



FLAX FIBRE  
**MARKET OVERVIEW**

# PRELIMINARY NOTES

**1 / All the graphs are drawn up on a sliding period of 12 months.**

It means at a given date, each data is the sum (for production and sales) or the average (for price) of the previous 12 months values.

*For example: November 2017 data are the sum/average of values from December 2016 to November 2017 included.*

**The purpose is to smooth out monthly variations and to draw short-term trends.**

**2 / Due to the agricultural context, analysis are based on agricultural campaigns, which are 12 months period between 1st July of one year to 30 June of the next year.**

**Campaign 2017/2018 starts on 01/07/2017 and ends on 30/06/2018.**

**That's why this presentation gives an overview of the 6 first months from July 2017 to December 2017 and a projection on the next 6 months from January 2018 to June 2018.**



# CAMPAIGN 2017/2018

FROM 1ST JULY 2017 TO 30TH JUNE 2018

## LONG FIBRES

From any crops & any quality

FR, B & NL SCUTCHING MILLS

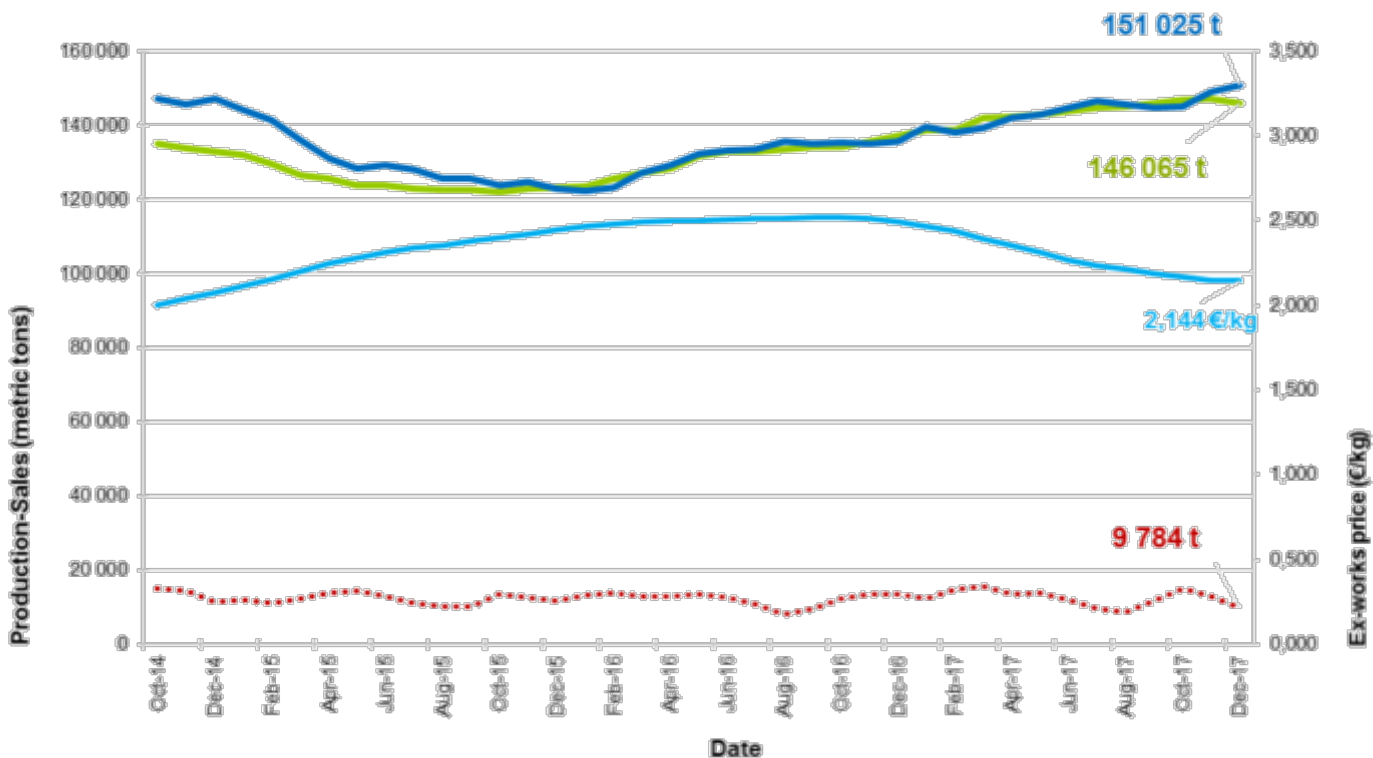
Sliding 12 months - December 2017



CAMPAIGN 2017/2018 \* FROM 1ST JULY 2017 TO 30TH JUNE 2018

# LONG FIBRES

From any crops & any quality



## 12 MONTHS VARIATION

December 2016 - December 2017

Production  
+6,4 %

Sales  
+11,4 %

Average price  
-13,9 %

Physical stock in  
scutching mills\*  
-27,3 %

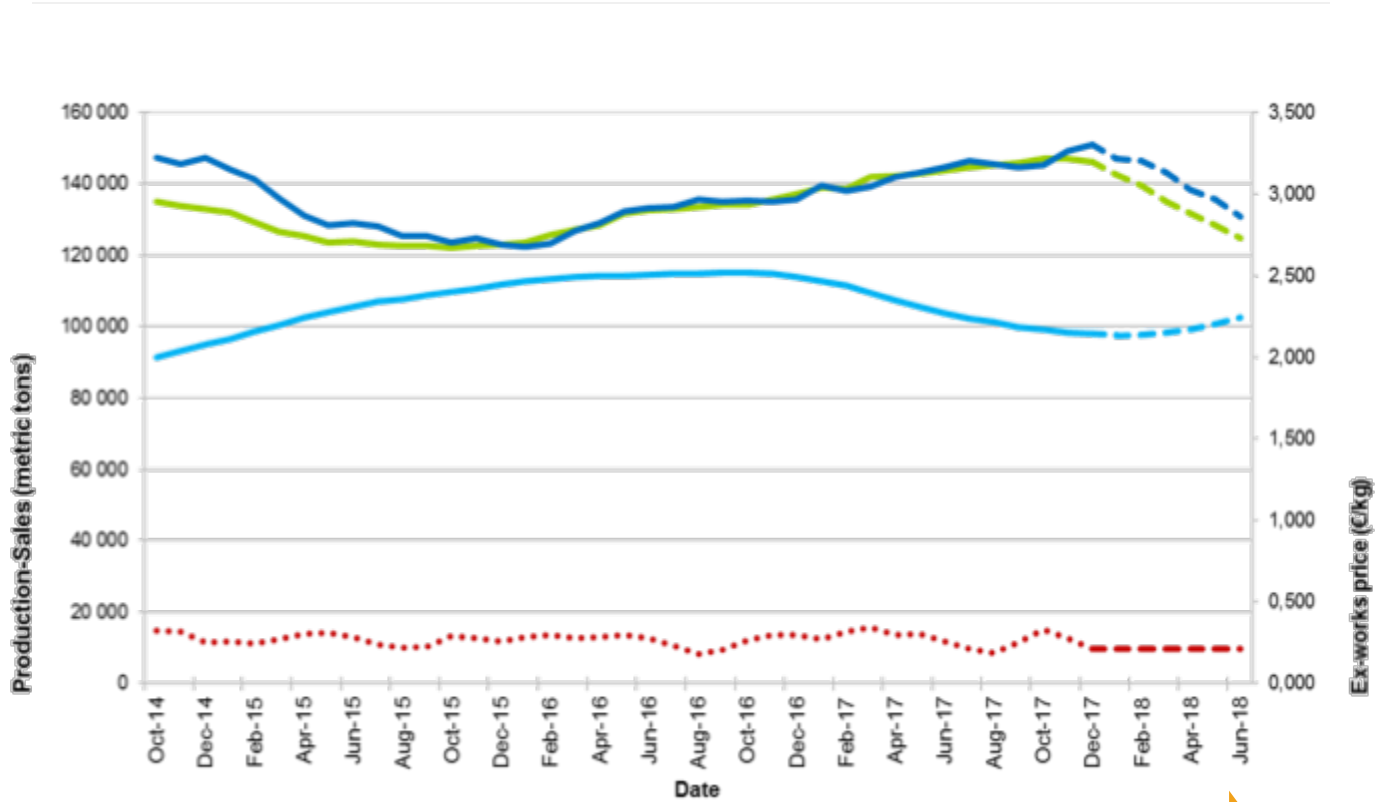
\*Physical stock is the quantity in the warehouses at the end of the month. In today market a big part of that physical stock has already a destination.



CAMPAIGN 2017/2018 \* FROM 1ST JULY 2017 TO 30TH JUNE 2018

# LONG FIBRES

From any crops & any quality



Projection  
June 2018

Production

Sales

Average price

Physical stock in  
scutching mills

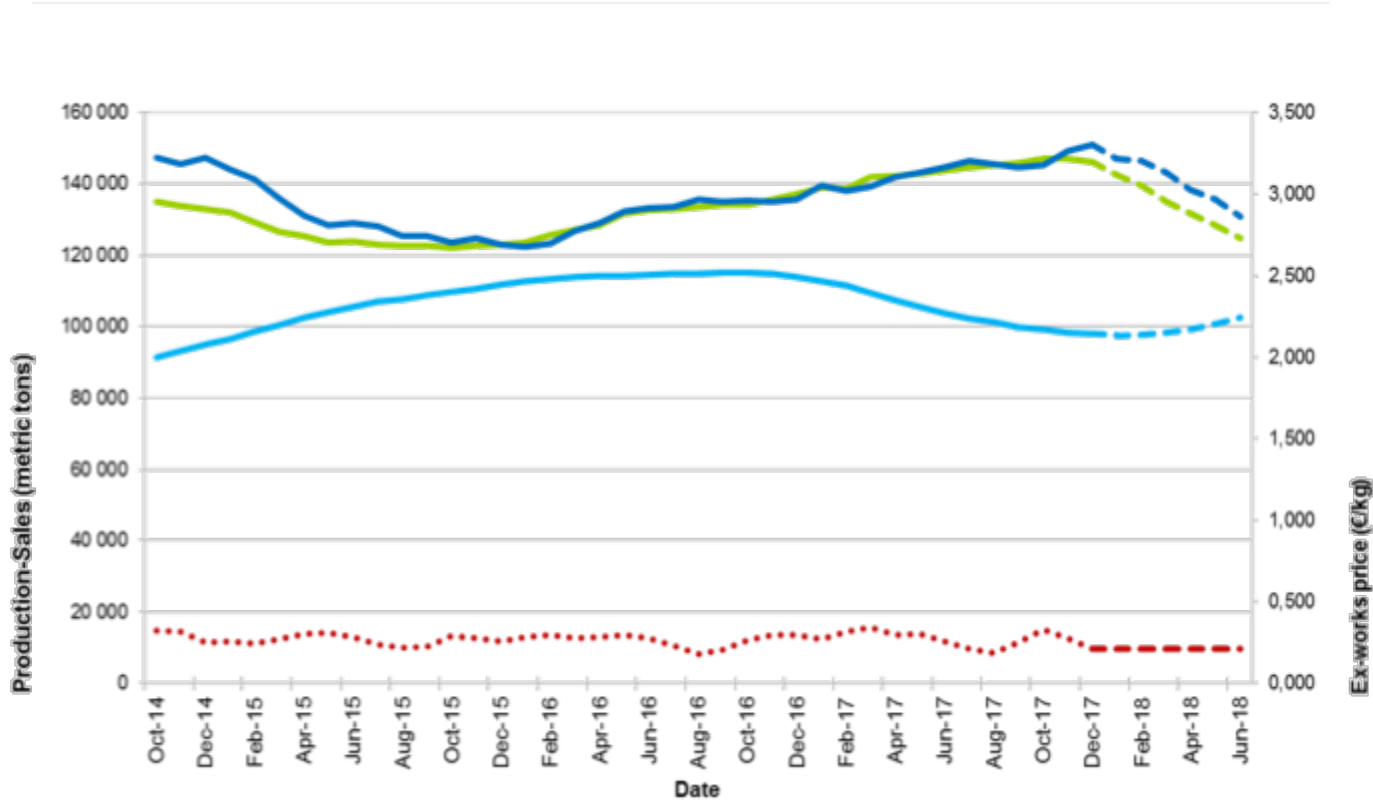




CAMPAIGN 2017/2018 \* FROM 1ST JULY 2017 TO 30TH JUNE 2018

# LONG FIBRES

From any crops & any quality



Projection  
June 2018

The forecast change in production is directly related to the characteristics of crop 2017:

a declining yield, however partly compensated by an increase in acreage and strawflax more delicate/difficult to transform: to preserve the quality of the fibers, the scutching mills, were forced, despite increasing work hours to absorb the stock of straw, to decrease the speeds of the machines temporarily.

This will lead to a productivity decline of about 20% over the next few months. The consequence of this situation and a better overall quality of the fibers of crop 2017 should lead to a significant increase in the average price.



# CAMPAIGN 2017/2018

FROM 1ST JULY 2017 TO 30TH JUNE 2018

## SHORT FIBRES

From any crops & any quality

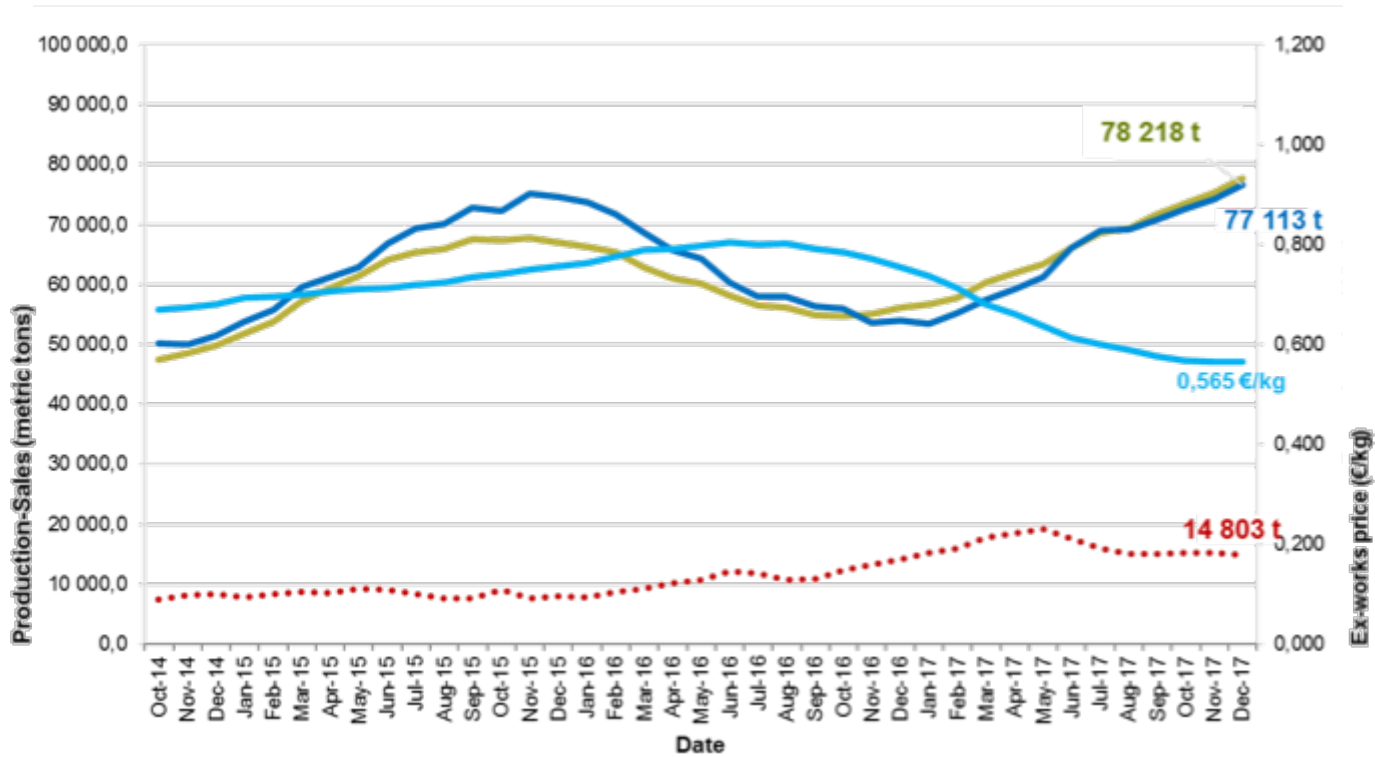
FR, B & NL SCUTCHING MILLS  
Sliding 12 months - December 2017



CAMPAIGN 2017/2018 \* FROM 1ST JULY 2017 TO 30TH JUNE 2018

# SHORT FIBRES

From any crops & any quality



## 12 MONTHS VARIATION

December 2016 - December 2017

Production  
**+39,2%**

Sales  
**+42,8%**

Average price  
**-25,3%**

Physical stock in  
scutching mills  
**+4,7%**



European Flax.  
Premium linen fiber





# CUSTOM DATA CHINA

FIBRES | IMPORTS  
YARNS | EXPORTS  
FABRICS | EXPORTS

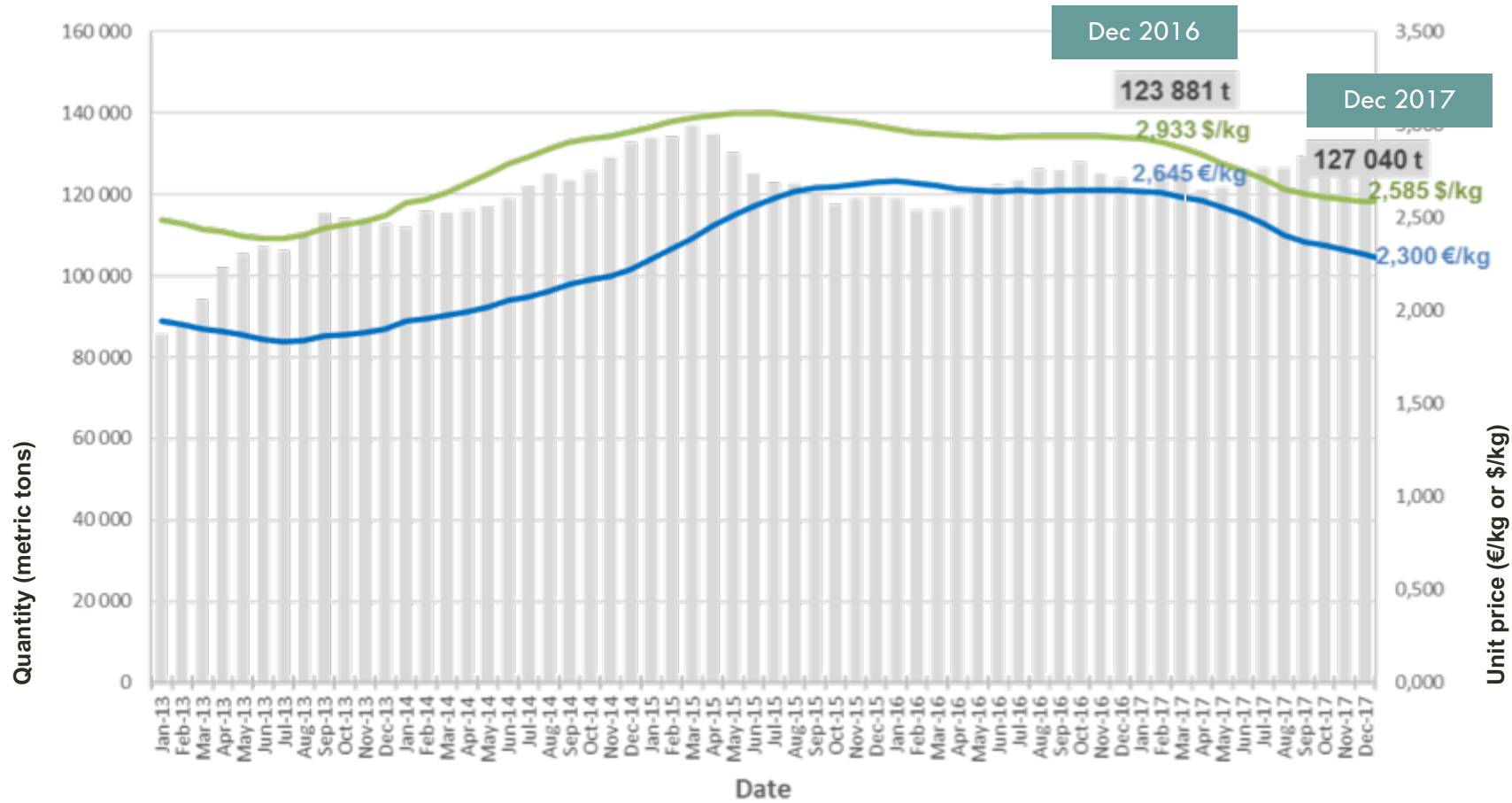
Sliding 12 months - December 2017



CUSTOM DATA

# CHINA | FIBRES | IMPORTS SLIDING 12 MONTHS

LAST 5 YEARS  
HS CODE 530121

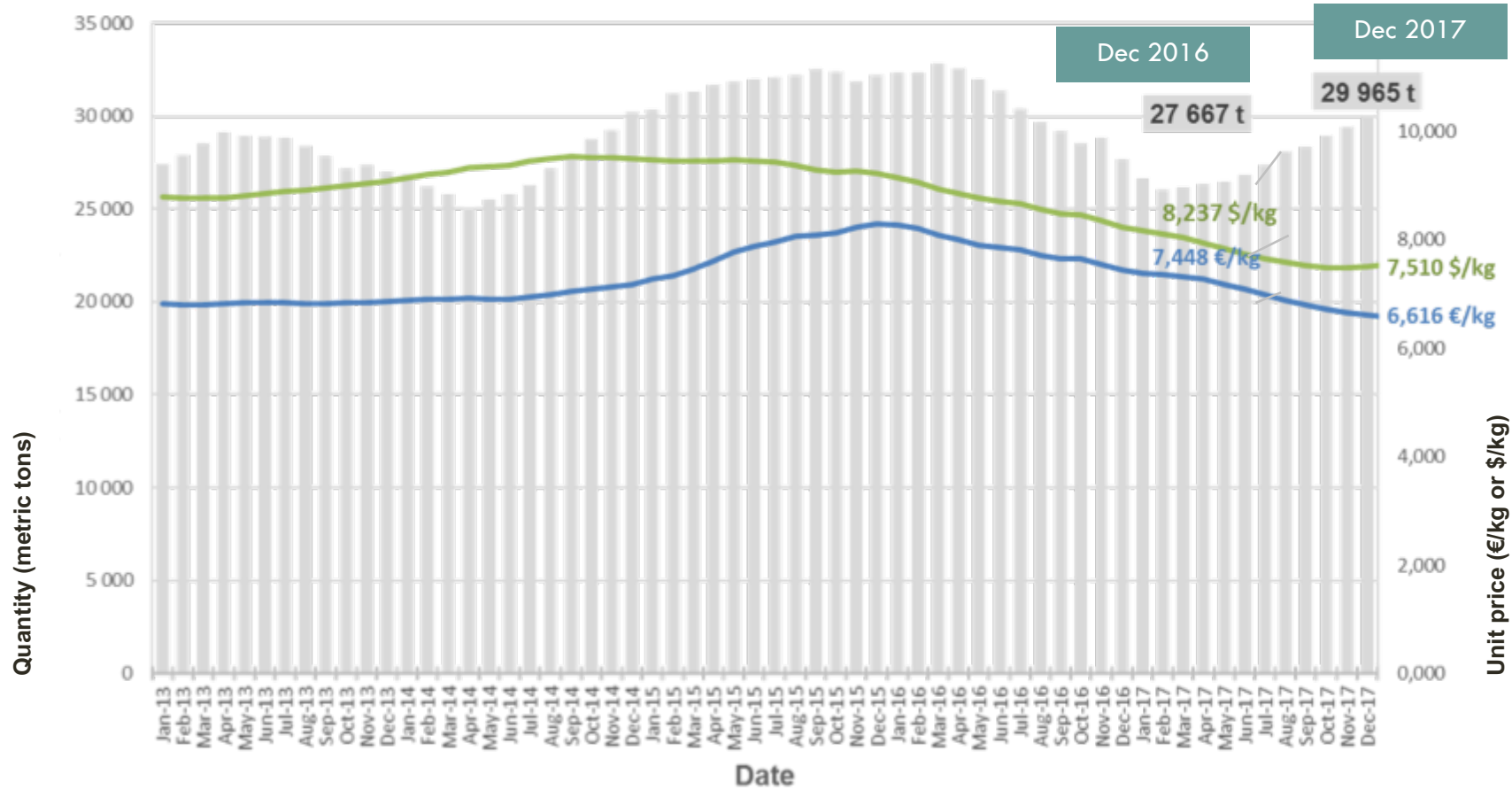


**12 MONTHS VARIATION**  
December 2016 - December 2017

Quantity (metric tons)  
**+2,6%**

Unit price delivered (\$/kg)  
**-11,9 %**

Unit price delivered (€/kg)  
**-13,1 %**



**12 MONTHS VARIATION**  
December 2016 - December 2017

- Quantity (metric tons) **+8,3%**
- Unit price delivered (\$/kg) **-8,8 %**
- Unit price delivered (€/kg) **-11,2 %**

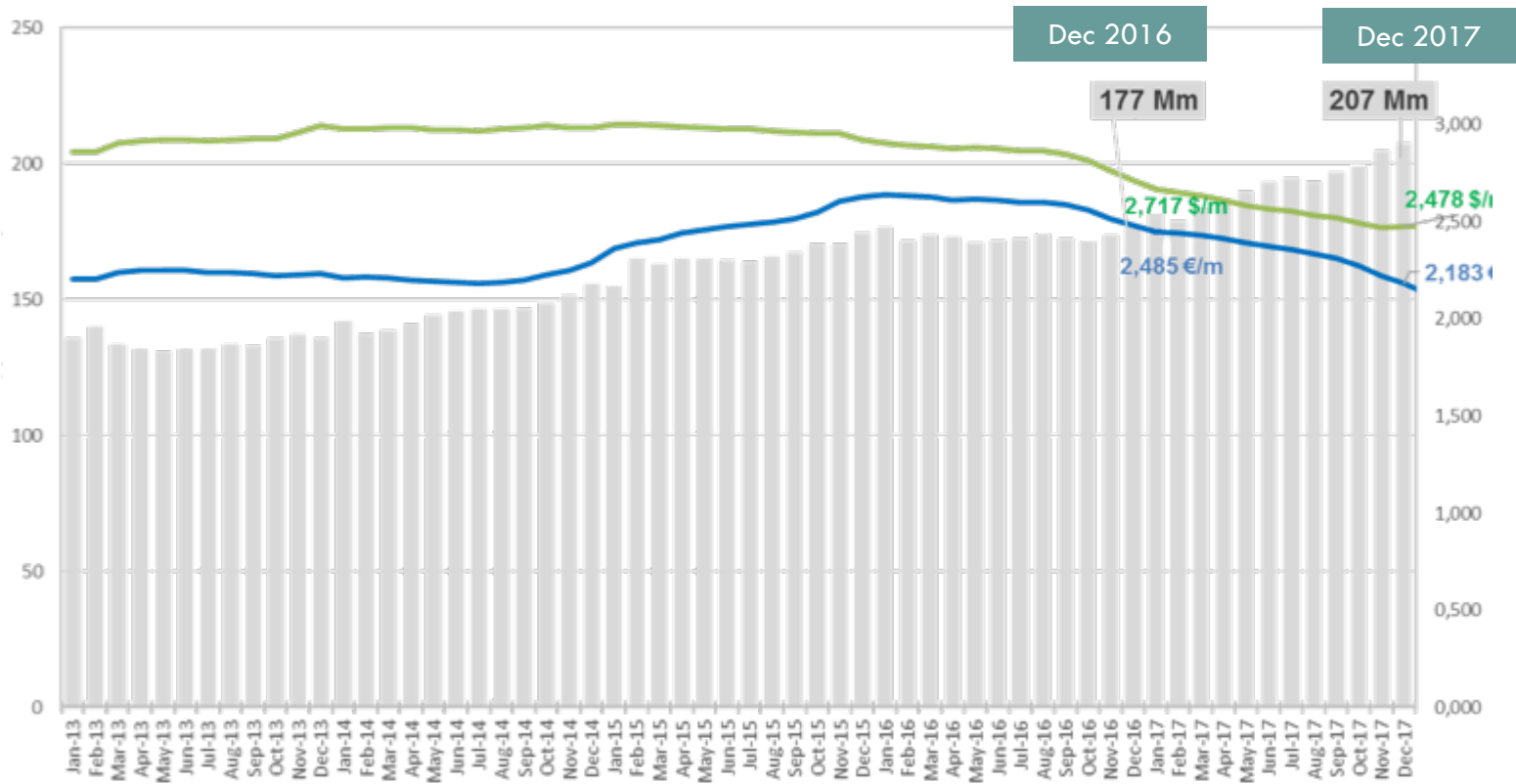


CUSTOM DATA

# CHINA | FABRICS | EXPORTS SLIDING 12 MONTHS

LAST 5 YEARS  
HS CODE 5309

Quantity (million meters)



Unit price (€/kg or \$/kg)

**12 MONTHS VARIATION**  
December 2016 - December 2017

Quantity (million meters)  
**+17,4%**

Unit price delivered (\$/m)  
**-8,8 %**

Unit price delivered (€/m)  
**-12,1 %**



European Flax.  
Premium linen fiber

# CONTACTS

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