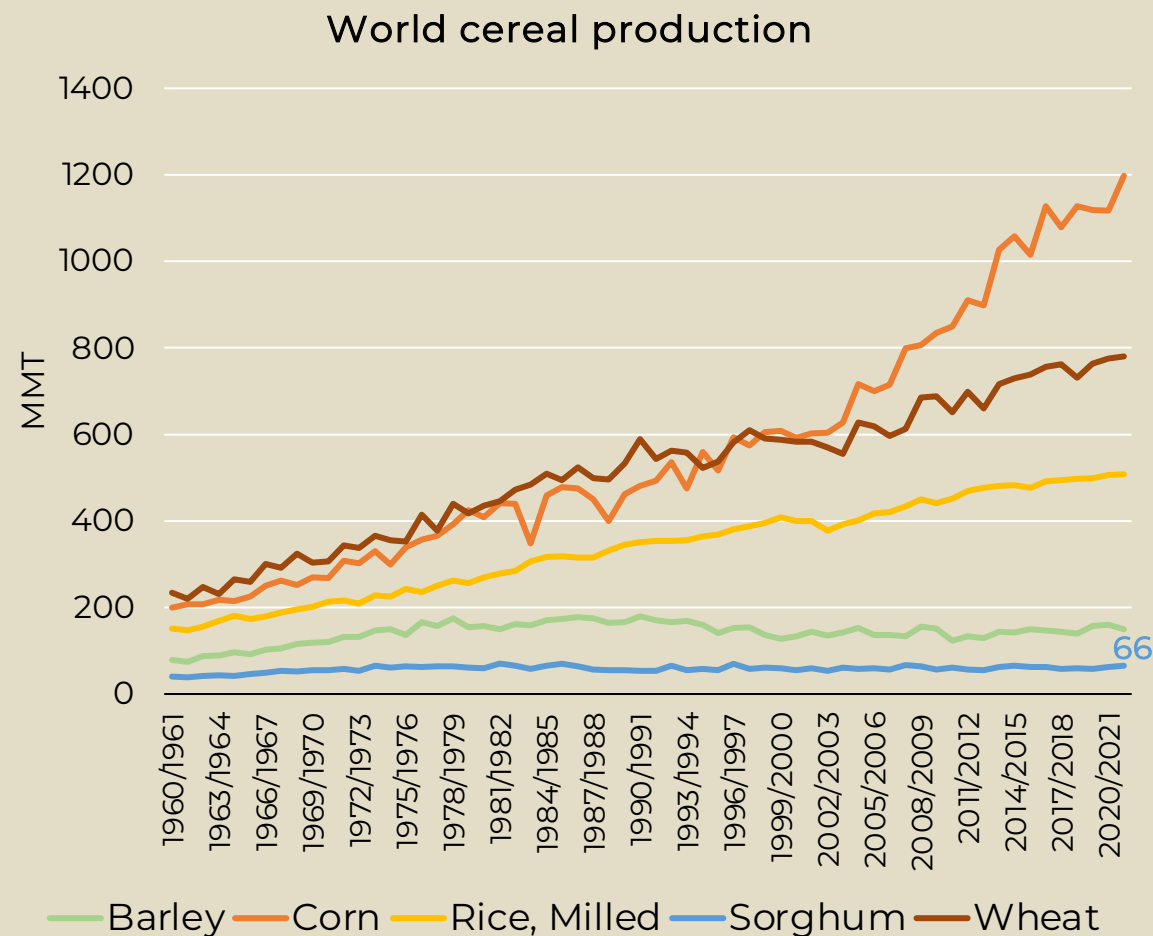
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1. Sorghum is the 5th cereal in the world

Sorghum is the 5th cereal produced in the world after corn, wheat, rice and barley.

Sorghum world's production is relatively steady since the 70s with between 60 MMT and 70 MMT produced each marketing year.



Source : USDA, September 2021



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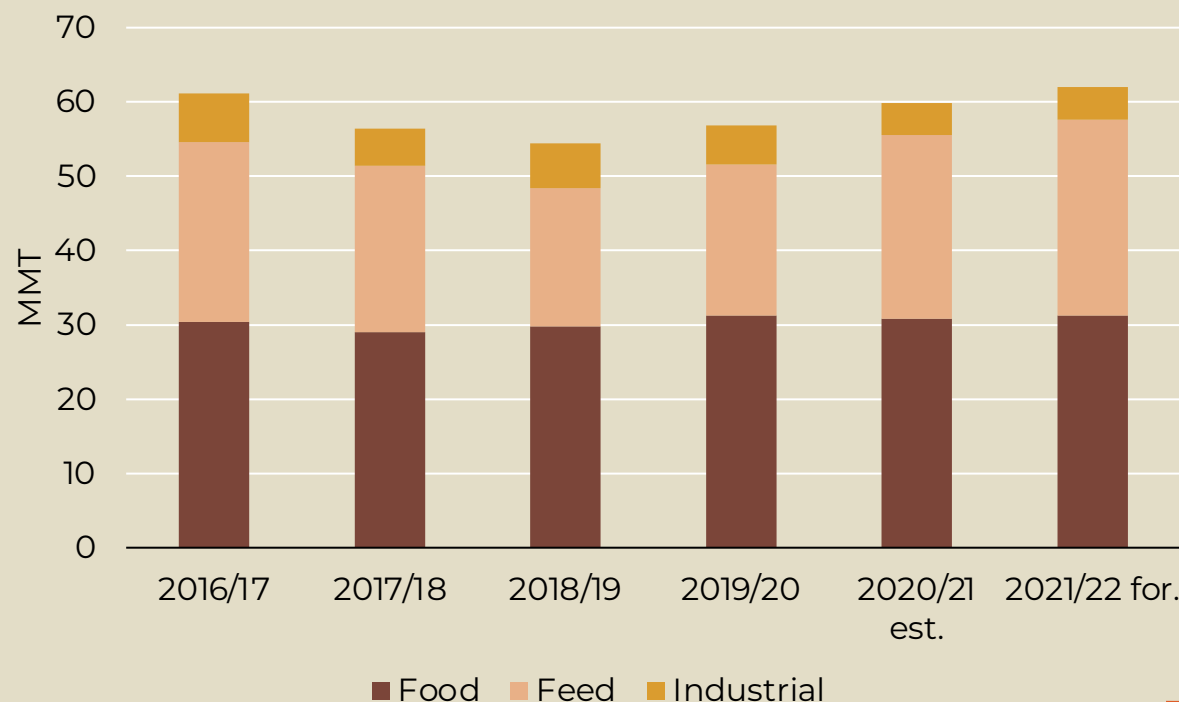
2. World uses for grain sorghum

World sorghum grain main uses :

- Food : around 60%
- Feed : around 40%
- Industrial : around 10%

These last decades, uses for food are growing due to an increase in population in Africa and Asia while industrial and feed uses are steadier and more dependent on cereals prices evolutions.

World uses for grain sorghum



Source : IGC, August 2021



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3. Where is sorghum produced ?

Main sorghum producing regions (2016-2020) and % of total world production

-Africa : ~ 50%

Nigeria, Ethiopia, Sudan...

-North America : 24%

USA, Mexico

-South and East Asia : 13%

China, India

-South America : 9%

Argentina, Brazil

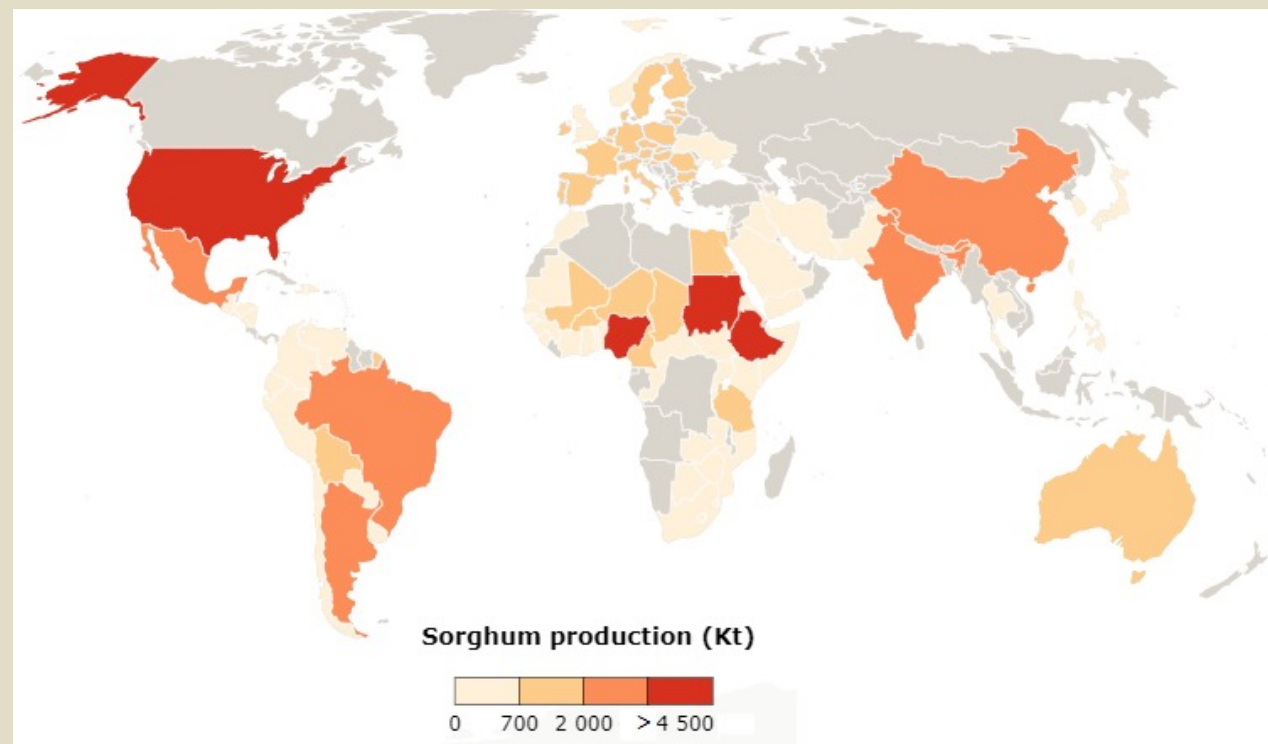
-Europe : 1%

EU (France, Italy), Ukraine

-Oceania : 2%

Australia

Grain sorghum producers (mean 2016-2020)



Source : USDA, September 2021 – AGPM

4. Main trade flows

Share of world imports and exports by region
(mean 2016-2020)

3 main exporters : USA, Argentina, Australia

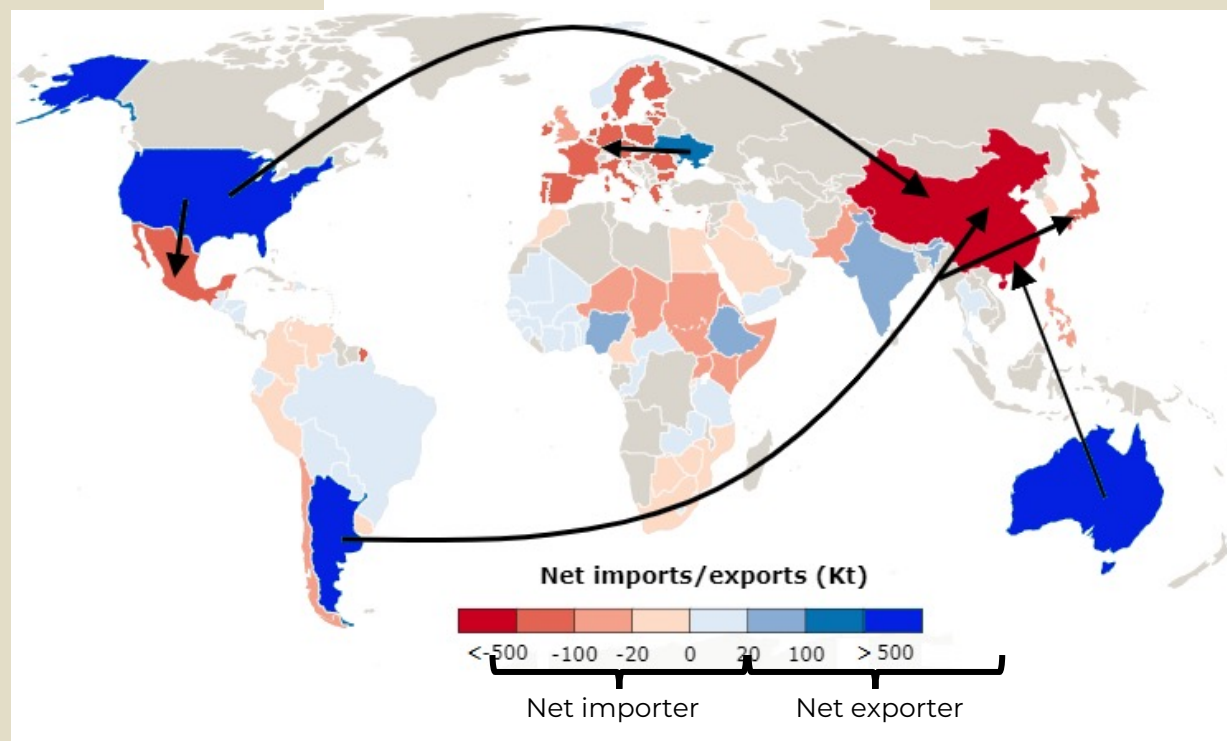
-USA : 70% to 80% of total world exports
Regional exporters : Ukraine, India, Ethiopia...

1 major importer : China

-China : 85% and growing fast
Other important importers : EU (Spain, Italy...),
Mexico, Japan...

Around 8 Mt and 12% of world production
exported each year.

Net trade flows (mean 2016-2020)



Source : USDA, September 2021 – AGPM



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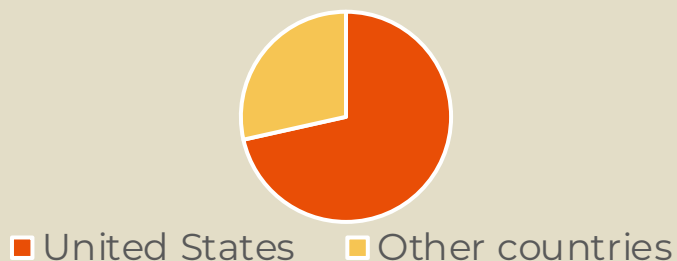
5. The USA : world top exporter

The USA is world's largest sorghum exporter for decades.

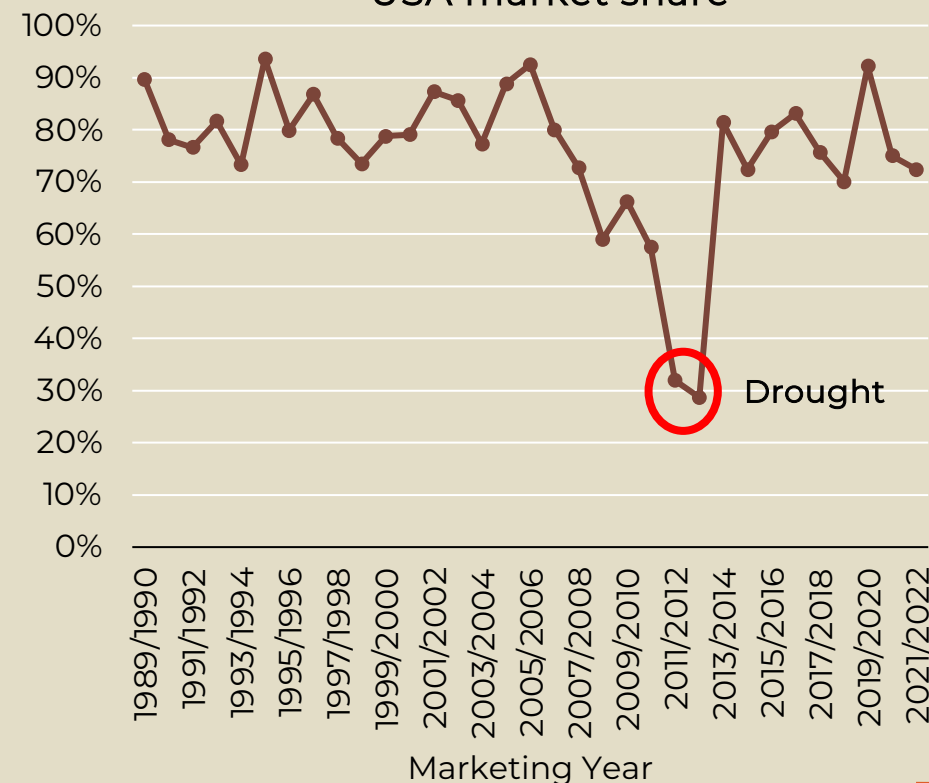
The USA exported on average 5,2 MMT these last 5 marketing years.

USA exports represent on average 70% to 80% of the world sorghum exports.

World sorghum exports for MY 2021/2022



USA market share



Source : USDA, September 2021



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6. China : a new and major sorghum importer

China is a major sorghum importer since 2012/13.

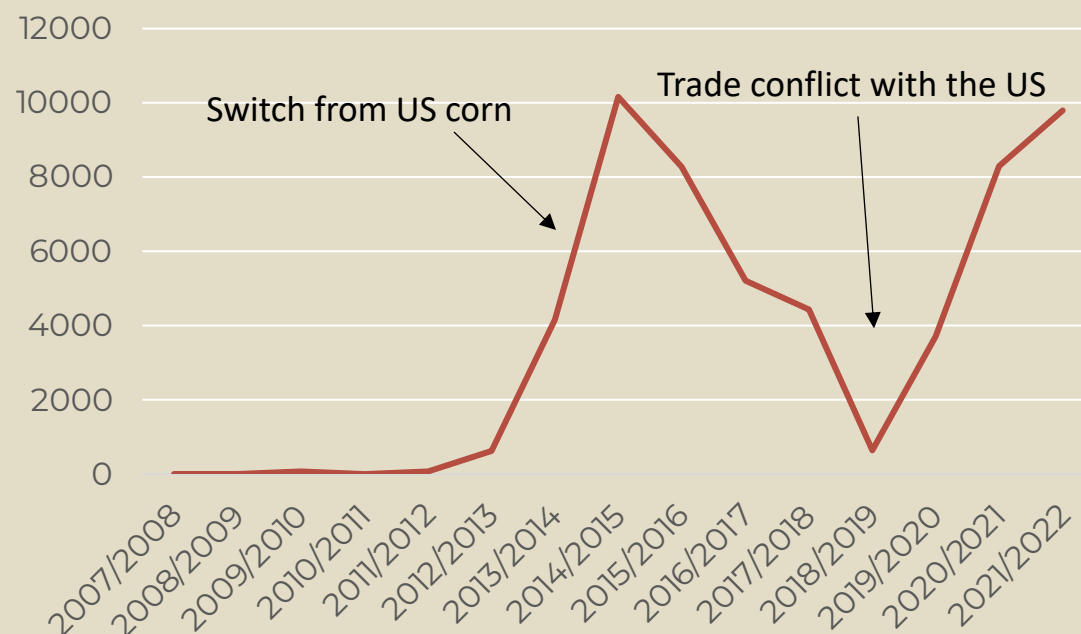
China imported on average 5,4 MMT these last 5 marketing years, making it world's 1st sorghum importer.

China is the USA main buyer. It imports around 80 to 90% of its needs from the USA.

China needs for grain sorghum are growing fast :

- increase in feed demand
- a desire to diversify agricultural supplies and suppliers

China sorghum imports



Source : USDA, September 2021 & IGC, August 2021



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European sorghum market *overview, perspectives and seed supply*



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Pierre Guillaumin

*Market research and
international
development at FNPSMS*



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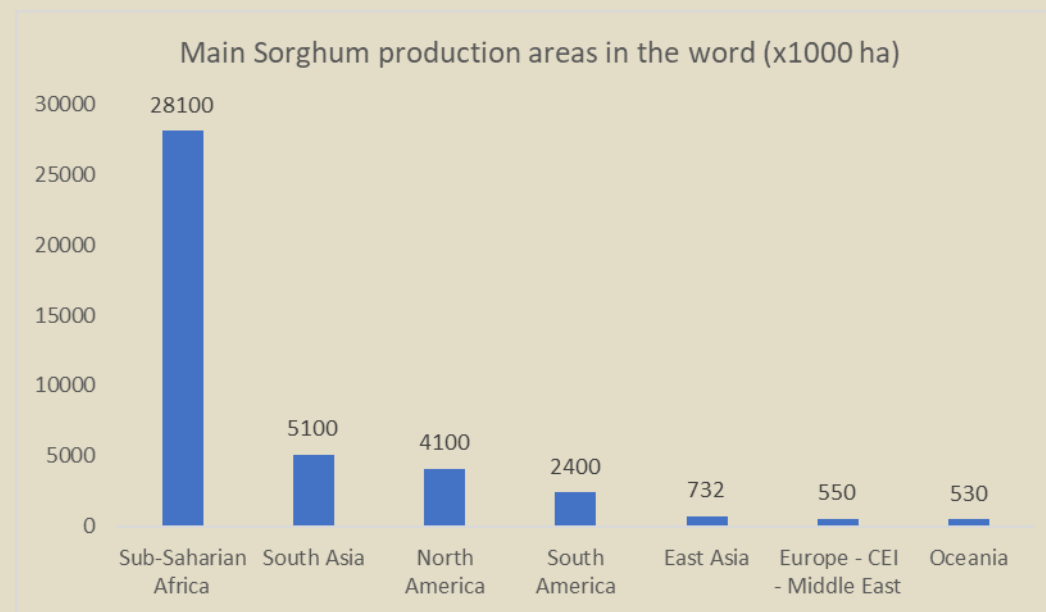
Sorghum in Europe

Still a “niche market”...

~ 550 000 ha in 2021 (Sorghum-ID
Estimate)

60% grain – 40% silage

50% EU – 50% non-EU countries



Source : USDA & Sorghum-ID / FNPSMS



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Sorghum in Europe

... an increasing market

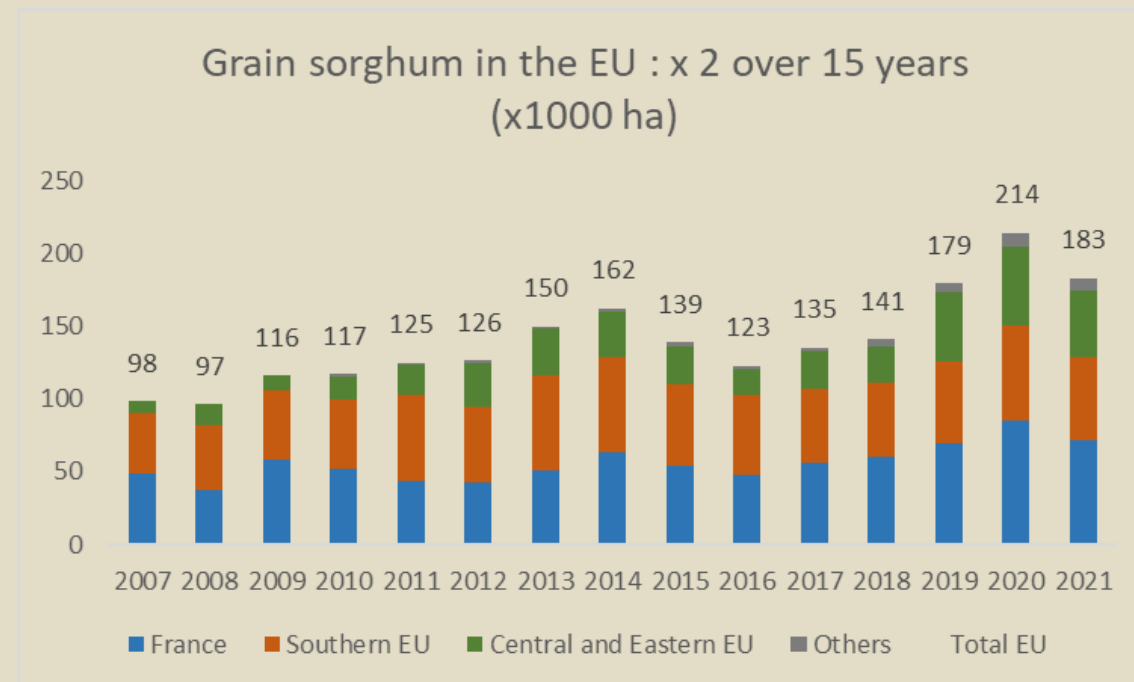
Climate change

Drought tolerance

Crop diversification

Breeding and genetic improvement

Sorghum-ID initiative



Source : Sorghum-ID / FNPSMS



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Grain Sorghum in Europe : 340 000 ha

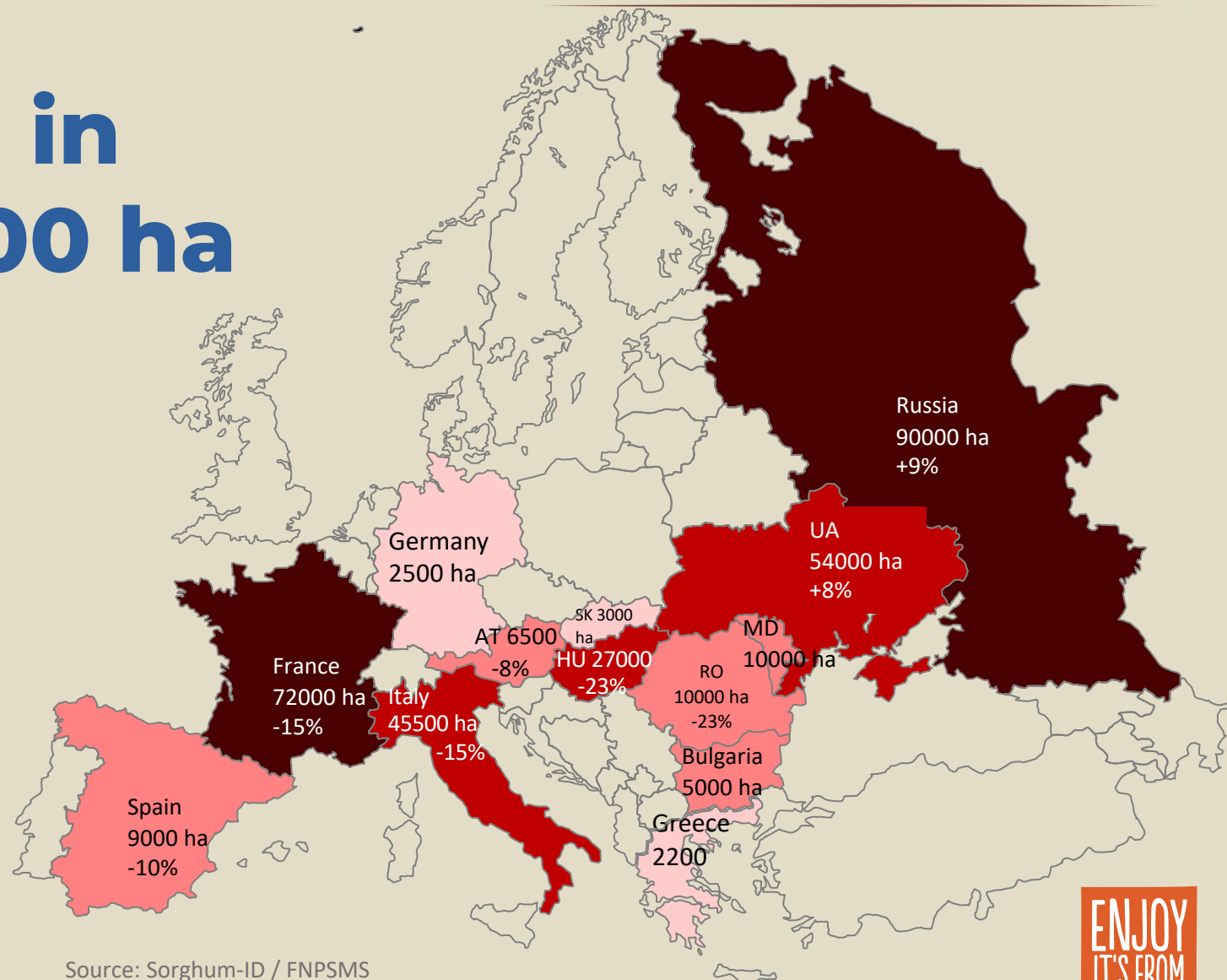
Main producing countries :

In the EU : France, Italy, Hungary

Outside EU : Russia and Ukraine

Trends 2021 : slight decrease in the EU
(but still at a high level)

Balanced by a development of
sorghum in Eastern Europe



Source: Sorghum-ID / FNPSMS



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Silage Sorghum in Europe : 210 000 ha

Main producing countries :

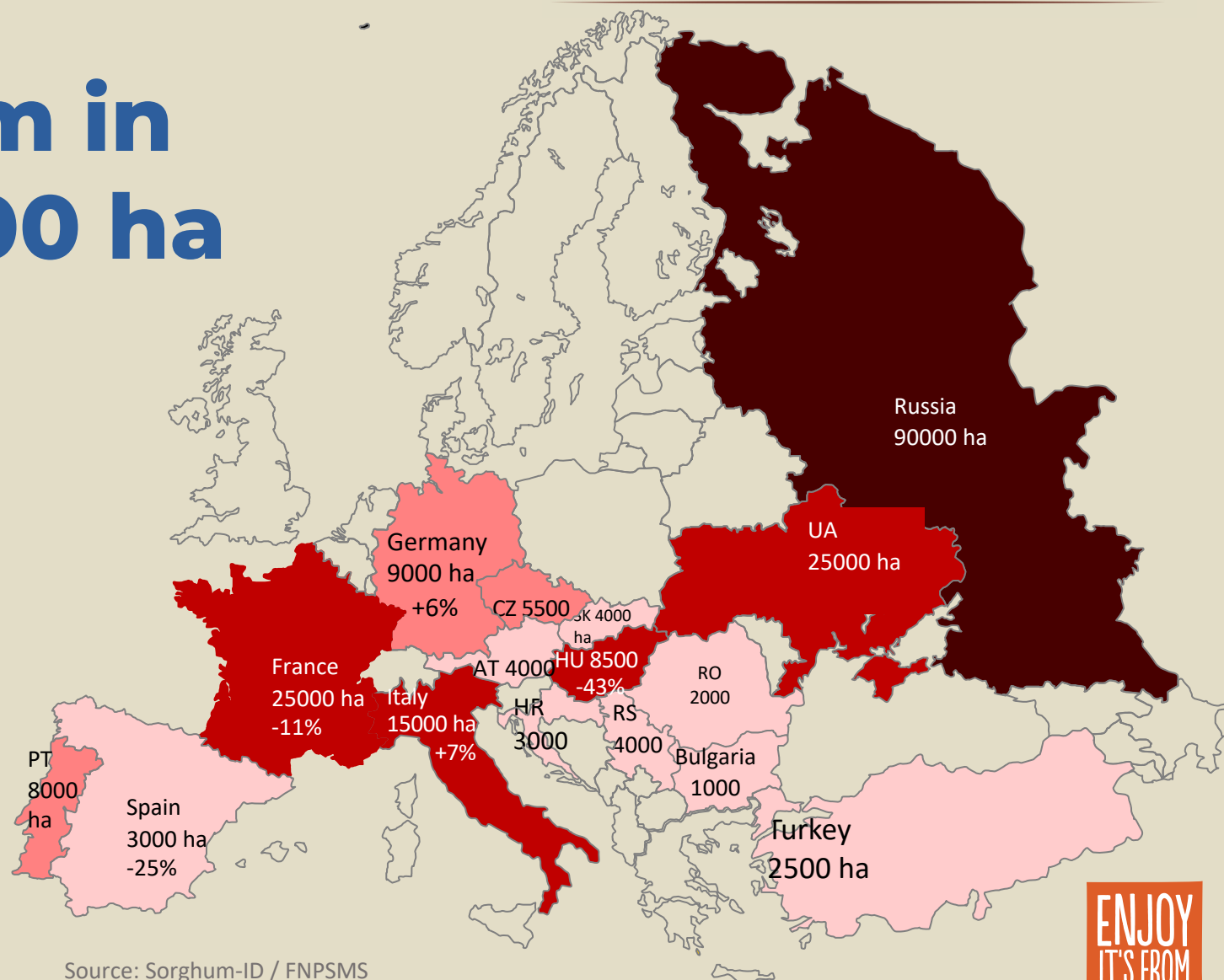
In the EU : France, Italy, Germany, Hungary

Outside EU : Russia, Ukraine, Iran

Uses :

Feed

Biogaz (around 25000 ha in the EU)



Source: Sorghum-ID / FNPSMS



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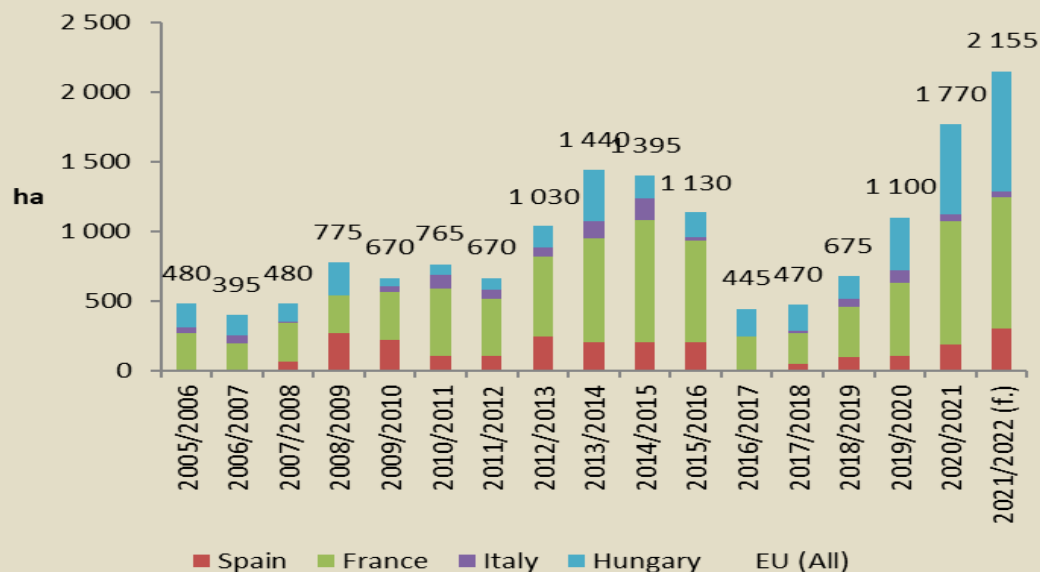
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Seed Sorghum : more than 2000 ha in the EU

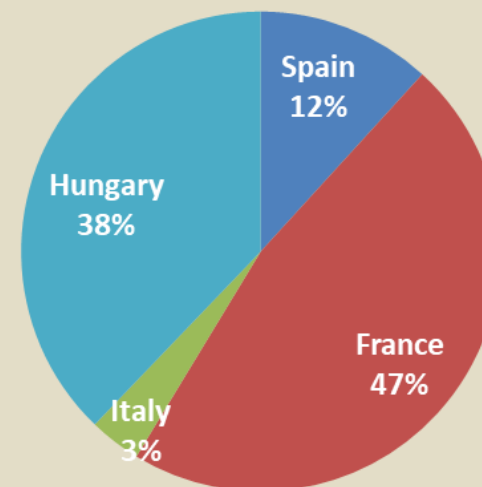
Continuous increase from 2016 to supply the market x 5 in 6 years

Record area 2021 : 2155 ha !

Multiplication area of seed sorghum in the EU



Main sorghum seed producing countries in the EU



Source : FNPSMS &
National Seed Agencies



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France : 1st seed sorghum producer in the EU

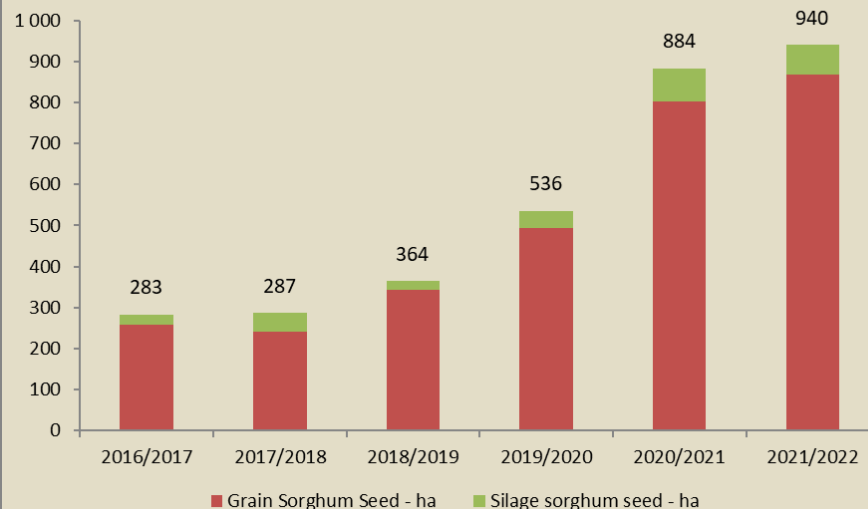
940 ha in 2021

189 seed sorghum growers

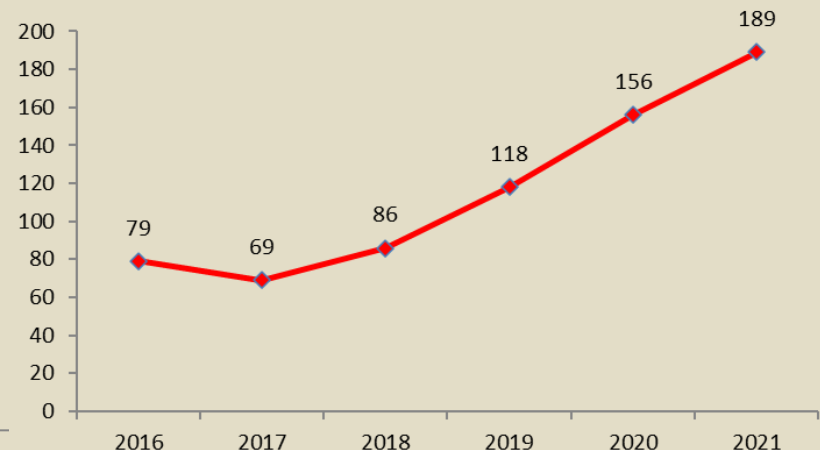
More than 80 varieties produced (350 registered in the EU Catalogue)

Yield : between 2 and 3 T/ha

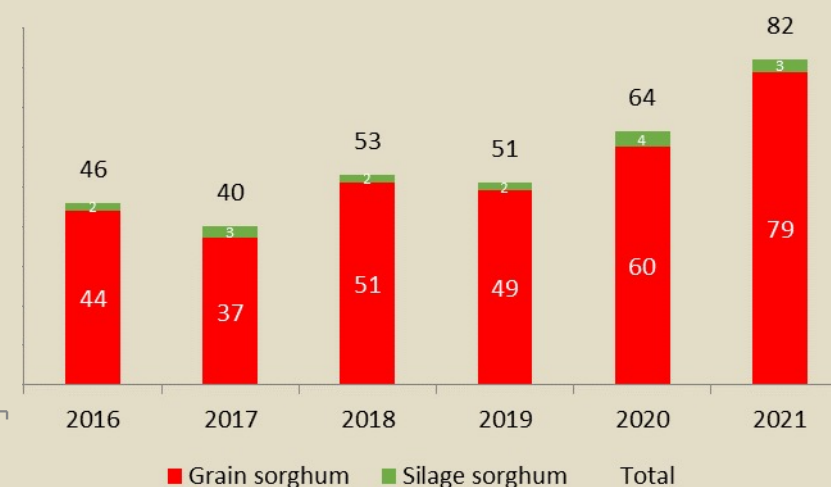
Sorghum Seed multiplication in France (ha)



Number of seed sorghum growers in France



Number of sorghum varieties produced in France



Source : SEMAE



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France : 1st sorghum seed exporter in the EU

~ 1550 T sorghum exported (3 y. average):

46% Southern EU

26% Central and Eastern EU

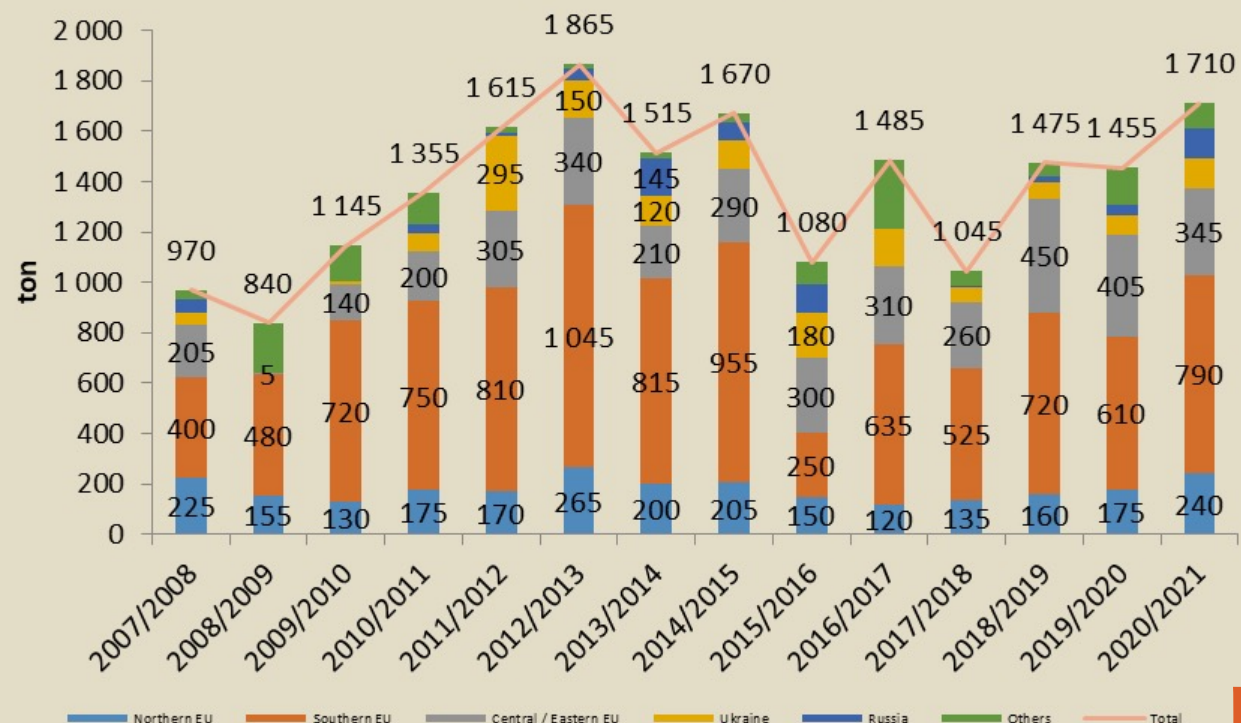
12% Northern EU

10% Ukraine and Russia

6% Others

Increasing trend : +18% in 2021

France's sorghum seed export (T)



Source : SEMAE



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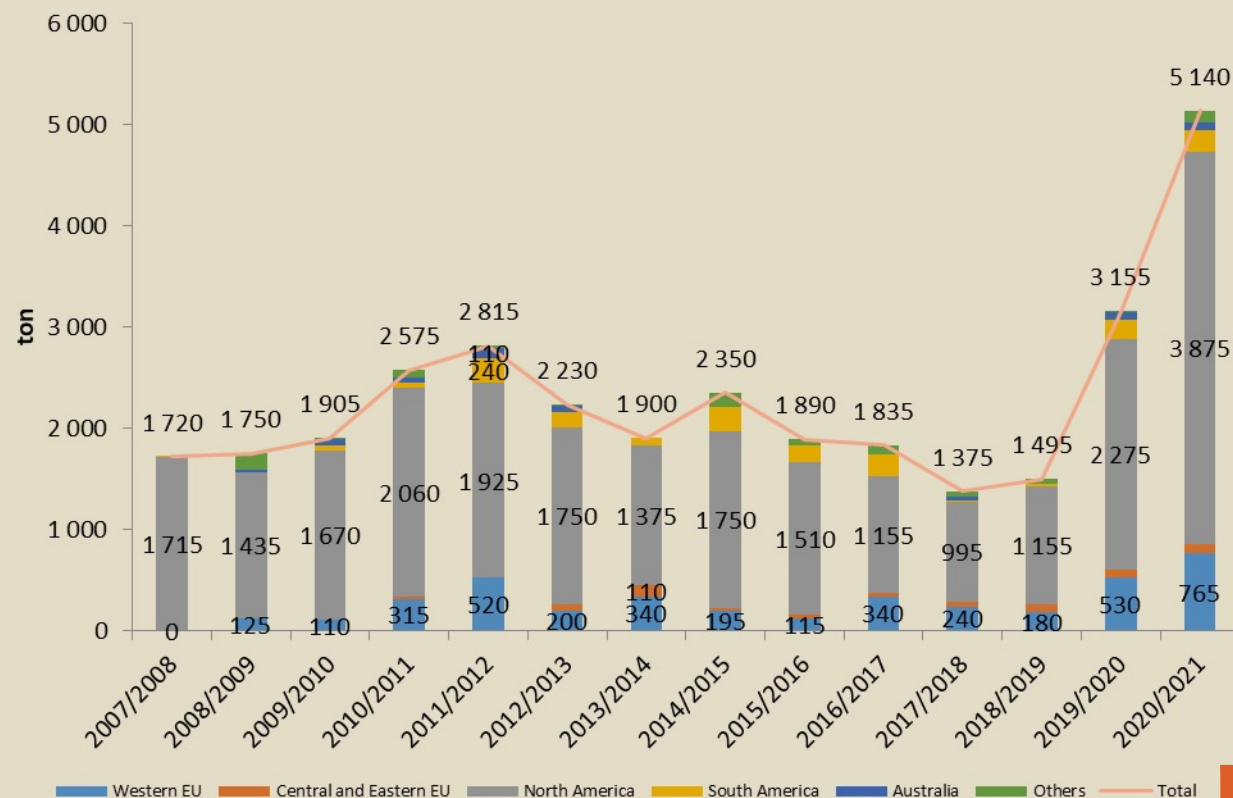
Seed availability : EU still need imports

France's sorghum seed import (T)

5140 T seed sorghum imported in France
for sowing 2021 : +63%

X 3 in 2 years !

75% from North America (USA mainly)



Source : SEMAE



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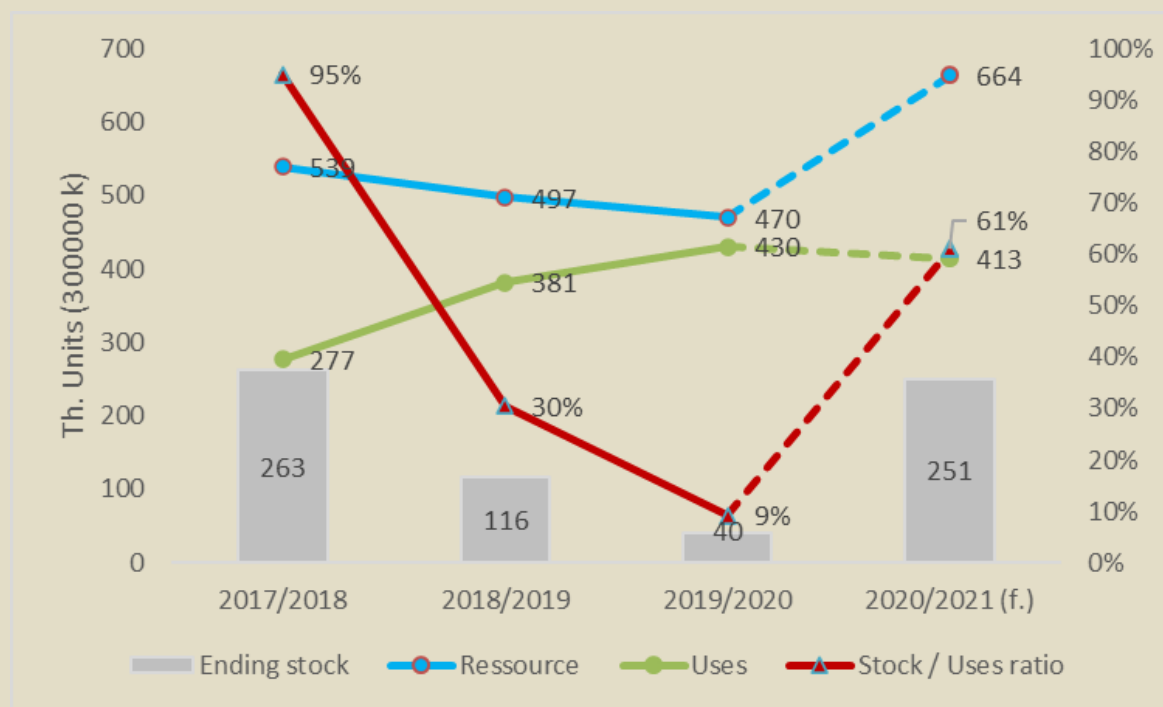
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Quality seed availability : a key point for sorghum development in Europe



Source : FNPSMS

Increasing market means increasing seed demand

Low seed availability to supply the market over the last 3 sowing campaign

But positive signals for upcoming sowing :

- Increasing ressources (multiplication area, yield, imports)
- Slight decrease of uses 2021
- Increasing carry-over and seed availability for sowing in 2022.

