



# **OILSEEDS and PROTEIN CROPS market situation**

**Committee for the Common Organisation  
of Agricultural Markets**

**24 August 2017**



European  
Commission

# Content

Global oilseeds production

EU oilseeds & proteins

EU oilseeds balance sheets (seeds, meals & oils)

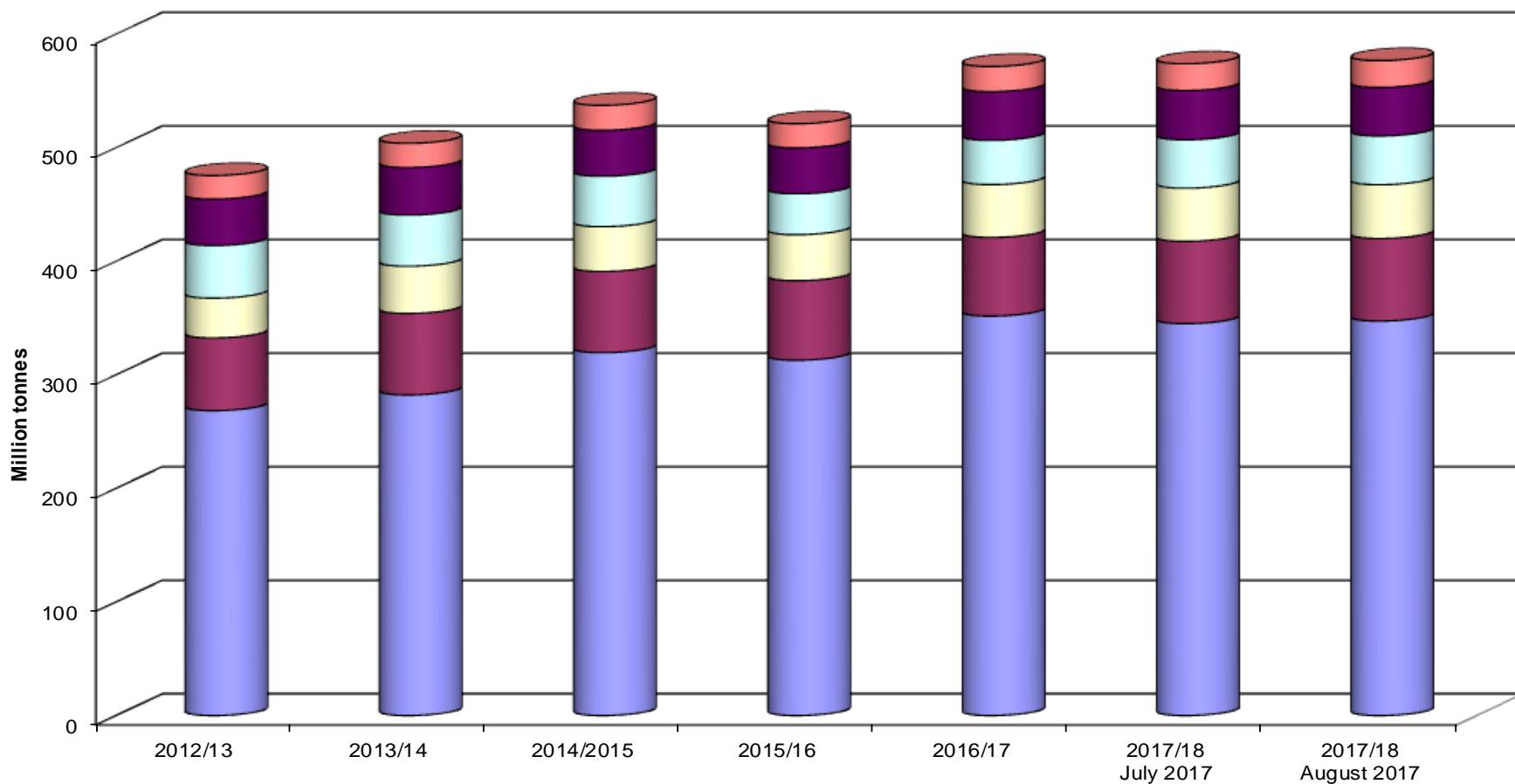


# World Oilseeds Market



European  
Commission

# Oilseeds world production



Source : USDA

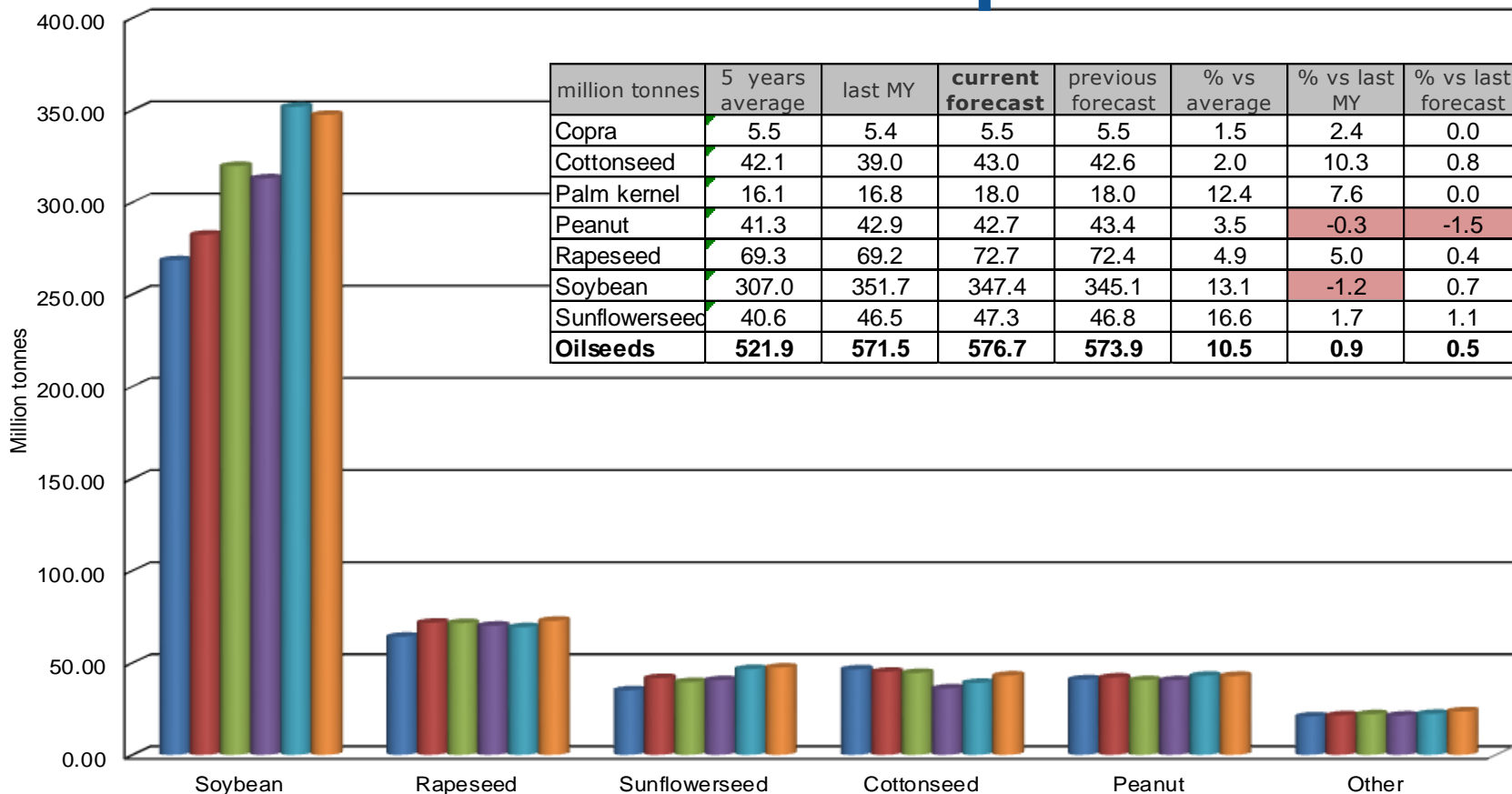
■ Soybean ■ Rapeseed ■ Sunflowerseed ■ Cottonseed ■ Peanut ■ Other

Agriculture  
and Rural  
Development



European  
Commission

# Oilseeds world production



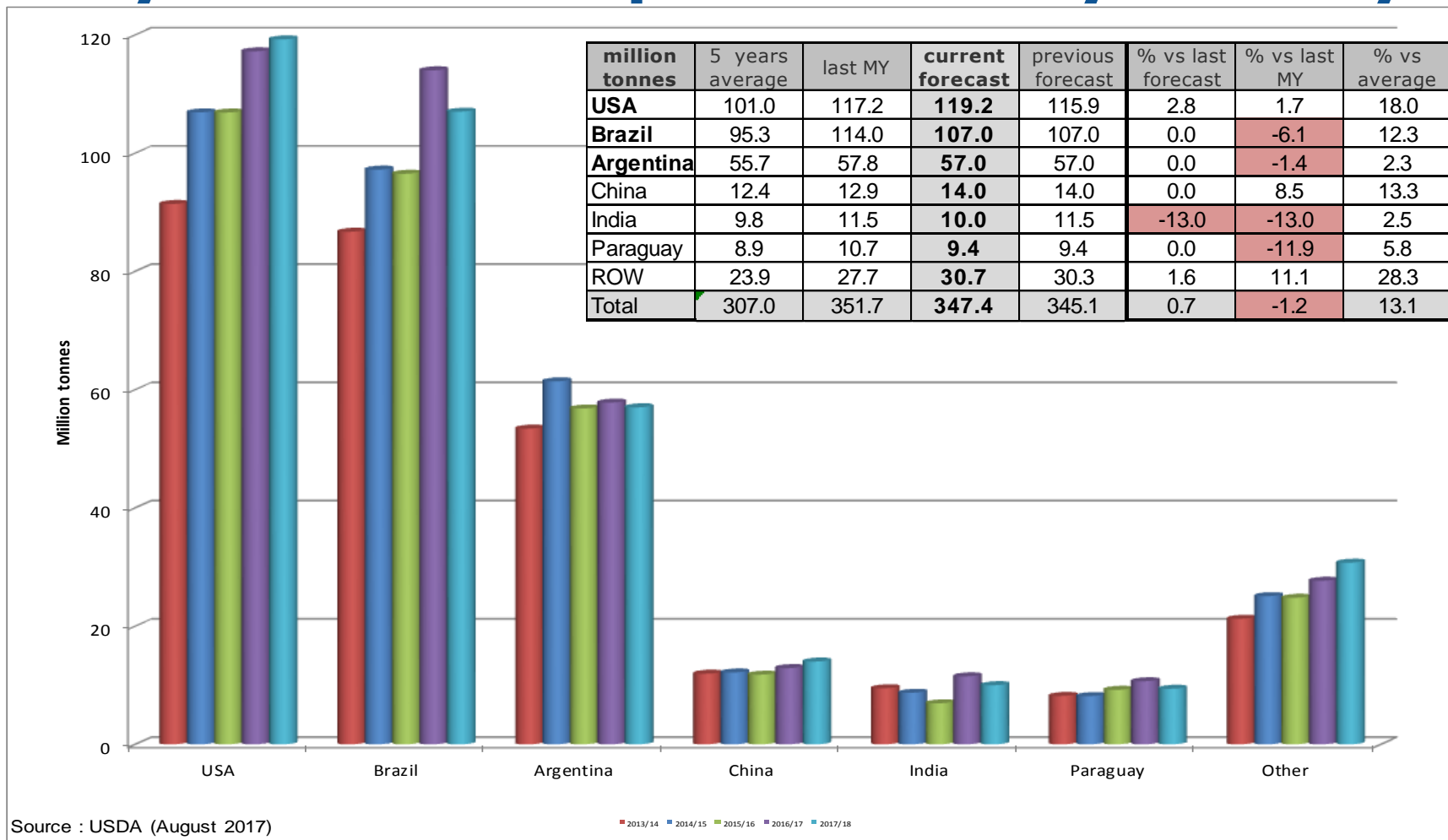
Source : USDA (August 2017)

■ 2012/13 ■ 2013/14 ■ 2014/15 ■ 2015/16 ■ 2016/17 ■ 2017/18



European Commission

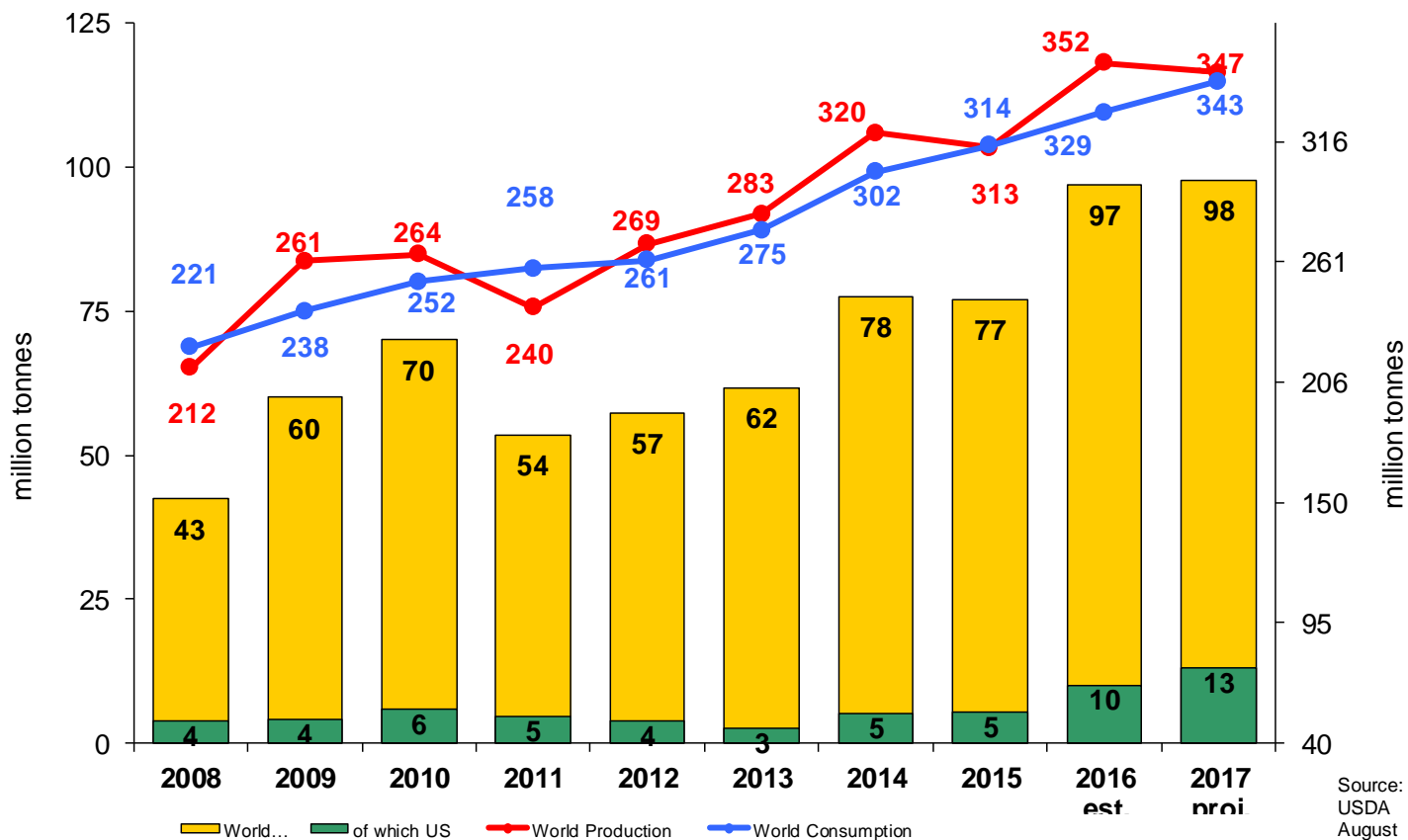
# Soybeans world production by country





European Commission

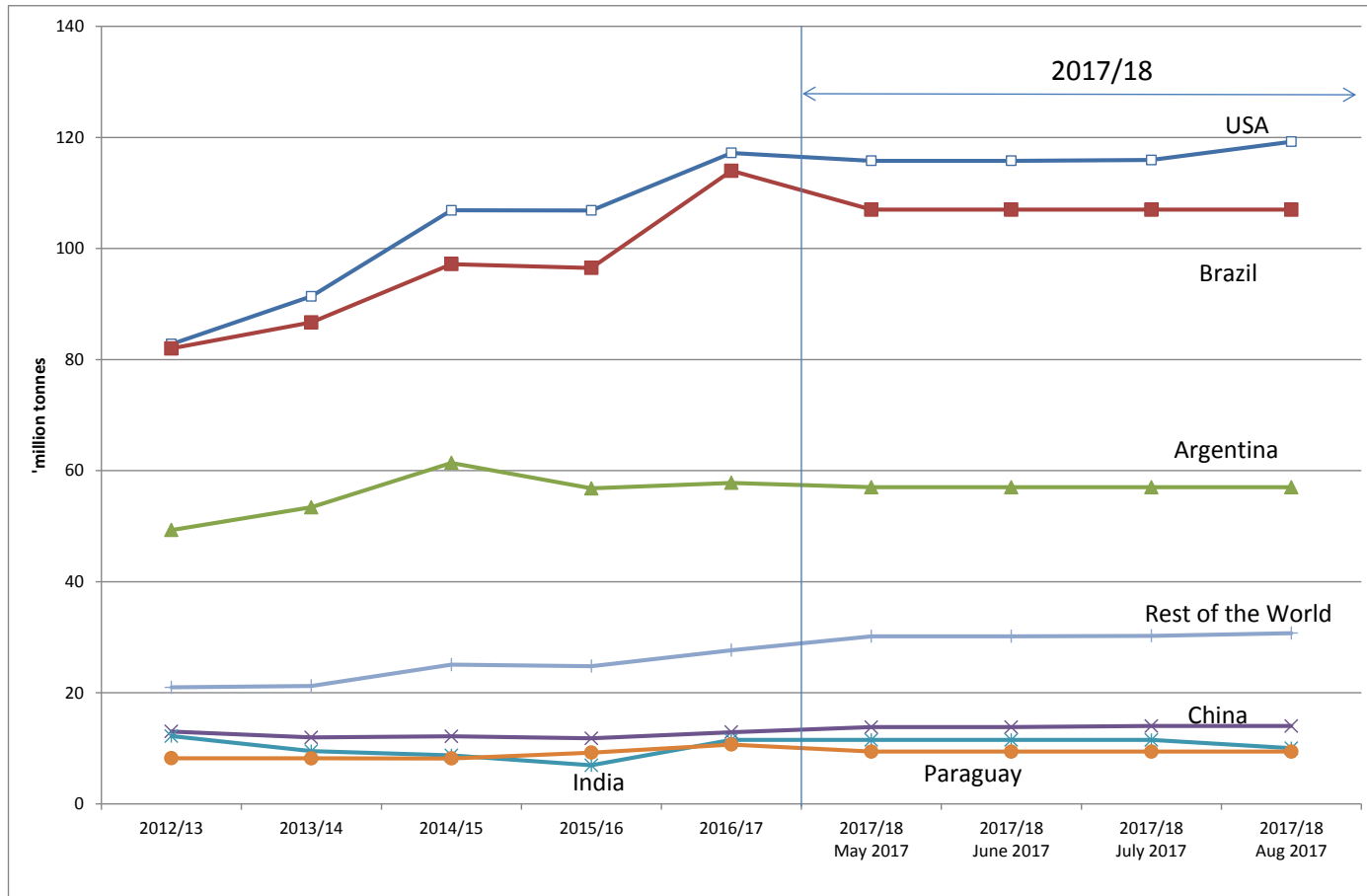
# Soybeans world production, consumption and stocks





European Commission

# Soybeans production forecast by country

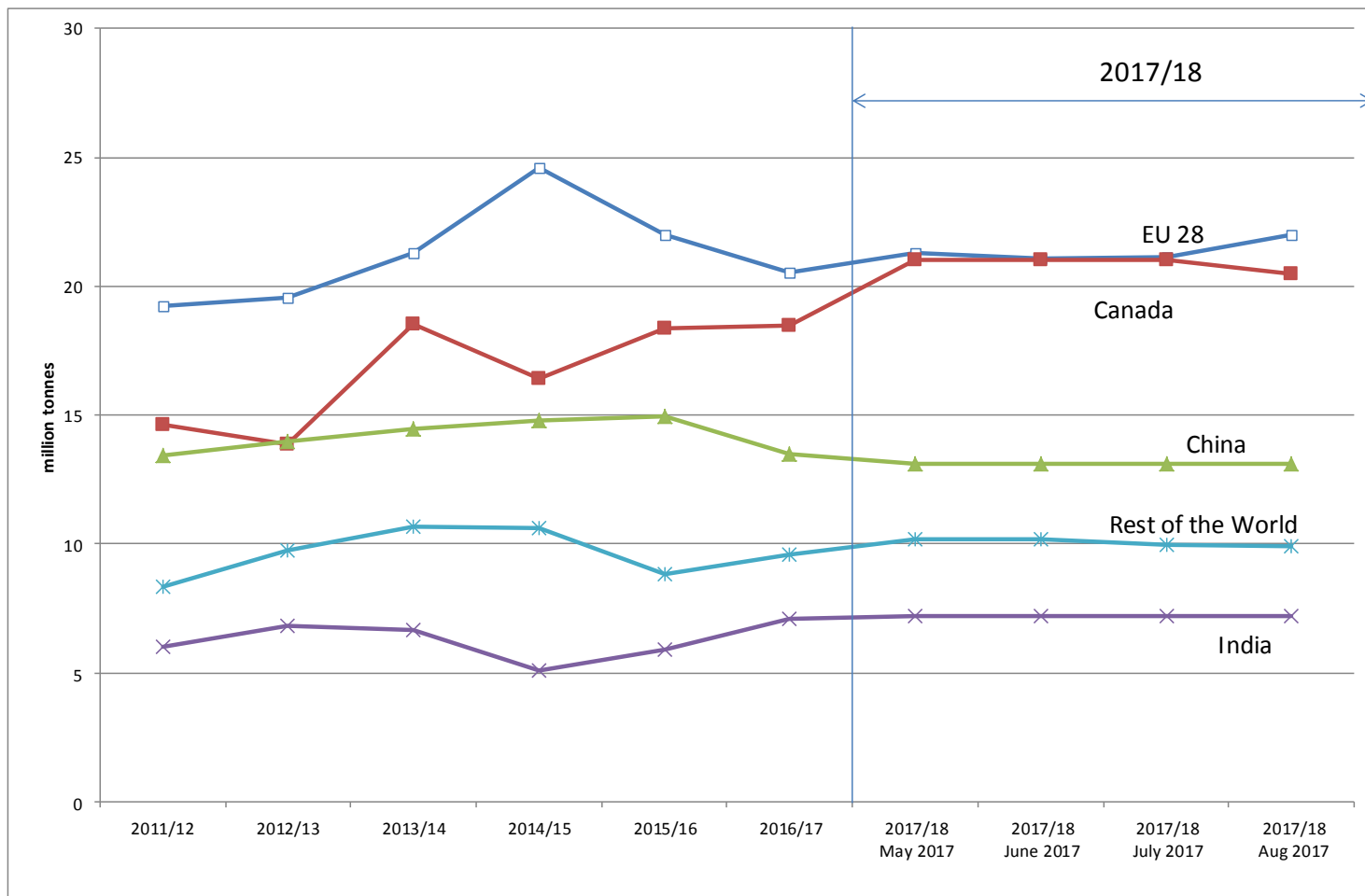






European  
Commission

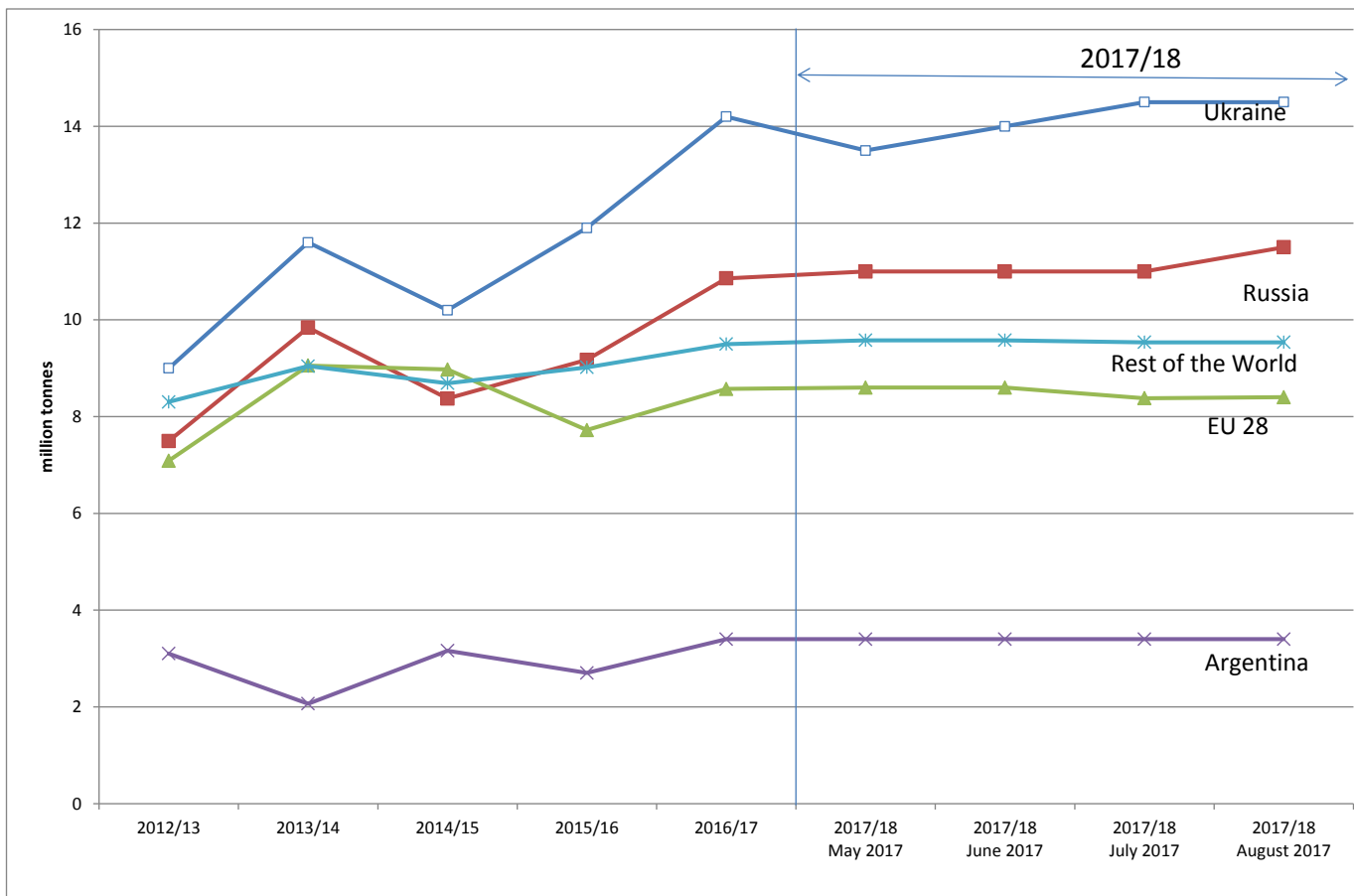
# Rapeseed production forecast by country





European  
Commission

# Sunflowerseed production forecast by country





# Global oilseeds market: key messages

## Global oilseeds production

Ample global production

Increase m/m (577m t; +10% vs 5 yr average).

## Soya, rapeseed and sunflower

Production and demand both high for the three crops.

Record production for rapeseed (73m t) and sunflower (47m t).

Second highest production for soya (347m t; -1% y/y) and record US production (119m t)



# Oilseeds and protein crops at EU level

# EU Oilseeds

## EU OILSEEDS AREA

Million ha	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
Rapeseed	6.6	6.5	6.8	6.7	2.7	2.2
Sunflower	4.3	4.2	4.2	4.2	1.4	-1.0
Soja	0.6	0.8	0.9	0.9	7.6	43.7
Linseed	0.1	0.1	0.1	0.1	-18.8	3.5
<b>TOTAL</b>	<b>11.5</b>	<b>11.6</b>	<b>11.9</b>	<b>11.9</b>	<b>2.4</b>	<b>3.3</b>

Sources : DG AGRI G.4

## EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
Rapeseed	20.8	19.7	21.7	21.9	11.2	5.0
Sunflower	8.6	8.6	9.0	8.7	1.3	1.3
Soja	1.8	2.5	2.5	2.6	4.2	43.5
Linseed	0.1	0.1	0.1	0.1	-4.1	2.5
<b>TOTAL</b>	<b>31.3</b>	<b>30.9</b>	<b>33.4</b>	<b>33.3</b>	<b>7.8</b>	<b>6.2</b>

Sources : DG AGRI G.4



European  
Commission

# EU Rapeseed

Rapeseed						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
<b>TOTAL EU</b>	20.82	19.66	21.72	21.86	11.2	5.0
France	5.05	4.30	4.69	5.23	21.5	3.4
Germany	5.21	4.58	4.85	4.70	2.7	-9.7
Poland	2.53	2.22	2.78	2.71	21.9	6.8
UK	2.38	1.78	1.98	1.90	7.3	-19.8
Czech Republic	1.35	1.36	1.29	1.25	-8.0	-7.6
Romania	0.88	1.34	1.50	1.49	11.3	68.7
Others	3.41	4.09	4.63	4.58	11.9	34.1

Sources : DG AGRI G.4



European  
Commission

# EU Sunflower

Sunflower						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
<b>TOTAL EU</b>	8.58	8.58	9.03	8.69	1.3	1.3
Romania	1.96	1.95	2.25	1.92	-1.7	-2.1
Bulgaria	1.82	1.80	2.08	1.94	8.0	6.6
Spain	0.81	0.71	0.79	0.77	7.5	-5.5
France	1.44	1.19	1.11	1.25	5.2	-13.2
Hungary	1.55	1.89	1.80	1.82	-4.1	17.4
Others	0.99	1.03	0.99	0.99	-3.9	-0.3

Sources : DG AGRI G.4



European  
Commission

# EU Soybeans

Soya						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
<b>TOTAL EU</b>	1.81	2.49	2.54	2.59	4.2	43.5
Italy	0.88	1.08	1.08	1.08	0.2	23.2
Romania	0.20	0.26	0.35	0.35	32.7	69.6
France	0.22	0.36	0.39	0.40	11.5	79.3
Croatia	0.15	0.24	0.20	0.21	-10.1	46.7
Hungary	0.11	0.18	0.17	0.17	-8.8	45.8
Austria	0.12	0.15	0.17	0.17	9.3	39.6
Others	0.12	0.21	0.18	0.22	0.6	78.7

Sources : DG AGRI G.4





European  
Commission

## EU oilseeds trade (2017/18)

Cumulated Imports (thousand tonnes) up to week 7	2017/18	Difference (%) with		Main origin of imports	share (%) in total import
		2016/17	2015/16		
soybeans	<b>1 655.2</b>	▼ -15%	▼ -16%	Brazil	55.4%
rapeseed	<b>173.0</b>	▲ 153%	▼ -31%	Australia	37.5%
sunflowerseed	<b>32.6</b>	▼ -67%	▲ 100%	Moldova, Republic of	48.2%
soymeal	<b>2 422.1</b>	▲ 6%	▼ -22%	Argentina	49.5%
rapemeal	<b>10.9</b>	▼ -48%	▼ -74%	Serbia	53.8%
sunmeal	<b>443.3</b>	▲ 24%	▲ 36%	Ukraine	66.9%
soyoil	<b>27.0</b>	▼ -20%	▼ -26%	Norway	38.6%
rapeoil	<b>14.1</b>	▲ 10%	▲ 6%	Russian Federation	36.5%
sunoil	<b>268.0</b>	▼ -29%	▲ 88%	Ukraine	95.7%
palm oil	<b>717.9</b>	▼ -3%	▼ -27%	Indonesia	56.5%



# Key messages - oilseeds

EU oilseeds production at 33.4m t (second highest production; record in 2014/15 at 35m t).

rapeseed revised up (m/m) at 21.9m t

higher (m/m) forecast for FR but lower for DE, PL, UK, CZ and RO

sunflower revised down (m/m) at 8.7m t

record EU production of soya at 2.6m t

# EU Protein crops

## EU PROTEIN CROPS AREA

Million ha	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
Field peas	0.6	0.9	0.9	1.0	4.6	59.0
Broad beans	0.5	0.6	0.6	0.6	-0.3	41.5
Sweet lupins	0.1	0.2	0.3	0.2	1.3	38.5
<b>TOTAL</b>	<b>1.2</b>	<b>1.7</b>	<b>1.8</b>	<b>1.8</b>	<b>2.5</b>	<b>50.0</b>

Sources : DG AGRI G.4

## EU PROTEIN CROPS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
Field peas	1.6	2.3	2.5	2.7	16.6	70.4
Broad beans	1.4	1.9	2.0	2.0	7.2	47.3
Sweet lupins	0.2	0.3	0.4	0.3	0.9	35.0
<b>TOTAL</b>	<b>3.2</b>	<b>4.5</b>	<b>4.9</b>	<b>5.0</b>	<b>11.6</b>	<b>57.9</b>

Sources : DG AGRI G.4

# Field peas

Field peas						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
<b>TOTAL EU</b>	1.58	2.31	2.50	2.70	16.6	70.5
Spain	0.18	0.30	0.23	0.22	-24.8	24.9
France	0.54	0.52	0.66	0.78	49.4	46.2
Germany	0.19	0.29	0.33	0.33	15.1	75.6
UK	0.14	0.19	0.22	0.19	-0.5	36.7
Romania	0.05	0.08	0.16	0.16	102.8	196.9
Hungary	0.05	0.05	0.04	0.04	-19.6	-18.5
Others	0.44	0.89	0.86	0.97	9.4	121.1

Sources : DG AGRI G.4

# Broad beans

Broad beans						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 July 2017	2017/18 August 2017	%change 2016/17	%change 5yrs trimmed
<b>TOTAL EU</b>	1.38	1.90	1.99	2.04	7.2	47.3
UK	0.50	0.65	0.71	0.69	5.6	38.4
France	0.26	0.20	0.19	0.22	11.6	-14.2
Italy	0.09	0.10	0.10	0.10	-0.5	6.0
Spain	0.04	0.06	0.07	0.06	10.3	49.5
Romania	0.02	0.02	0.01	0.01	-32.4	-33.7
Germany	0.09	0.15	0.18	0.18	14.6	87.4
Others	0.38	0.73	0.74	0.78	7.6	104.3

Sources : DG AGRI G.4



# Key messages – protein crops

EU protein crops:

area increased by 50% (vs 5 years average) at 1.8m ha

production at 5.0m t (+58% vs 5 year's average)



# EU 28 S&D balance sheets seeds/beans, oils and meals



European  
Commission

# OILSEEDS balance sheet

Oilseeds (mio. t)	2012/13	2013/14	2014/15	2015/16p	2016/17e	2017/18f	5-yr. av. 2012-17
<b>Production</b>	<b>27.4</b>	<b>31.5</b>	<b>35.4</b>	<b>32.1</b>	<b>30.7</b>	<b>33.1</b>	<b>31.4</b>
Rape	19.3	21.0	24.3	21.8	19.7	21.9	20.8
Soybean	1.0	1.2	1.8	2.4	2.5	2.6	1.8
Sunflower	7.2	9.3	9.3	7.9	8.6	8.7	8.6
<b>Total domestic use</b>	<b>44.1</b>	<b>47.7</b>	<b>49.3</b>	<b>49.9</b>	<b>49.4</b>	<b>49.5</b>	<b>48.8</b>
Rape	23.2	24.2	25.9	24.9	24.1	25.0	24.4
of which crushing	22.3	23.5	25.0	24.1	23.4	24.2	23.7
Soybean	13.7	14.7	14.4	17.0	16.4	16.0	15.2
of which crushing	12.3	13.2	12.9	15.1	14.7	14.2	13.6
Sunflower	7.2	8.8	8.9	8.1	8.9	8.6	8.6
of which crushing	6.3	7.8	7.9	7.0	7.8	7.6	7.6
<b>Imports</b>	<b>16.0</b>	<b>17.4</b>	<b>15.8</b>	<b>18.6</b>	<b>19.5</b>	<b>17.4</b>	<b>17.4</b>
Rape	3.4	3.5	2.3	3.5	4.7	3.5	3.5
Soybean	12.4	13.6	13.2	14.7	14.0	13.6	13.6
Sunflower	0.2	0.3	0.3	0.5	0.8	0.4	0.4
<b>Exports</b>	<b>0.6</b>	<b>1.1</b>	<b>1.3</b>	<b>0.9</b>	<b>0.9</b>	<b>0.9</b>	<b>1.0</b>
Rape	0.1	0.3	0.6	0.3	0.3	0.3	0.3
Soybean	0.1	0.1	0.1	0.1	0.2	0.1	0.1
Sunflower	0.4	0.7	0.6	0.4	0.4	0.5	0.5
<b>End stocks</b>	<b>2.4</b>	<b>2.6</b>	<b>3.2</b>	<b>3.1</b>	<b>2.9</b>	<b>3.0</b>	<b>2.8</b>
Rape	0.9	1.0	1.1	1.1	1.0	1.1	1.0
Soybean	0.9	0.9	1.4	1.4	1.2	1.3	1.2
Sunflower	0.7	0.7	0.7	0.6	0.7	0.7	0.7
Self sufficiency rate %	62	66	72	64	62	67	





European  
Commission

# OILSEEDS MEALS balance sheet

Meals (mio. t)	2012/13	2013/14	2014/15	2015/16p	2016/17e	2017/18f	5-gr. av. 2012-17
<b>Production</b>	<b>25.9</b>	<b>28.1</b>	<b>28.8</b>	<b>29.5</b>	<b>29.2</b>	<b>29.2</b>	<b>28.7</b>
Rape	12.7	13.4	14.3	13.8	13.3	13.8	13.5
Soybean	9.7	10.4	10.2	11.9	11.6	11.2	10.7
Sunflower	3.4	4.3	4.4	3.9	4.3	4.2	4.2
<b>Total domestic use</b>	<b>45.9</b>	<b>49.4</b>	<b>50.0</b>	<b>52.3</b>	<b>50.4</b>	<b>50.5</b>	<b>49.9</b>
Rape	12.8	13.5	14.3	13.7	13.0	13.8	13.4
Soybean	26.0	28.7	28.4	31.8	29.6	29.4	28.9
Sunflower	7.1	7.2	7.3	6.9	7.7	7.3	7.2
<b>Imports</b>	<b>21.1</b>	<b>22.0</b>	<b>22.3</b>	<b>23.8</b>	<b>22.2</b>	<b>22.3</b>	<b>22.2</b>
Rape	0.4	0.5	0.5	0.4	0.2	0.4	0.4
Soybean	17.0	18.5	18.6	20.2	18.3	18.5	18.5
Sunflower	3.7	3.1	3.2	3.2	3.6	3.4	3.4
<b>Exports</b>	<b>1.1</b>	<b>0.9</b>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>
Rape	0.3	0.4	0.4	0.5	0.5	0.4	0.4
Soybean	0.7	0.3	0.3	0.3	0.3	0.3	0.3
Sunflower	0.1	0.2	0.3	0.2	0.3	0.2	0.2
<b>End stocks</b>	<b>0.6</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>
Rape	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Soybean	0.5	0.3	0.4	0.4	0.3	0.3	0.3
Sunflower	0.1	0.1	0.1	0.1	0.1	0.1	0.1
<b>Self sufficiency rate %</b>	<b>56</b>	<b>57</b>	<b>58</b>	<b>56</b>	<b>58</b>	<b>58</b>	



European  
Commission

# VEGETABLE OILS balance sheet

Vegetable oils (mio. t)	2012/13	2013/14	2014/15	2015/16p	2016/17e	2017/18f	5-gr.av. 2012-17
<b>Production</b>	<b>14.2</b>	<b>15.5</b>	<b>16.2</b>	<b>15.9</b>	<b>15.8</b>	<b>15.9</b>	<b>15.7</b>
Rape	9.1	9.6	10.3	9.9	9.6	9.9	9.7
Soybean	2.5	2.6	2.6	3.0	2.9	2.8	2.7
Sunflower	2.6	3.3	3.3	3.0	3.3	3.2	3.2
Palm	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total domestic use</b>	<b>20.0</b>	<b>22.0</b>	<b>22.8</b>	<b>23.1</b>	<b>22.5</b>	<b>22.6</b>	<b>22.4</b>
Rape	8.9	9.4	10.2	9.8	9.4	9.8	9.5
Soybean	1.7	2.1	1.9	2.4	2.3	2.2	2.1
Sunflower	3.5	3.7	3.9	3.9	4.3	3.9	3.9
Palm	6.0	6.7	6.7	7.0	6.5	6.7	6.6
<b>Imports</b>	<b>7.6</b>	<b>8.4</b>	<b>8.5</b>	<b>9.0</b>	<b>8.6</b>	<b>8.5</b>	<b>8.5</b>
Rape	0.2	0.3	0.3	0.2	0.2	0.2	0.2
Soybean	0.3	0.4	0.3	0.3	0.3	0.3	0.3
Sunflower	1.1	0.9	1.0	1.3	1.5	1.1	1.1
Palm	6.1	6.9	6.9	7.1	6.6	6.8	6.8
<b>Exports</b>	<b>1.8</b>	<b>1.6</b>	<b>1.9</b>	<b>1.8</b>	<b>1.8</b>	<b>1.8</b>	<b>1.8</b>
Rape	0.5	0.3	0.4	0.4	0.3	0.3	0.3
Soybean	1.0	0.8	0.9	1.0	0.9	0.9	0.9
Sunflower	0.2	0.3	0.4	0.4	0.4	0.4	0.4
Palm	0.1	0.1	0.2	0.1	0.2	0.1	0.1
<b>End stocks</b>	<b>1.2</b>	<b>1.6</b>	<b>1.6</b>	<b>1.5</b>	<b>1.5</b>	<b>1.5</b>	<b>1.5</b>
Rape	0.4	0.6	0.6	0.6	0.6	0.6	0.6
Soybean	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Sunflower	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Palm	0.4	0.4	0.5	0.5	0.5	0.5	0.5
Self sufficiency rate %	<b>71</b>	<b>71</b>	<b>71</b>	<b>69</b>	<b>70</b>	<b>70</b>	



**Thank you for your attention!**

**Presentations & Balance sheets  
available at:**

**[http://ec.europa.eu/agriculture/cereals/index\\_en.htm](http://ec.europa.eu/agriculture/cereals/index_en.htm)**