

ROLE OF INTERCÉRÉALES IN FRANCE AND INTERNATIONALLY

Promoting French origin products



- Representation, information and support actions carried out with foreign buyers and users.
- Actions to present the French offer and its characteristics, with the aim of preserving export flows to traditional destinations and developing new markets, whose qualitative requirements are compatible with French origin.
- Privileged interlocutor with state offices of countries in the Maghreb (Algeria, Morocco, Tunisia) and the Middle East, as the institutional representative of the French export sector, via representative offices abroad.
- A decisive role in opening new markets, by highlighting advantages of the French offer compared with those of competitor origins.
- Making the expertise of the French sector available to foreign users and customers through training and technical support, thus optimising the value of French origin products.

Communicating within, and towards, the French cereals sector and public decision-makers

- Communication actions around the needs of foreign customers, their development, and the relative position of the French offer on their markets.
- Sharing knowledge of foreign markets to enable the sector to adapt to the evolving situations of customers and competitors.
- Maintaining close links with the various administrations and public decision-makers concerning the strategic interest of cereal exports for France to develop regulations and infrastructures in France, set up tools to help the export sector, and support the sector in its promotional work on international markets.



To enhance the reach of French cereals abroad, Interceréales has five permanent offices around the world

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FRENCH CEREALS FOR WORLD MARKETS



WHAT IS INTERCÉRÉALES?



Intercéréales, a private non-profit association, is the interprofessional organisation representing cereals in France. These comprise **amaranth, barley, buckwheat, canary grass, chia, corn (maize), durum wheat, meslin, millet, milling wheat, oats, quinoa, rice, rye, sorghum, spelt, triticale** and **tritordeum**, and related cereal products.

Created on the initiative of the professional organisations representing the cereals sector, we bring together all the major players from across the industry: production, collection/marketing and first-line processing. Intercéréales is a forum for exchange between these organisations, which work together to develop the cereals sector in France, and to internationally promote French excellence in the sector and the high quality of France's cereals production and products.

The 14 members of Intercéréales are the national professional organisations, representing production, collection and marketing, and first-line processing. These "professional families" are grouped into three colleges:

- Production college**
 - AGPB: General Association of Wheat Producers
 - AGPM: General Association of Maize Producers
 - FGC: Union of French Grain and Oilseed Producers
- Collection and Marketing college**
 - National Grouping of French Grain Cooperatives
 - FNA: Federation of Agricultural Traders
 - SYMEX: French Union of Export Millers
 - SYNACOMEX: National Union of Foreign Trade in Cereals
- Transformation college**
 - ANMF: National Association of French Millers
 - CFSI: French Semolina Industry Committee
 - National Grouping of French Animal Feed Cooperatives
 - SNIA: National Union of French Animal Feed Industry
 - French Malt Industry Association
 - USIPA: Grouping of Unions of French Producers of Starch and Starch Products
 - USM: Union of French Maize Semolina Producers



A truly collective tool at the service of the sector and its members

Intercéréales' objective is to develop the cereals industry in France, for the benefit of all the sector's different participants. Its principal work strands are:

- Research and development to improve the competitiveness of farms, to help them adapt to market needs, environmental imperatives, and climate challenges.
- Promotion of the excellence of the sector's savoir-faire, and of French cereals and cereal products, both in France and abroad (EU and non-EU countries).
- Implementation of a range of projects across the sector to identify and promote actions of sector-wide importance (quality, best practice, competitiveness, sustainability, etc.).

FRENCH CEREALS FOR WORLD MARKETS



EUROPEAN UNION (EU)

- Largest export destination for French cereals and cereal products (malt, durum wheat semolina, corn semolina, starch, flour, etc.)
- Almost all French corn exports, which are used for animal feeds and industrial purposes
- Between 40% and 50% of French wheat exports, depending on year
- Main market for French malting barley



MAGHREB AND SUB-SAHARIAN AFRICA

- Algeria and Morocco: largest non-EU export destinations for French wheat
- 20 Mt of wheat consumed each year in Maghreb countries. France is their largest milling wheat supplier
- Consumption amongst the highest in world (>180Kg/inhabitant/year)
- Imports needed to cover 60% of wheat requirement
- Local bread-making process is close to French model
- French wheat also very present in Francophone West African countries, particularly Senegal, Côte d'Ivoire, Cameroon and Mali
- These countries also import French corn (maize) and barley for animal feed purposes



CHINA

- World's largest producer and consumer of wheat
- It imports different grades of wheat according to need, with France a regular supplier
- World's biggest producer and consumer of beer
- Main buyer of French malting barley outside EU

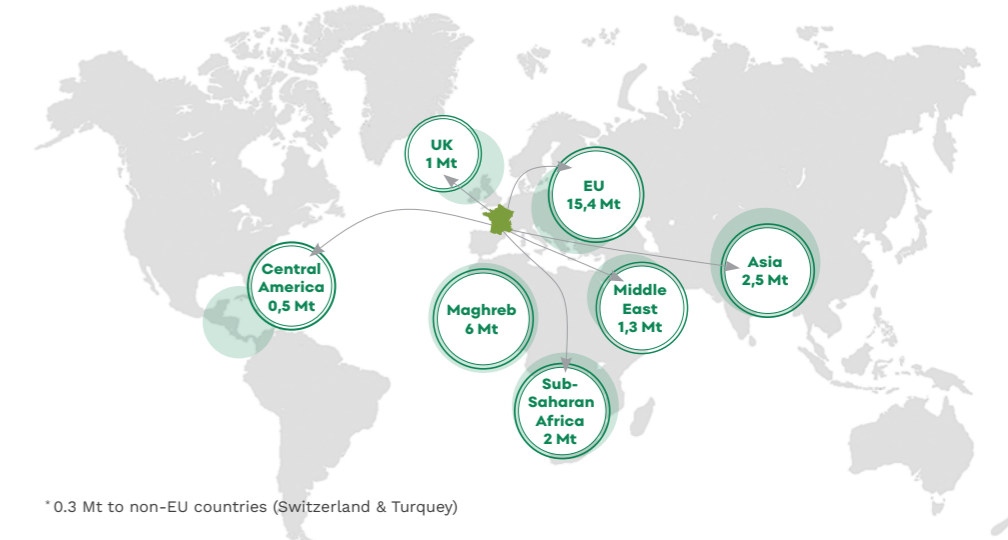


MIDDLE EAST

- 400 million inhabitants from Egypt to Libya and Iran, via the Arabian Peninsula
- Birthplace of wheat, which constitutes major part of diet (notably in the form of flat breads)
- A structural and durable importing region, including the world's largest wheat buyers
- Egypt: imports close to 12 Mt each year
- Region includes the world's largest importers of feed barley (Saudi Arabia, Iran, Jordan)
- France is one of the major suppliers of milling wheat and feed barley

WHERE DO FRENCH CEREALS GO?

29 million tonnes* worth 5.9 billion euros annually (5-year average for marketing years 2017/2018 to 2021/2022)



France is a cereal-growing country with renowned production both in terms of quantity and quality, meaning it is self-sufficient in terms of food security. The French cereal industry exports almost one out of every two tonnes harvested, and a significant proportion of its transformed cereal products.

The excellence of the French cereals sector's savoir-faire combined with the efficiency of its associated infrastructures enable France to meet the multiple needs of buyers. From varietal research to supply chain optimisation, whilst maintaining compliance with stringent sanitary requirements, the French sector is constantly evolving. It is recognised as a key player in international grain trade. Cereals and cereal products constitute the second largest item in France's agri-food trade surplus (+7 billion euros – trade balance in 2021).



- 1** • Europe's largest milling wheat producer
- Europe's largest starch producer
- World's largest exporter of malt and corn (maize) seed
- 2** • Europe's second largest producer of corn (maize)
- Europe's second largest producer of flour
- World's second largest barley producer
- 5** • World's 5th largest exporter of milling wheat
- 7** • World's 7th largest exporter of cereals