



Le marché potentiel des grains bio aux États-Unis



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marchés.

**Journées horticoles
et grandes cultures**

7 Décembre 2017

An aerial view of a supermarket's produce section. The aisles are filled with various fruits and vegetables, including apples, oranges, and leafy greens. Several customers are seen shopping, and a shopping cart is visible. A large, stylized orange and white text overlay reads "5,3%".

5,3%

1%

Plan de la présentation

- 1. Offre aux États-Unis**
- 2. Importations américaines**
- 3. Comparaisons des prix**
- 4. Autres défis**



1. Offre aux États-Unis



1. Offre du maïs

Maïs	Superficies récoltées (ha)	Rendements (t/ha)	Production (t)	Valeur (\$ US)
2008	58 045	6,87	398 856	111 389 103
2011	54 583	6,63	361 669	101 482 432
2014	67 911	6,95	472 199	154 895 737
2015	67 518	6,95	469 119	129 066 601
2016	86 576	7,50	649 330	163 877 756



1. Offre du soya

Soya	Superficies récoltées (ha)	Rendements (t/ha)	Production (t)	Valeur (\$ US)
2008	39 705	1,77	70 175	50 183 982
2011	38 882	2,03	78 793	49 410 409
2014	39 996	2,21	88 405	71 530 054
2015	38 381	2,26	86 636	62 542 902
2016	50 420	2,48	125 255	78 490 532



1. Ratio de l'offre américaine

Maïs

Soya



54,1 %

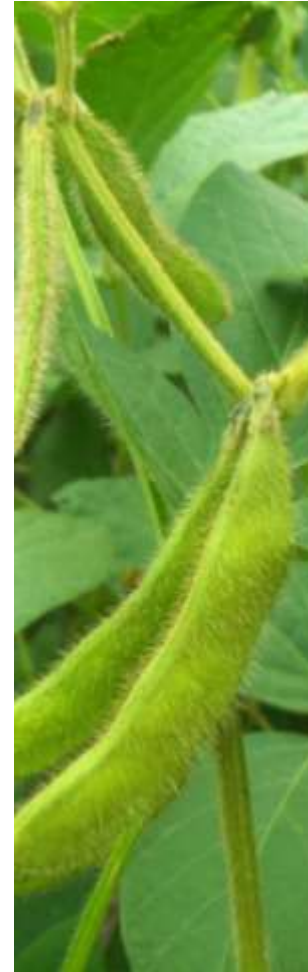
25 %



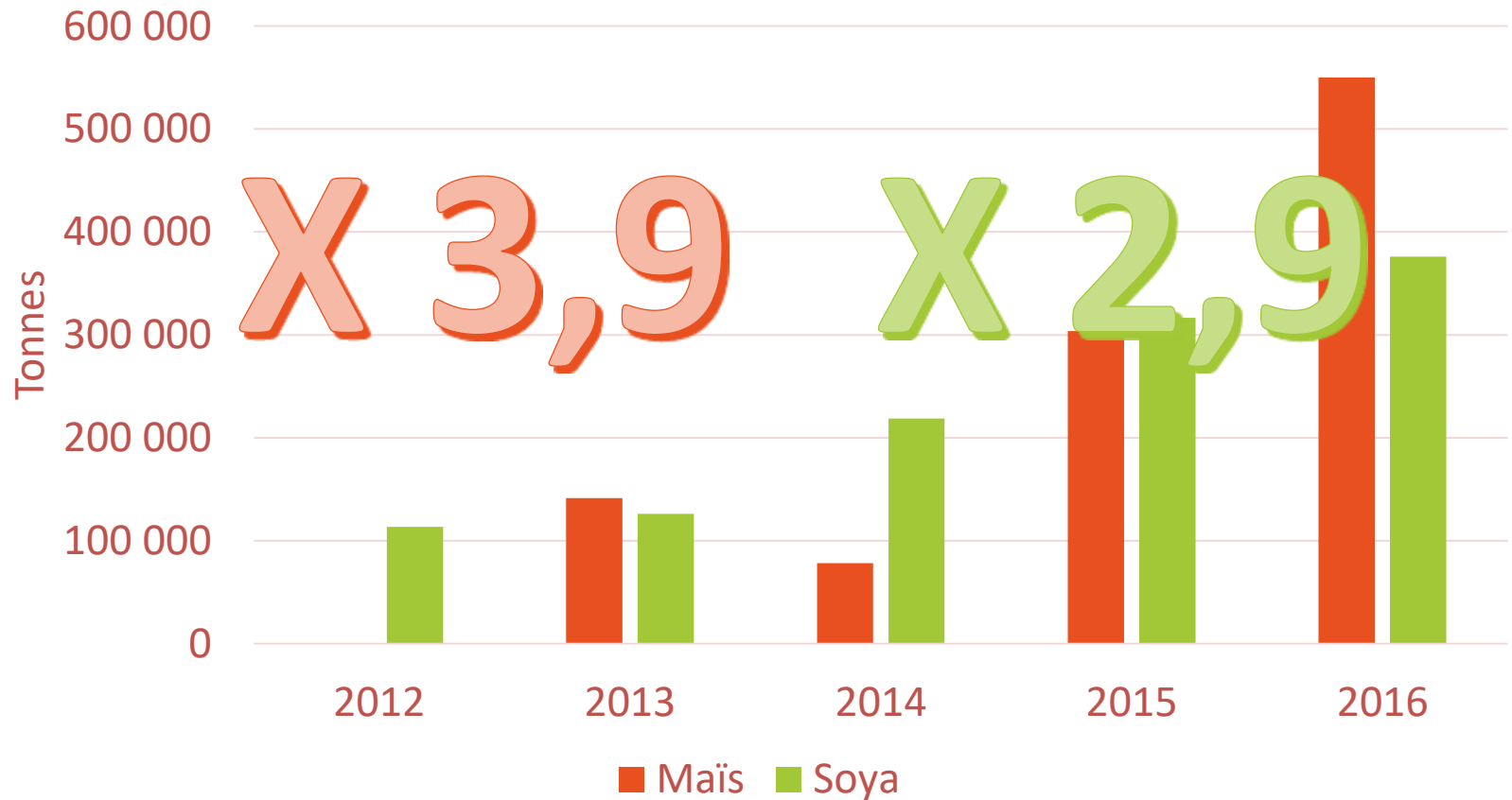
45,9 %

75 %

2. Importations américaines

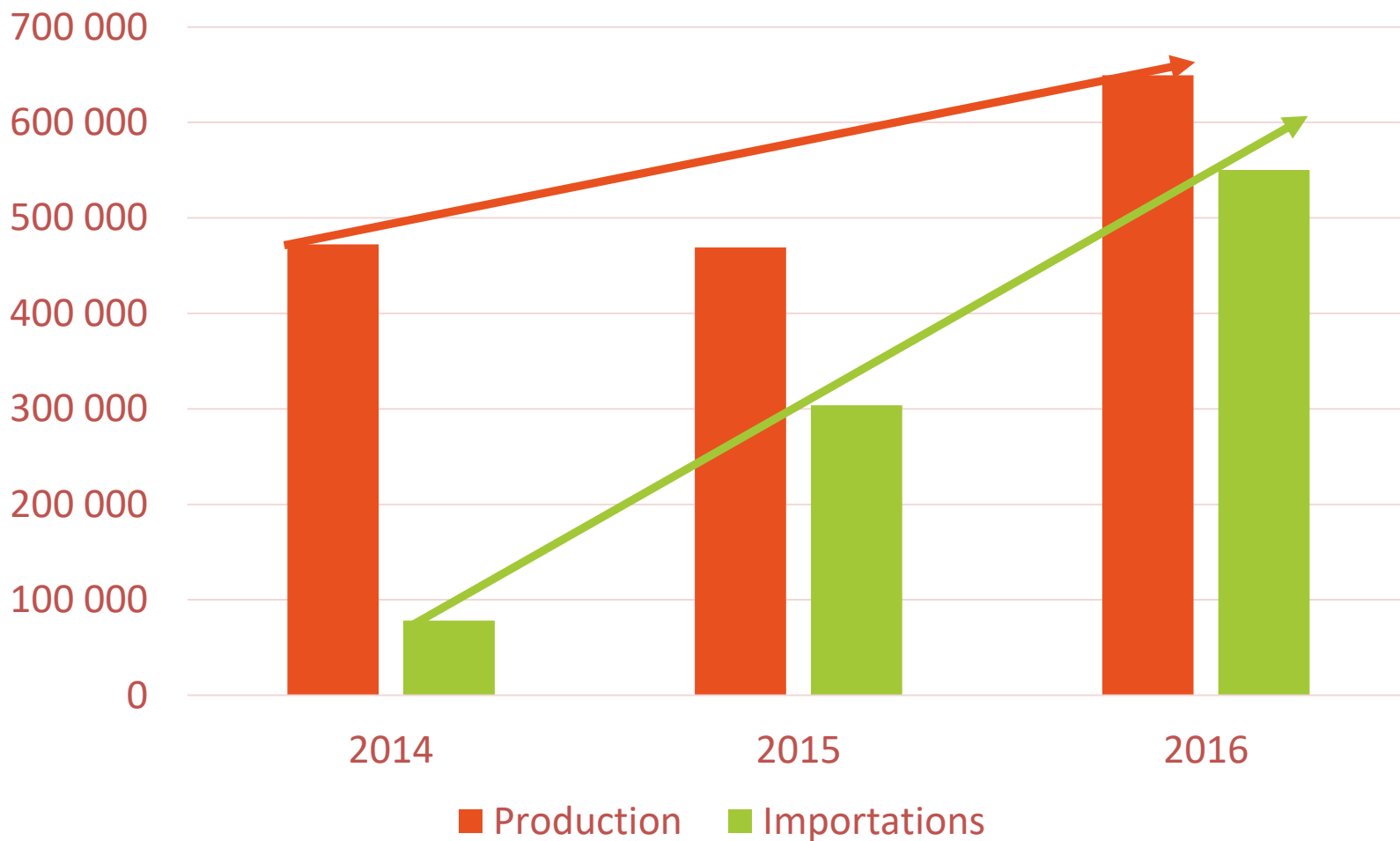


2. Importations



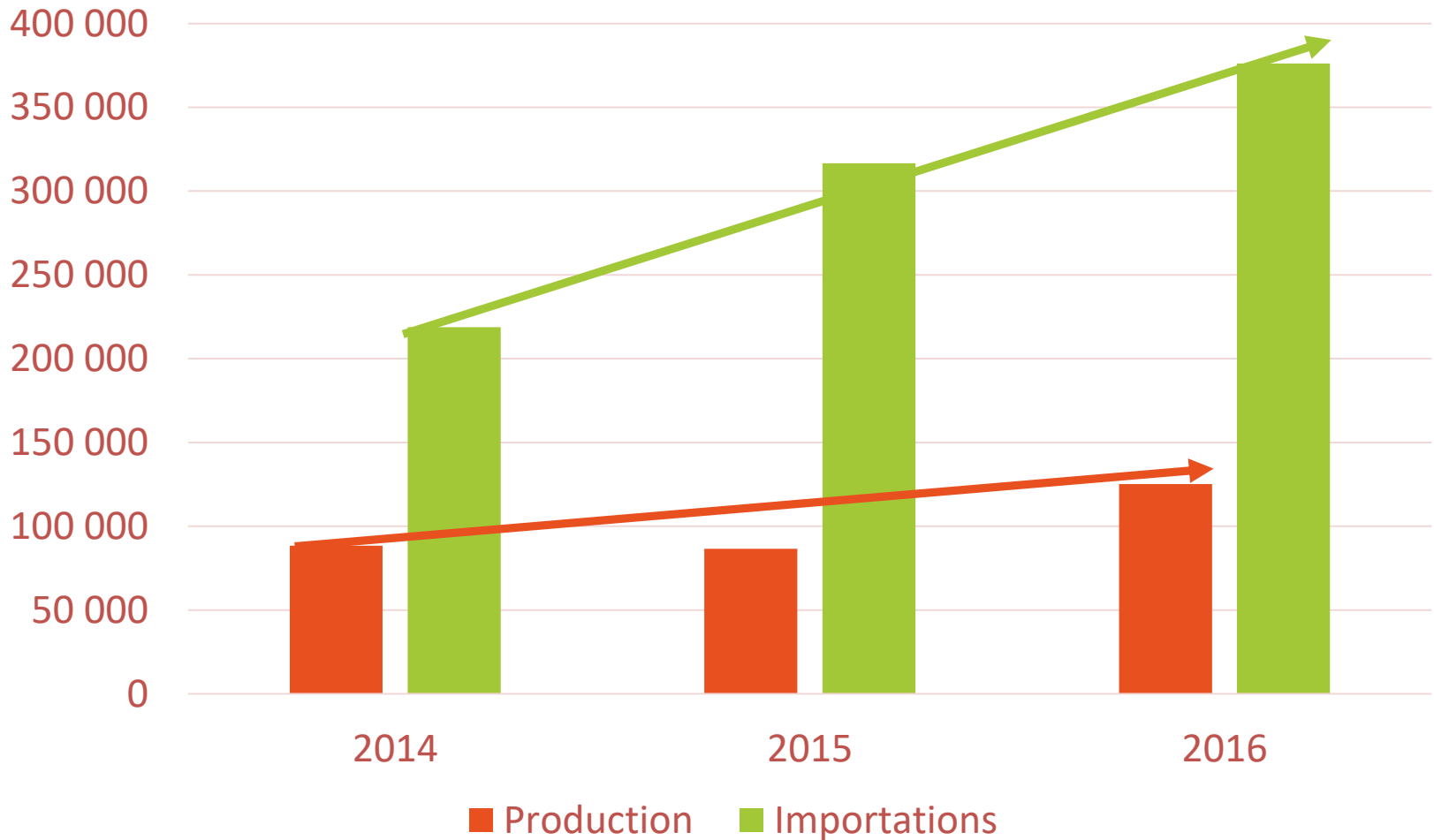
Source : USDA - FAS

2. Production vs importations - Maïs



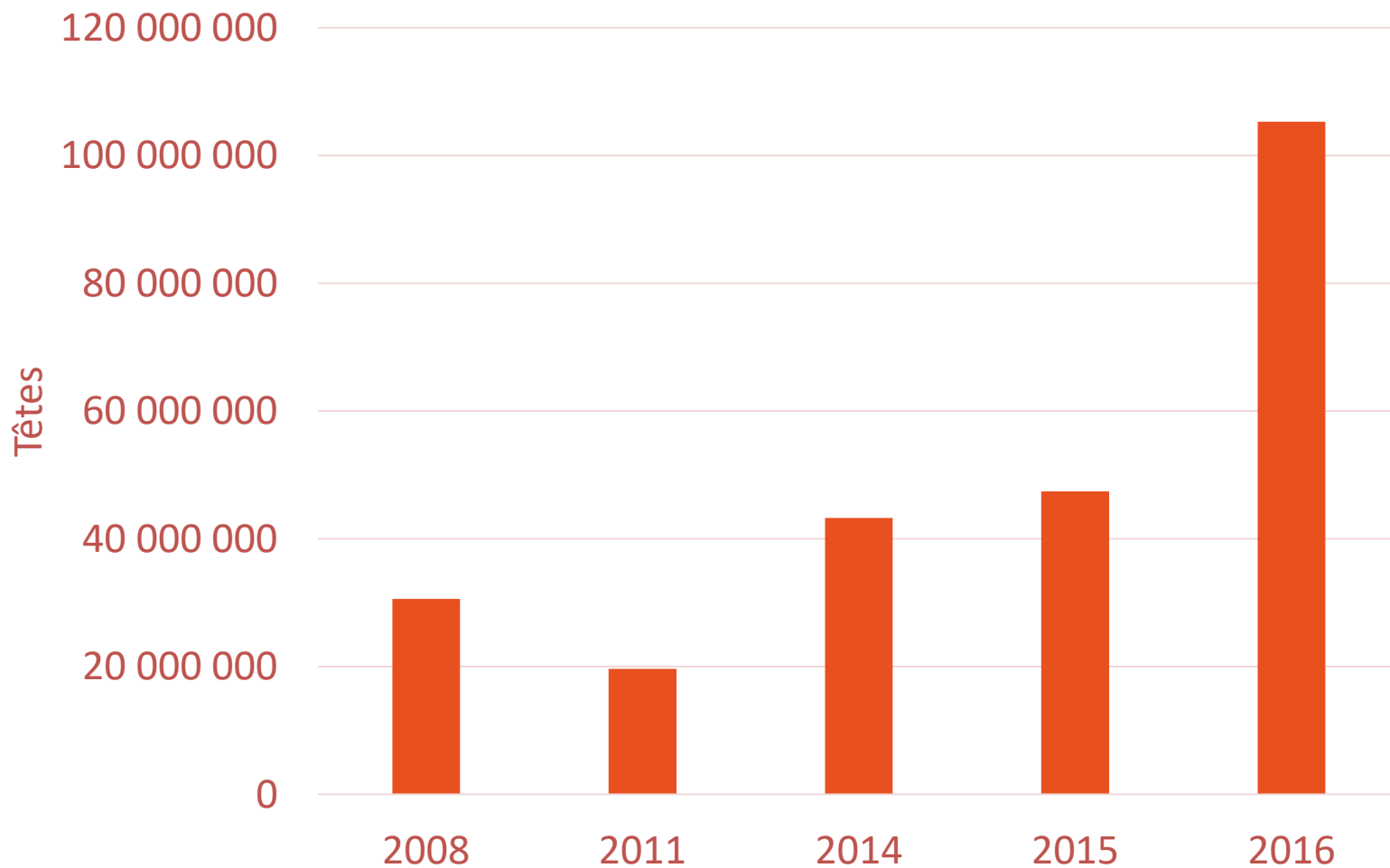
Source : USDA - FAS

2. Production vs importations - Soya



Source : USDA - FAS

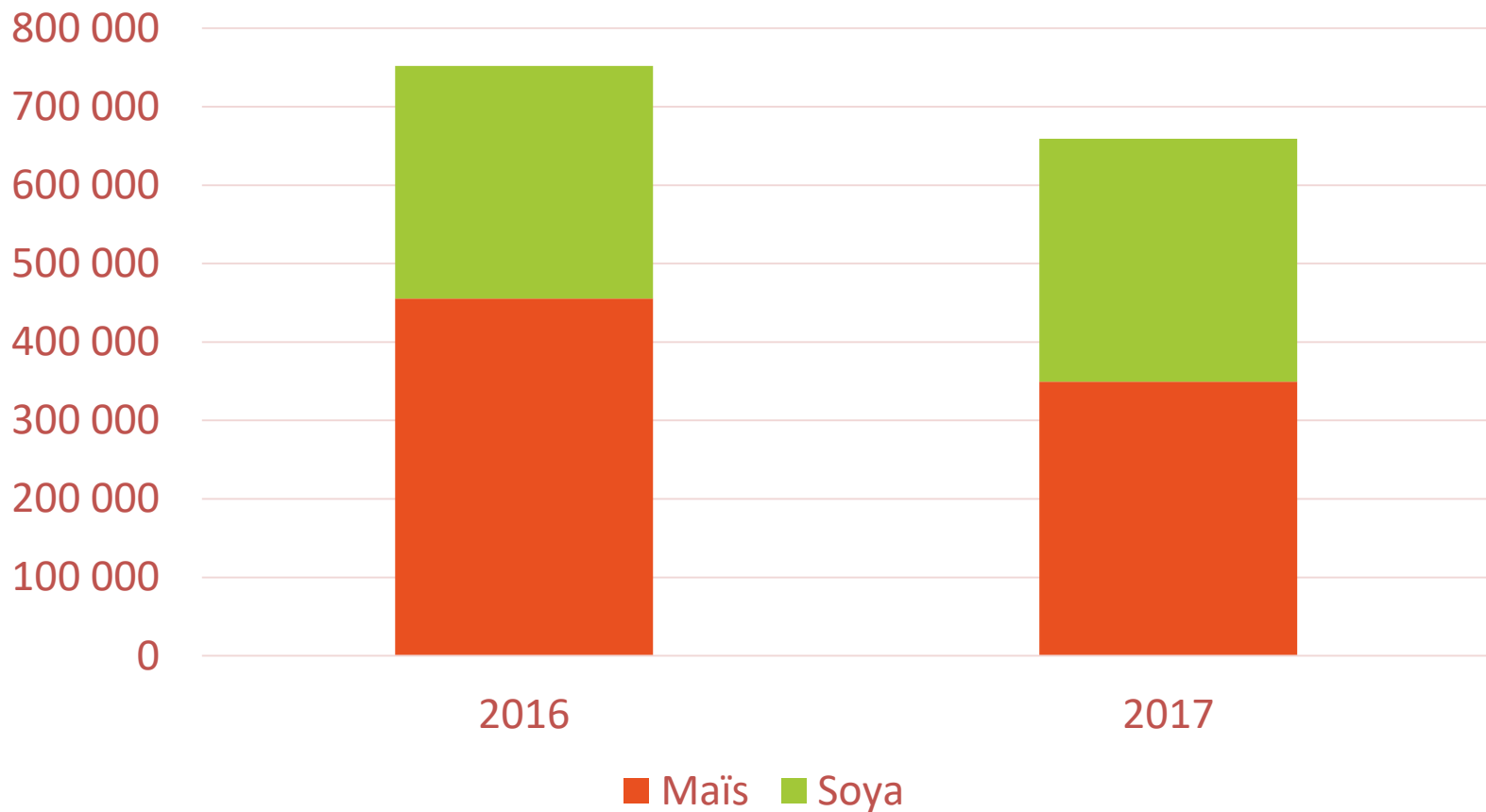
2. Production de poulets de chair bio



Source : USDA - NASS

2. Importations en 2017?

De janvier à septembre



Source : USDA - FAS

2. Importation de la Turquie

Maïs

73 %

Soya

41 %

2. Problème des importations turques

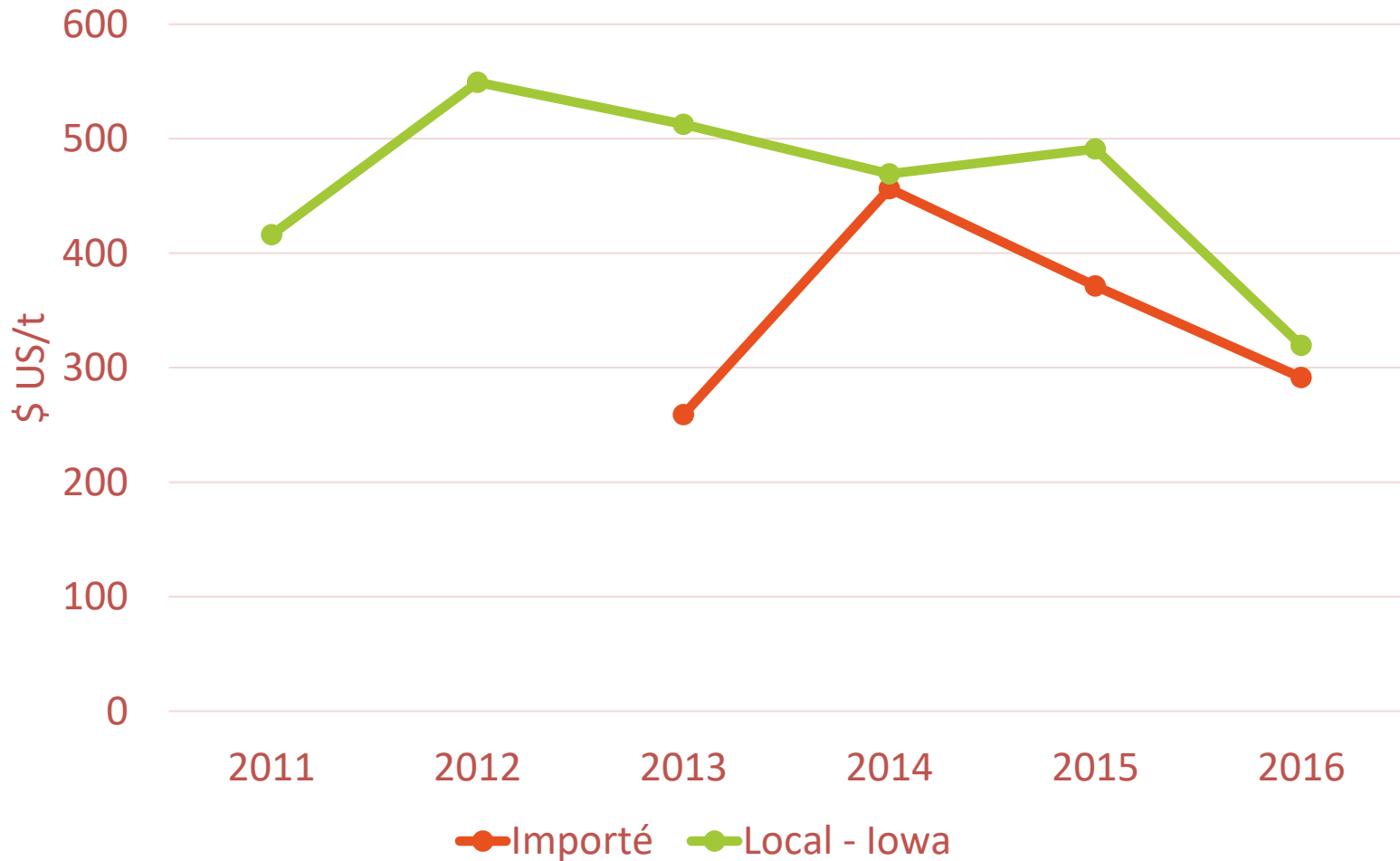
- Article du Washington Post du 12 mai 2017
- Soya conventionnel importé d'Ukraine vers la Turquie
- Ce soya s'est retrouvé en Californie « biologique »
- Les normes d'importations plus strictes au Canada qu'aux États-Unis.



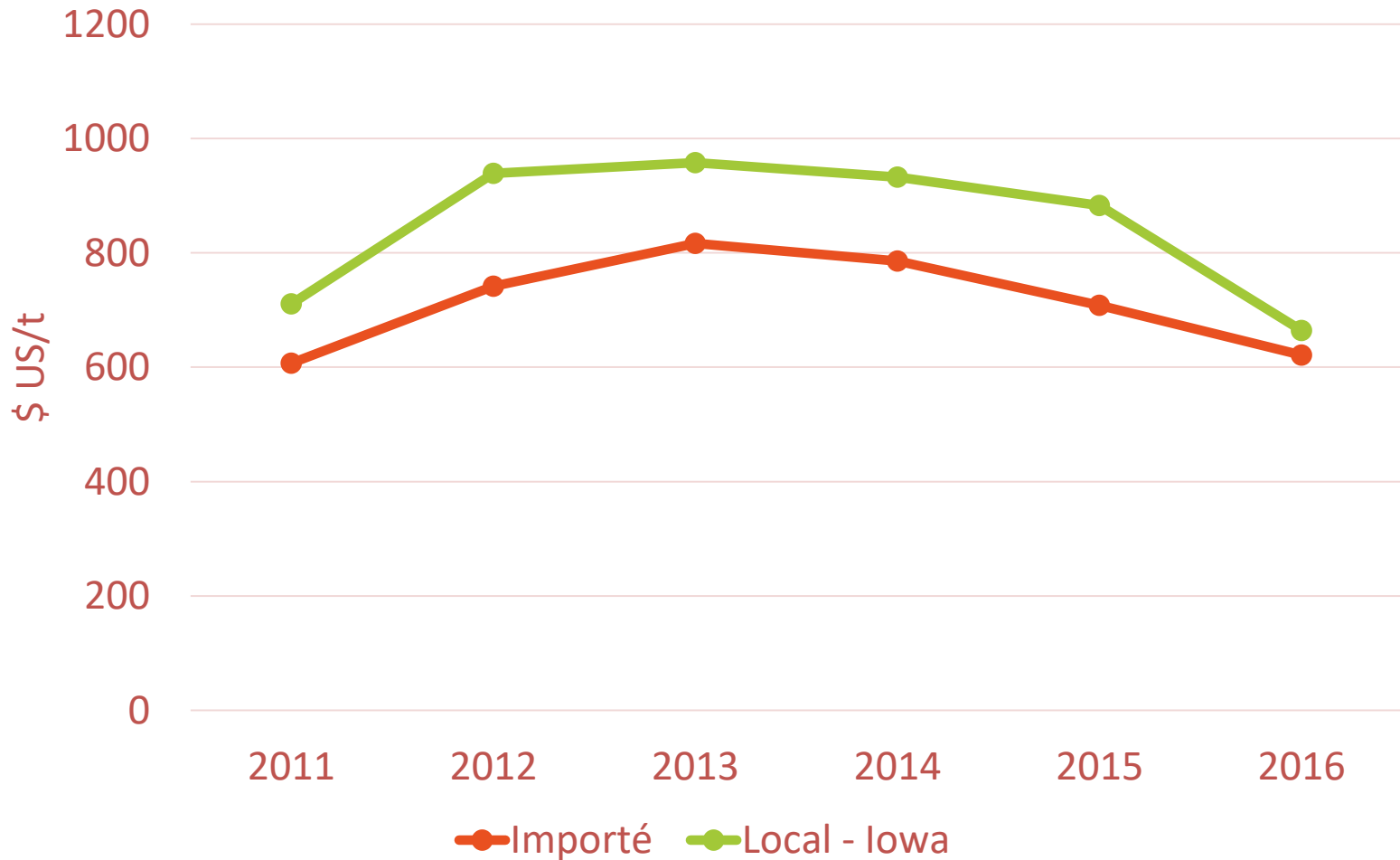
3. Comparaisons des prix



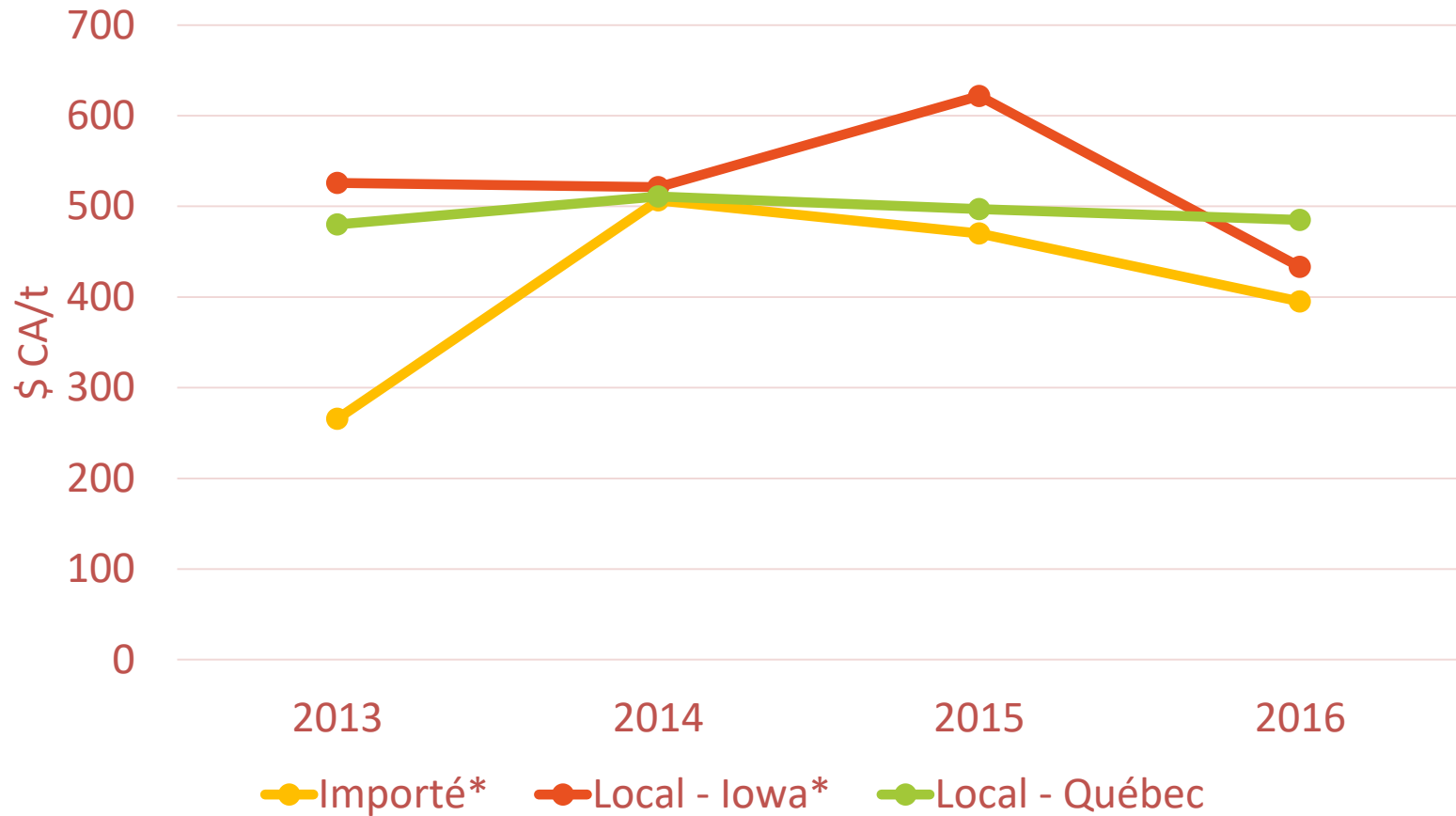
3. Comparaisons des prix - Maïs



3. Comparaisons des prix - Soya



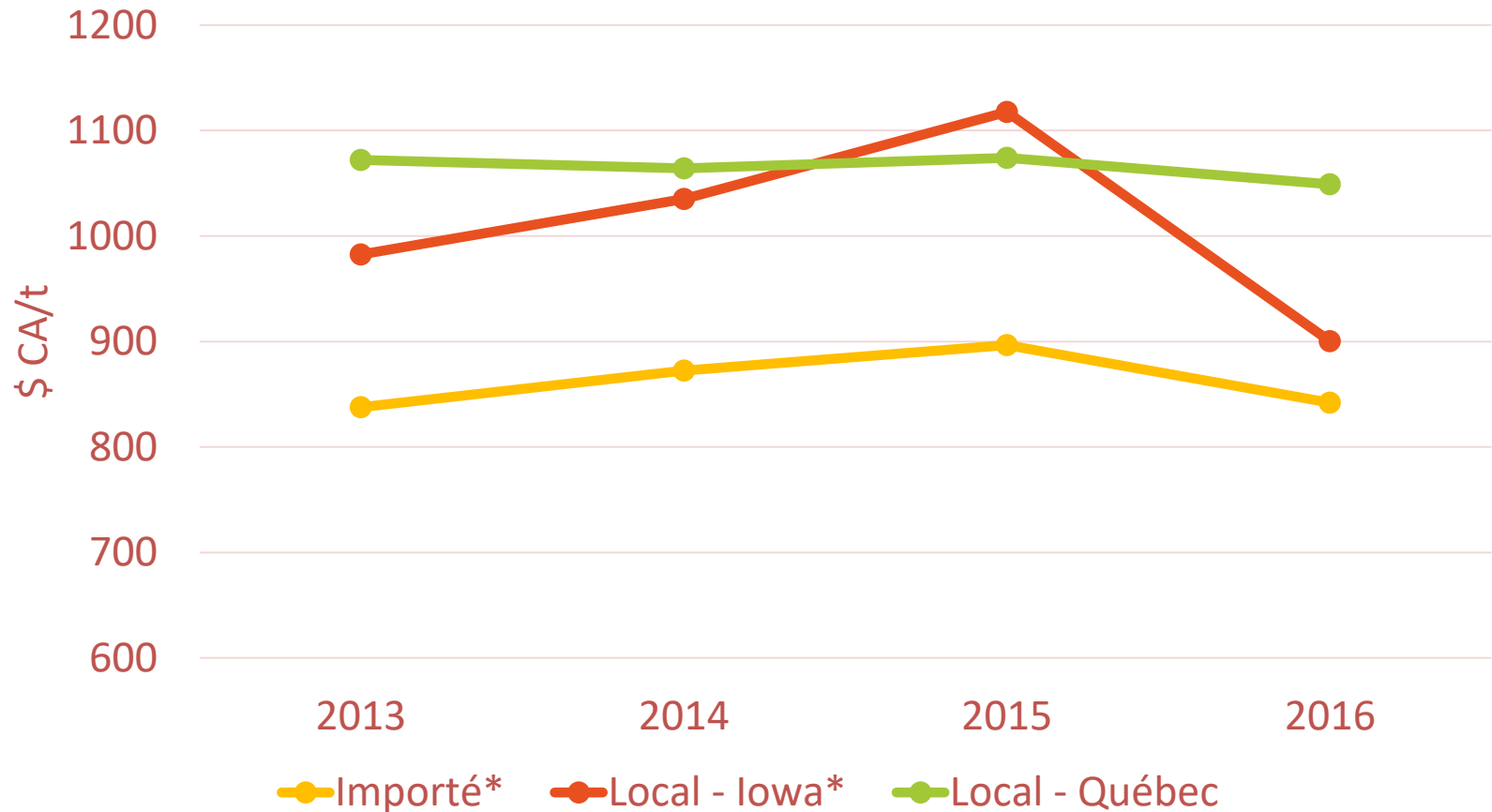
3. Comparaisons Québec et États-Unis – Maïs



Source : AdvanceEconomicSolutions, USDA – AMS et SRDI

* : Convertis avec le taux de change moyen annuel

3. Comparaisons Québec et États-Unis – Soya



Source : AdvanceEconomicSolutions, USDA – AMS et SRDI

* : Convertis avec le taux de change moyen annuel

3. Prix en 2017?

Maïs

Soya



434 \$/t*

880 \$/t*



477 \$/t

1 066 \$/t

Source : Mercaris et SRDI

* : Convertis avec un taux de change moyen de 77,13 ¢ US

4. Autres défis



4. Autres défis

- Assurez la qualité de la certification
- Se diriger chaîne de valeur (diminuer les intervenants)
- Les générations Y et Z plus préoccupées par leur alimentation
 - La génération Z est née après la mise en place du bio
- Investir dans les infrastructures
- Investir en recherche (rendements)
- Rendre l'agriculture plus attrayante pour les jeunes



5. Données bio Québec

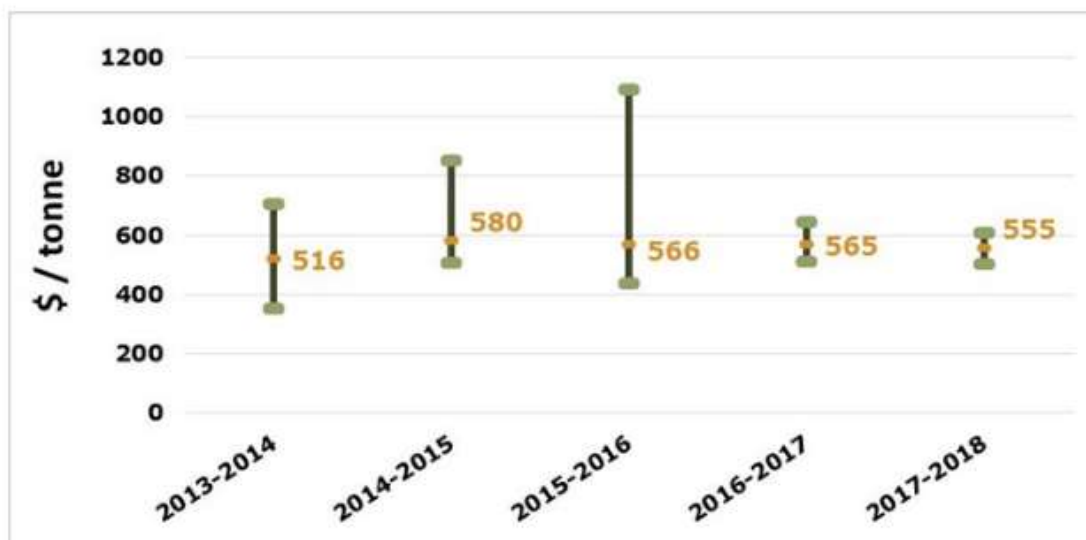
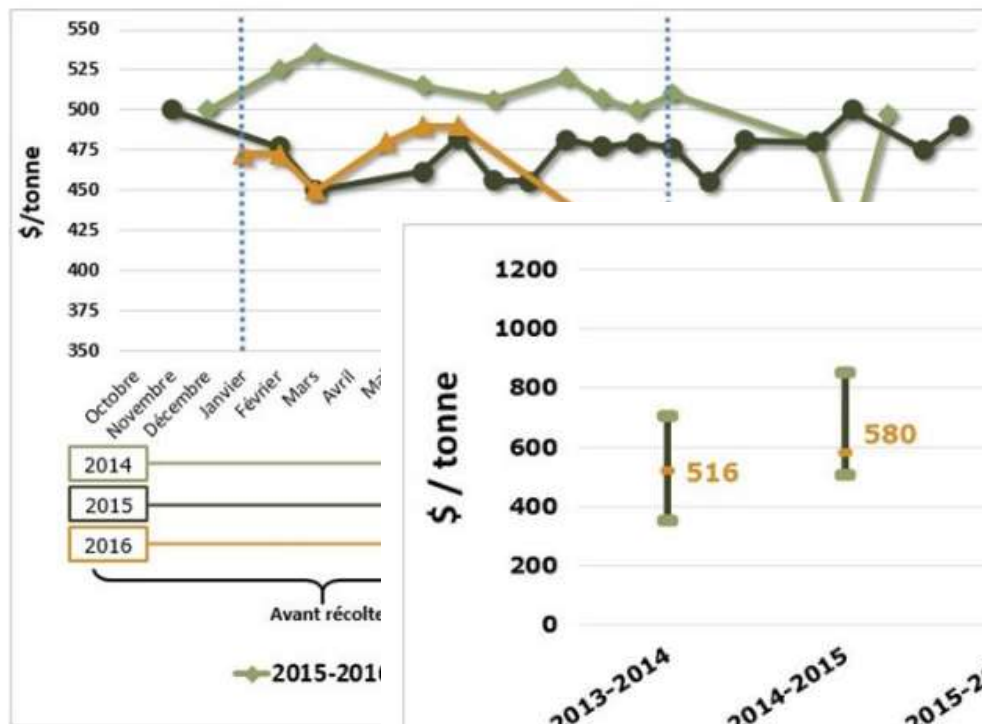
Évolution du prix des grains biologiques - Marché local

Prix moyens pondérés FAB ferme (\$/tonne)

Par année de récolte, sans égard à la date de transaction

GRAINS BIOLOGIQUES	2013 2014	2014 2015	2015 2016	2016 2017	2017 2018	Graphiques et détails
Mais-grain	480	511	497	485	477	
Soya	1 072	1 064	1 074	1 049	1 066	
Avoine	400	435	425	352	413	
Blé humain	516	580	566	565	555	
Blé fourrager	428	550	-	451	405	
Grains mélangés	476	454	505	478	511	
Orge	435	425	490	440	451	
Sarrasin	863	910	898	922	-	
Seigle	407	515	552	453	548	
Épeautre	550	636	701	741	626	
Chanvre	-	2 628	3 170	3 968	3 014	

5. Données bio Québec



Blé humain biologique	2013 2014	2014 2015	2015 2016	2016 2017	2017 2018
Prix maximum	705	850	1 091	645	608
Prix moyen pondéré	516	580	566	565	555
Prix minimum	350	505	435	510	500
Dernier prix	705	801	435	575	580



***Merci de votre attention!
Commentaire?
Question?***

Étienne Lafrance

Agent d'information sur les marchés

Producteurs de grains du Québec

Saint-Rémi, 7 décembre 2017 – MAPAQ Montérégie



Program	Year	Period	Geo Level	State	State ANSI	watershed_code	Commodity	Data Item	Domain	Domain Category	Value	CV (%)
CENSUS	2016	YEAR	STATE	MONTANA	30	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	750	42.7
CENSUS	2016	YEAR	STATE	MICHIGAN	26	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	3,040	27.5
CENSUS	2016	YEAR	STATE	MARYLAND	24	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	3,650	15.7
CENSUS	2016	YEAR	STATE	VERMONT	50	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	3,876	24.2
CENSUS	2016	YEAR	STATE	NEW YORK	36	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	11,830	19.7
CENSUS	2016	YEAR	STATE	MAINE	23	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	25,520	15.7
CENSUS	2016	YEAR	STATE	WISCONSIN	55	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	118,424	28.5
CENSUS	2016	YEAR	STATE	IOWA	19	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	1,681,677	28.5
CENSUS	2016	YEAR	STATE	VIRGINIA	51	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	2,927,000	18
CENSUS	2016	YEAR	STATE	WASHINGTON	53	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	4,623,718	57.2
CENSUS	2016	YEAR	STATE	CALIFORNIA	06	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	39,620,683	20.6
CENSUS	2016	YEAR	STATE	PENNSYLVANIA	42	00000000	CHICKENS	CHICKENS, BROILERS, ORGANIC - SALES, MEASURED IN HEAD	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	48,787,178	25.6





Program	Year	Period	Geo Level	State	State ANSI	watershed_code	Commo	Data Item	Domain	Domain Category	Value	CV (%)
CENSUS	2016	YEAR	STATE	COLORADO	08	00000000	CORN	HARVESTED	ORGANIC STATUS	(NOP USDA CERTIFIED)	1,825	17.9
CENSUS	2016	YEAR	STATE	NORTH DAKOTA	38	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	2,198	7.5
CENSUS	2016	YEAR	STATE	MARYLAND	24	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	2,238	4.7
CENSUS	2016	YEAR	STATE	OREGON	41	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	5,085	16.7
CENSUS	2016	YEAR	STATE	MISSOURI	29	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	5,373	3.1
CENSUS	2016	YEAR	STATE	SOUTH DAKOTA	46	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	5,484	7.5
CENSUS	2016	YEAR	STATE	INDIANA	18	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	6,463	3.1
CENSUS	2016	YEAR	STATE	KANSAS	20	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	7,582	7.5
CENSUS	2016	YEAR	STATE	TEXAS	48	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	8,804	14.2
CENSUS	2016	YEAR	STATE	ILLINOIS	17	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	9,072	3.1
CENSUS	2016	YEAR	STATE	OHIO	39	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	9,105	9.3
CENSUS	2016	YEAR	STATE	PENNSYLVAN	42	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	9,736	15.8
CENSUS	2016	YEAR	STATE	NEBRASKA	31	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	11,031	7.5
CENSUS	2016	YEAR	STATE	NEW YORK	36	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	14,980	7.1
CENSUS	2016	YEAR	STATE	MICHIGAN	26	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	15,012	3.1
CENSUS	2016	YEAR	STATE	WISCONSIN	55	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	27,855	4.1
CENSUS	2016	YEAR	STATE	MINNESOTA	27	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	28,524	4.9
CENSUS	2016	YEAR	STATE	IOWA	19	00000000	CORN	CORN, GRAIN, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	29,684	4.2





Program	Year	Period	Geo Level	State	State ANSI	watershed_code	Commodity	Data Item	Domain	Domain Category	Value ▲	CV (%)
CENSUS	2016	YEAR	STATE	KENTUCKY	21	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	1,039	8.5
CENSUS	2016	YEAR	STATE	MARYLAND	24	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	1,736	13.7
CENSUS	2016	YEAR	STATE	NORTH DAKOTA	38	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	1,970	9.1
CENSUS	2016	YEAR	STATE	NORTH CAROLINA	37	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	2,388	8.5
CENSUS	2016	YEAR	STATE	INDIANA	18	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	2,403	3.7
CENSUS	2016	YEAR	STATE	SOUTH DAKOTA	46	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	4,434	9.1
CENSUS	2016	YEAR	STATE	KANSAS	20	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	5,212	9.1
CENSUS	2016	YEAR	STATE	PENNSYLVAN	42	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	5,580	21.5
CENSUS	2016	YEAR	STATE	NEBRASKA	31	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	5,857	9.1
CENSUS	2016	YEAR	STATE	WISCONSIN	55	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	7,102	4.7
CENSUS	2016	YEAR	STATE	OHIO	39	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	7,488	6.3
CENSUS	2016	YEAR	STATE	MISSOURI	29	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	9,698	3.7
CENSUS	2016	YEAR	STATE	NEW YORK	36	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	9,727	7.7
CENSUS	2016	YEAR	STATE	ILLINOIS	17	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	10,787	3.7
CENSUS	2016	YEAR	STATE	MICHIGAN	26	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	10,815	3.7
CENSUS	2016	YEAR	STATE	MINNESOTA	27	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	13,893	6.6
CENSUS	2016	YEAR	STATE	IOWA	19	00000000	SOYBEANS	SOYBEANS, ORGANIC - ACRES HARVESTED	ORGANIC STATUS	ORGANIC STATUS: (NOP USDA CERTIFIED)	20,547	10.4

