



Oilseeds and Protein Crops market situation

Meeting of the Expert Group for Agricultural Markets –
Subgroup Arable Crops and Olive Oil

27 November 2025

Table of contents



World Oilseeds & Market News



Oilseeds & Protein crops: areas & production (2024/25 & 2025/26)

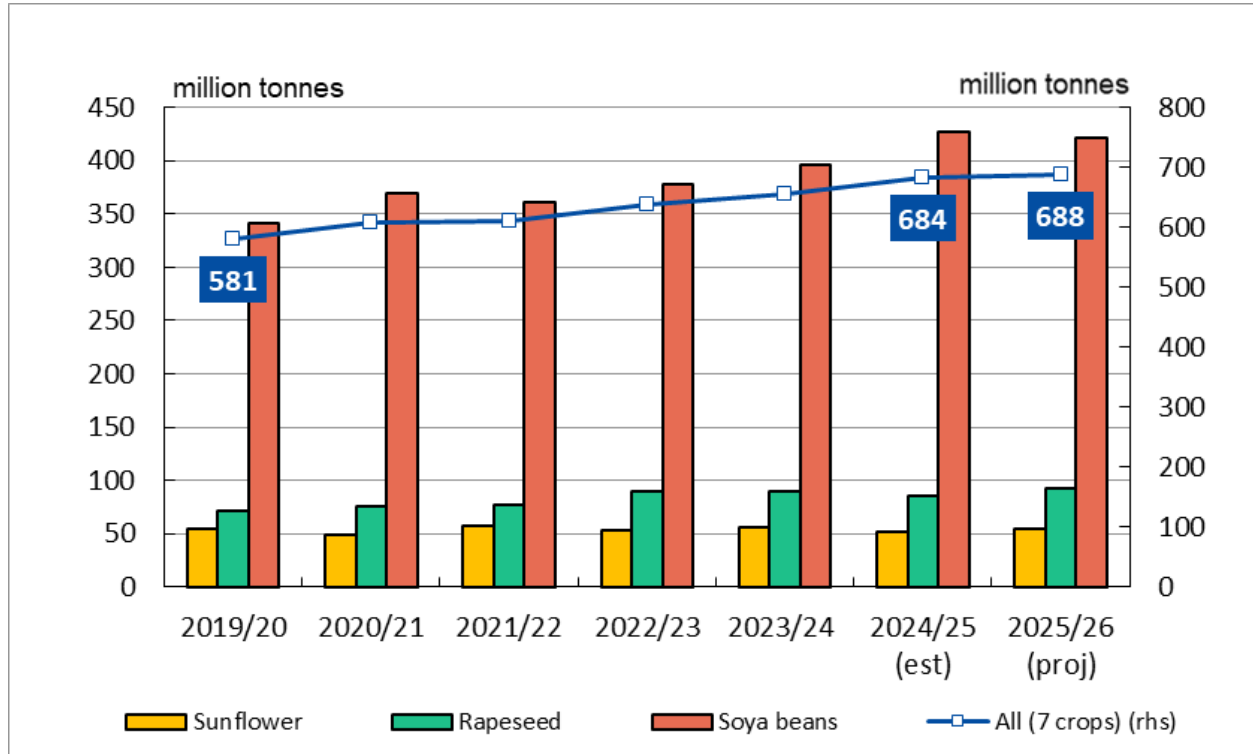


S&D balance sheets (Oilseeds, Meals, Oils)



EU imports from Ukraine

2025/26 World Oilseeds (USDA)

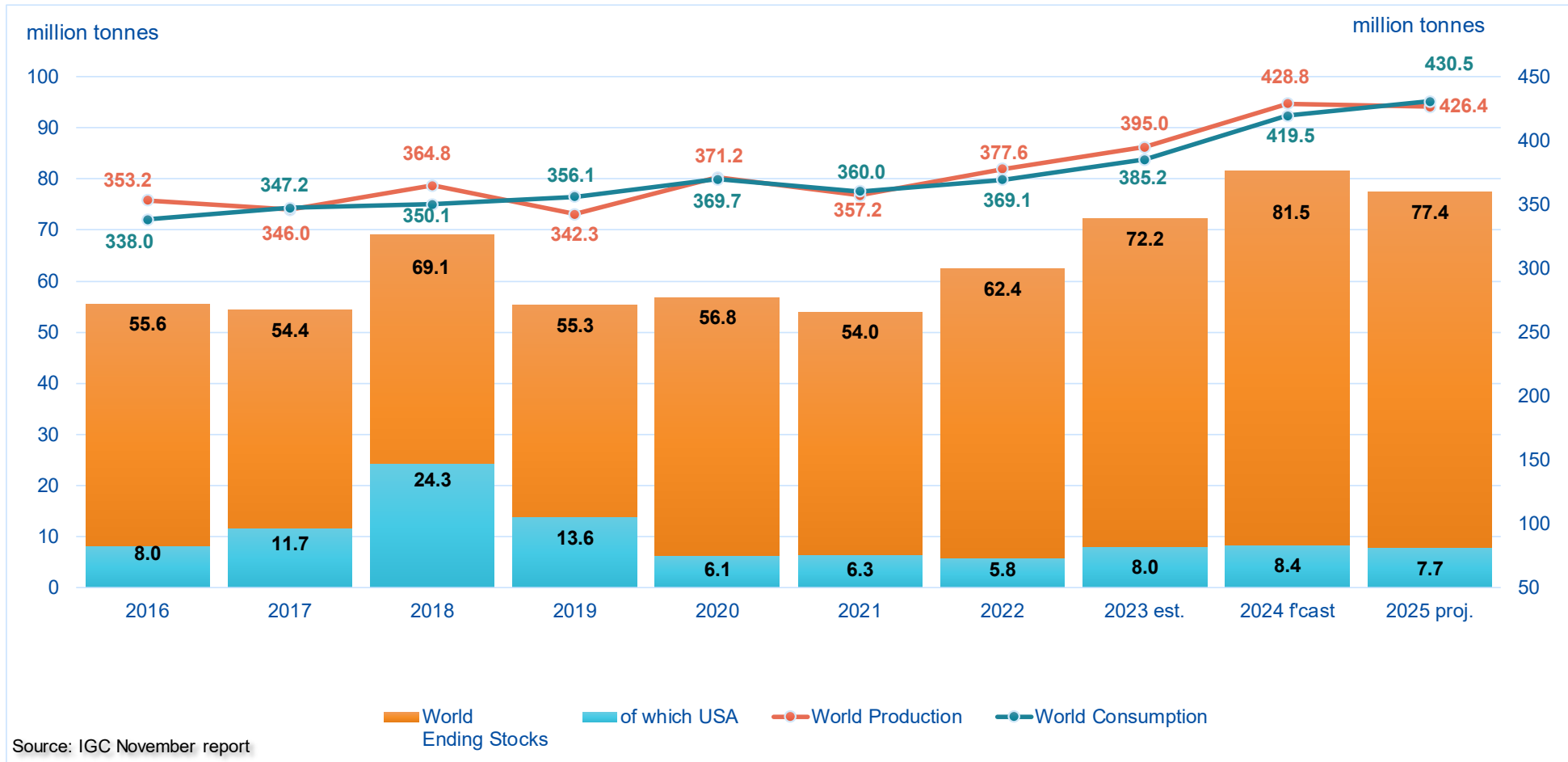


Source: USDA – November WASDE report

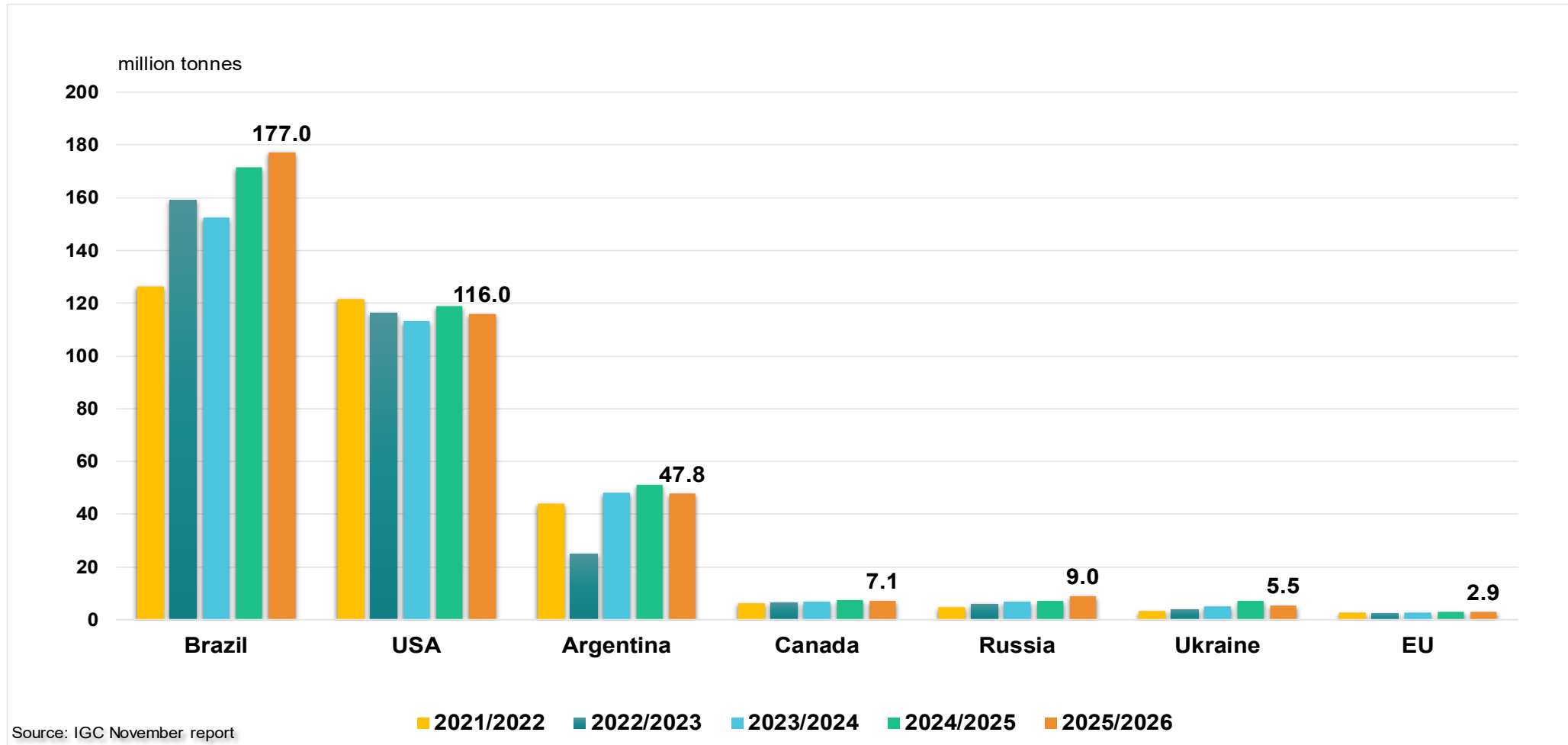
25/26 outlook (changes y/y):

Total Oilseeds:	688 mt (+4)	↑
• Soya beans:	422 mt	↓
• Rapeseed:	92 mt	↑
• Sunflower:	54 mt	↑

World soya: IGC



IGC: soya beans production forecast



Global Market [1]

November – IGC Report. Marketing year 2025/26:

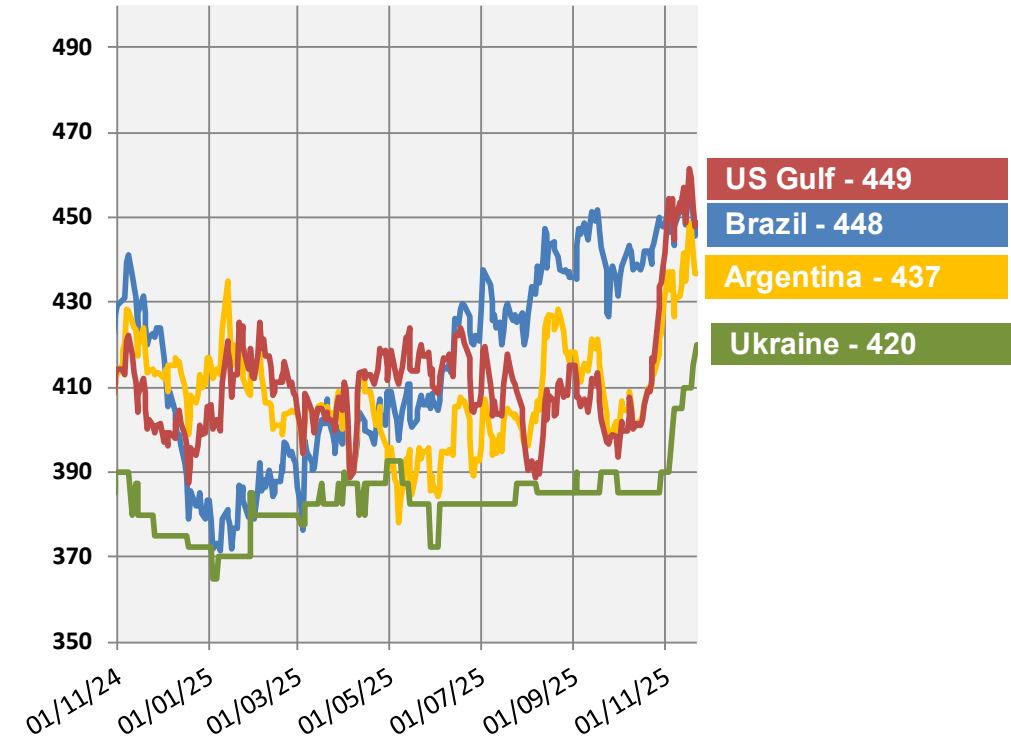
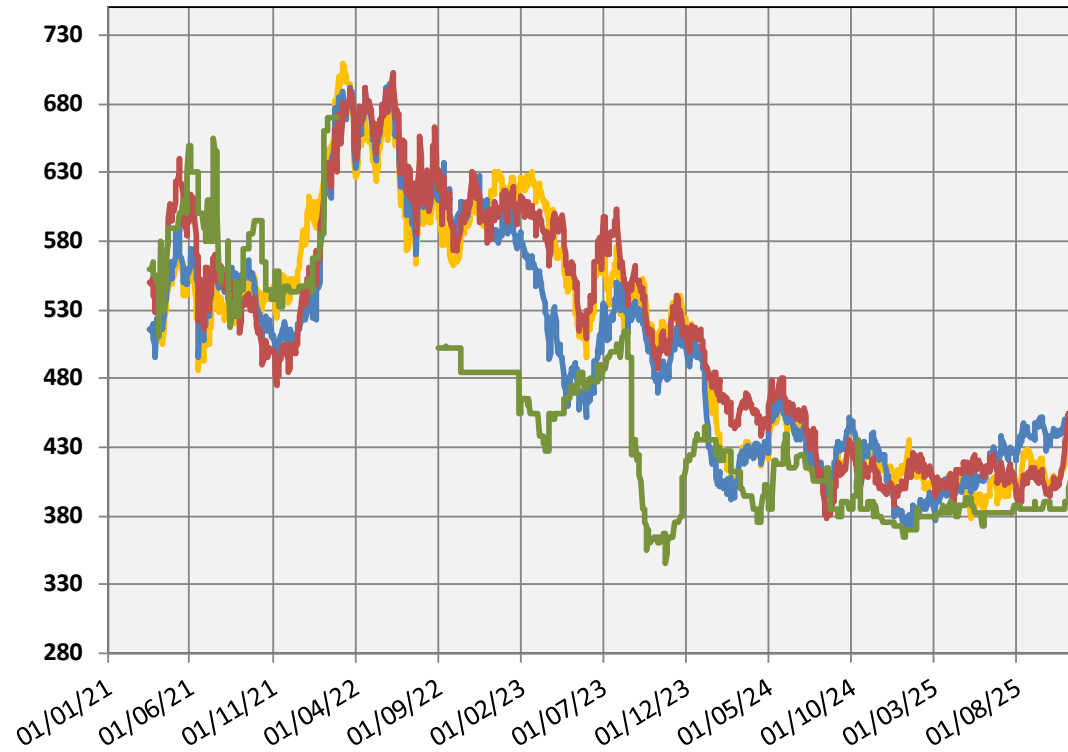
- Global **soya bean production** is marginally revised downward this month at 426 million tonnes, primarily due to reduced planted area in the US. In Brazil, production is anticipated at a record high, supported by expanded area. **Consumption** is marginally changed to an all-time high of 431 million tonnes (+2.6% year-on-year), boosted by strong global demand from the feed, food, and biofuel sectors. **Exports** are projected to increase by 1.6% year-on-year to 186.9 million tonnes, linked to record shipments to Asia and Africa. **Closing stocks** are trimmed by 5% year-on-year to at 77.4 million tonnes, owing to lower stocks in South America.
- **Rapeseed output** is estimated at 92.8 million tonnes, 6.7% higher than in 2024/25, supported by yield recovery in the EU, Canada, Australia, and Russia. Total **consumption** is projected at 92.7 million tonnes, owing to strong demand from the food, feed, and biofuel sectors. EU use is expected to rise to 25.5 million tonnes. **Trade** is marginally below the previous marketing year, reaching 17.8 million tonnes (-1.2% year-on-year), reflecting expectations of reduced shipments to the EU and China. **Total stocks** remain marginally above the previous season at 8.1 million tonnes (+1.8% year-on-year).

Global Market [2]

November – **IGC** Report. Marketing year **2025/26**:

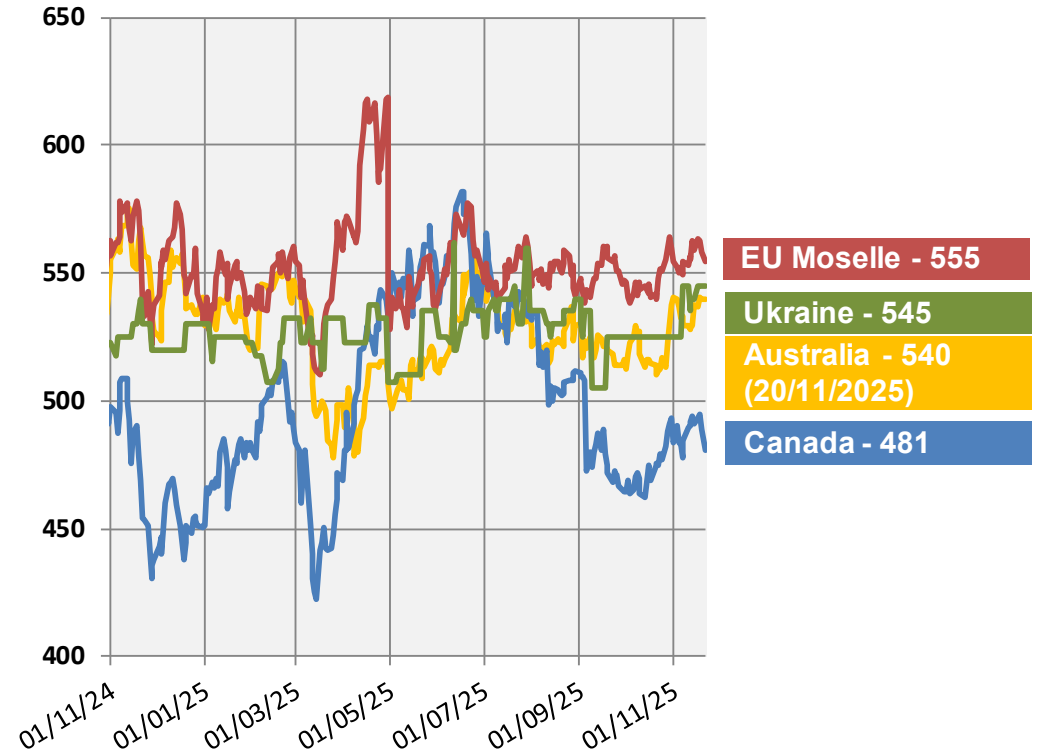
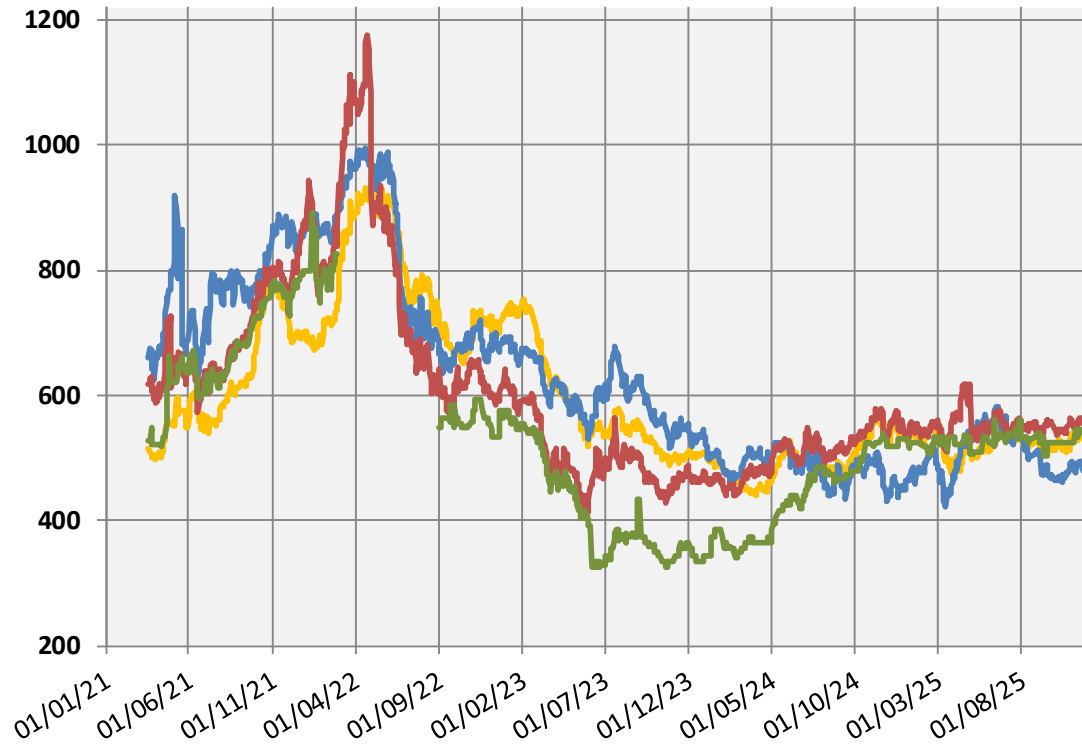
- This month, global **sunflower seed production** is adjusted downwards to 53.7 million tonnes, largely due to a decrease in yield in Ukraine. However, production is anticipated to rise by 4.4% compared to the previous year, as major producers are recovering from a prior poor harvest. **Trade** is expected to grow to 2.9 million tonnes (+4.7% year-on-year), driven by demand from Near-East Asia and the EU. Moldova, with a production of 0.9 million tonnes, is expected to maintain exports above average levels, predominantly to the EU.

World export prices for soya beans – (USD/tonne)



Source: International Grains Council
Latest prices referring to: 21/11/2025

World export prices for rapeseed – (USD/tonne)

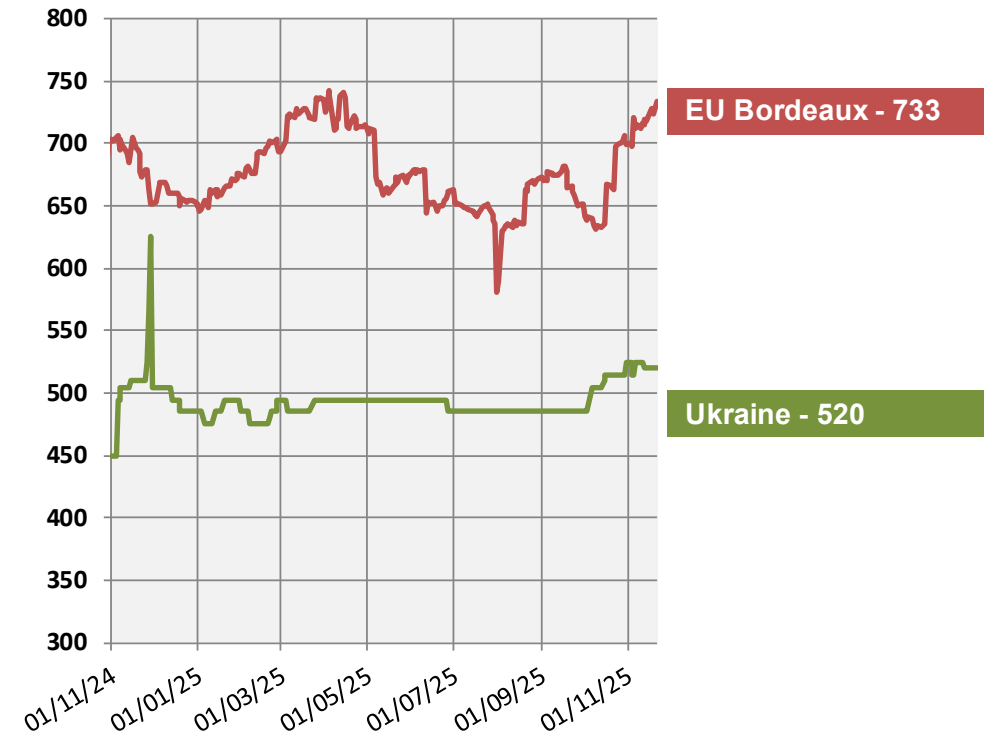


Source: International Grains Council
Latest prices referring to: 21/11/2025

World export prices for sunflower – (USD/tonne)



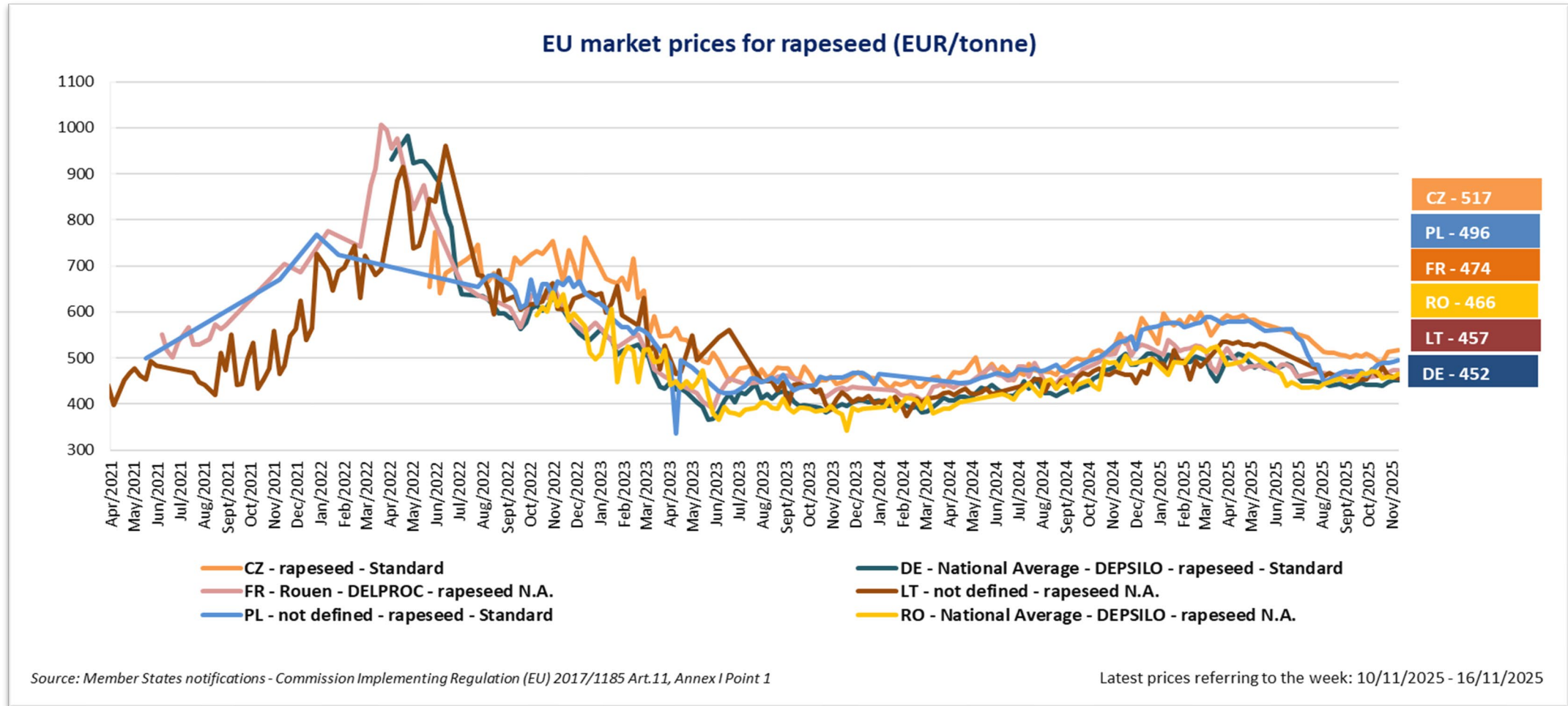
Source: International Grains Council
Latest prices referring to: 21/11/2025



Global Oilseed prices: key messages

- Average global **soya bean export prices**, measured by the IGC GOI sub-index, rose by 7% to their highest level in almost 18 months. Prices increased in most regions, but the rise was especially strong in the US due to optimism about US-China trade. In the **US**, **prices** increased by 8% to USD 449 per tonne while, in **Ukraine**, prices went up by 9% to reach USD 420. In South America, export prices also increased, but less sharply to USD 437 for **Argentina** (+6% m-o-m) and USD 448 for **Brazil** (+1% m-o-m).
- Mainly driven by higher soya bean-related prices, **Canadian** price for **rapeseed** slightly rose compared to last month (+1%) to USD 481. Farmers were slow to sell, which supported prices and outweighed the weak export demand. **EU** price also rose by 1% month-on-month to reach USD 555, the highest global quotation. **Ukraine** and **Australia** had a strong increase of 4% compared to last month to reach respectively USD 545 and USD 540.
- **Sunflower** seed prices increased by 5% month-on-month in the **EU** to reach USD 733 compared to **Ukraine** which only increased by 1%, reaching to USD 520 per tonne.

EU prices for rapeseed – (EUR/tonne)



EU prices for sunflower – (EUR/tonne)

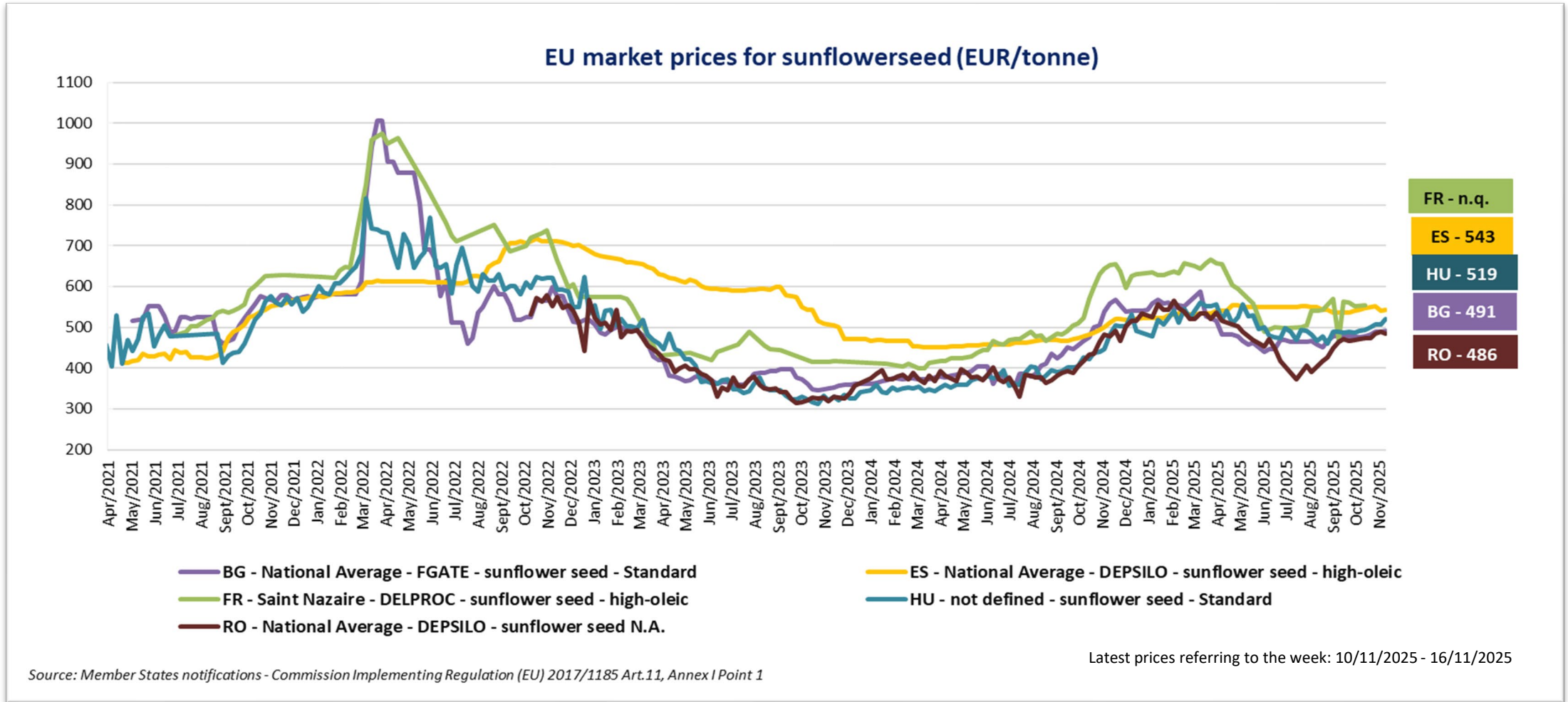


Table of contents



World Oilseeds & Market News



Oilseeds & Protein crops: areas & production (2024/25 & 2025/26)



S&D balance sheets (Oilseeds, Meals, Oils)



EU imports from Ukraine

EU oilseeds 2025/26 forecast

EU OILSEEDS AREA		<i>(million hectares)</i>				
	5-year trimmed average	2024/25	November	2025/26 vs. 2024/25 (%)	vs. 5-y AVG (%)	
Rapeseed	5,64	5,70	6,05	6,2	7,3	
Sunflower	4,62	4,79	4,75	-0,8	2,7	
Soya Beans	1,01	1,12	1,04	-6,8	3,5	
TOTAL	11,43	11,65	11,89	2,0	4,1	

EU OILSEEDS PRODUCTION		<i>(million tonnes)</i>				
	5-year trimmed average	2024/25	November	2025/26 vs. 2024/25 (%)	vs. 5-y AVG (%)	
Rapeseed	17,80	16,77	20,21	20,5	13,5	
Sunflower	9,37	8,33	8,52	2,3	-9,1	
Soya Beans	2,69	3,00	2,89	-3,5	7,8	
TOTAL	29,99	28,16	31,69	12,5	5,7	

Sources : EC - DG AGRI.

EU oilseeds and protein crops 2025/26 forecast

2025/2026		EU-27	EU-26	EU-14	EU-12	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	NL	AT	PL	PT	RO	SI	SK	FI	SE
Rapeseeds	Area	6.051	6.033	2.868	3.165	8	106	336	161	1.096	62	11	8	102	1.263	18	25	0	145	357	3	144	2	20	1.097	0	788	2	129	57	112
	Yield	3,34	3,34	3,61	3,10	3,90	2,73	3,06	4,34	3,64	2,73	4,86	2,05	2,77	3,67	2,94	2,65		2,37	2,80	3,76	2,89	4,46	3,27	3,30		3,16	2,62	3,48	1,41	3,63
	Production	20.206	20.153	10.341	9.812	33	289	1.026	698	3.988	169	56	16	283	4.630	53	67	0	344	1.000	11	415	7	65	3.622	0	2.493	6	448	80	405
Sunflower	Area	4.752	4.685	1.699	2.985	0	948	21	0	61	0	0	71	749	686	67	104	0	0	0	0	746	0	26	19	3	1.184	1	67	0	0
	Yield	1,79	1,78	1,72	1,82		1,70	2,79		2,47			2,23	1,12	2,09	2,77	2,46			0,00	1,86	2,38		2,84	2,34	1,80	1,48	2,30	2,69		
	Production	8.518	8.333	2.915	5.418	0	1.611	58	0	150	0	0	157	836	1.435	185	256	0	0	0	0	1.775	0	75	44	5	1.749	1	180	0	0
Soja	Area	1.043	947	591	356	0	1	34	0	41	0	0	2	3	150	96	308	0	0	1	0	99	0	87	28	0	129	2	62	0	0
	Yield	2,78	2,81	3,18	2,18		1,26	2,62		3,28			1,22	3,05	2,58	2,49	3,53			1,36	0,00	2,12		3,01	2,55		1,90	2,65	2,43		
	Production	2.895	2.656	1.882	774	0	1	89	0	134	0	0	2	9	387	239	1.087	0	0	2	0	209	0	262	71	0	245	6	151	0	0
Linseed	Area	42	42	32	10	0	1	2	0	4	0	0	0	1	23	0	0	0	0	1	0	2	0	1	2	0	2	0	1	1	2
	Yield	1,64	1,64	1,75	1,28	0,00	0,91	1,30		1,79	1,03	0,00	3,36	0,84	1,85					1,08	0,83		1,36		1,21	1,48		1,49	0,98	0,89	1,59
	Production	69	69	56	13	0	1	2	0	8	0	0	0	1	42	0	0	0	0	1	0	2	0	2	4	0	2	0	1	1	3
Total oilseeds	Area	11.888	11.707	5.191	6.516	9	1.055	392	161	1.202	62	11	80	855	2.122	181	438	0	145	359	3	990	2	135	1.146	3	2.103	5	258	57	114
	Yield	2,67	2,67	2,93	2,46	3,87	1,80	3,00	4,34	3,56	2,73	4,84	2,19	1,32	3,06	2,64	3,22		2,37	2,79	3,60	2,42	4,46	3,00	3,26	1,80	2,14	2,60	3,02	1,41	3,60
	Production	31.688	31.211	15.194	16.017	33	1.901	1.175	698	4.280	169	56	176	1.129	6.494	477	1.410	0	345	1.003	12	2.401	7	404	3.740	5	4.490	13	780	81	409
Field peas	Area	1.030	1.029	606	423	1	15	45	8	138	50	1	21	180	150	1	17	0	47	102	0	16	0	7	35	15	99	0	14	45	23
	Yield	2,39	2,39	2,66	2,01	2,76	1,67	2,46	3,31	3,21	1,30	5,07	1,47	1,70	3,59	1,50	3,00		2,58	2,36	4,32	2,54		2,56	2,30	1,25	1,28	2,25	2,81	2,29	2,88
	Production	2.460	2.459	1.609	850	3	25	112	27	441	65	4	31	306	539	1	52	0	120	241	1	41	0	17	79	18	127	1	40	102	68
Broad beans	Area	535	528	330	197	1	0	2	19	66	16	14	1	30	112	8	52	0	36	92	0	1	4	6	42	3	8	0	0	6	15
	Yield	2,76	2,77	2,82	2,68	3,78		1,99	4,02	3,44	2,70	5,40	2,69	1,27	2,69	1,99	2,13	2,60	3,16	2,67	2,50	1,53	4,27	2,48	2,71	1,30	0,92		1,43	2,34	2,93
	Production	1.477	1.462	932	529	5	0	5	76	228	43	75	4	38	301	16	112	0	115	245	0	1	18	16	113	3	8	0	0	15	44
Lupins	Area	226	226	53	173	0	0	1	2	28	0	0	13	3	4	0	1	0	0	6	0	0	0	1	165	2	0	0	0	0	0
	Yield	1,88	1,88	1,77	1,91			1,82	3,30	2,03			1,26	0,92	2,22		1,68			0,86	0,00	2,00		1,53	1,95	0,80	0,89	0,91			
	Production	424	424	94	330	0	0	3	5	57	0	0	16	3	8	0	2	0	0	5	0	0	0	1	322	1	0	0	0	0	0
Total protein crops	Area	1.791	1.782	989	793	2	15	49	29	232	66	15	35	214	266	9	71	0	83	199	0	17	4	14	242	19	108	0	14	51	38
	Yield	2,44	2,44	2,66	2,16	3,33	1,67	2,42	3,78	3,13	1,64	5,38	1,44	1,63	3,19	1,94	2,33	2,60	2,83	2,46	3,64	2,48	4,27	2,48	2,13	1,22	1,25	2,25	2,79	2,30	2,90
	Production	4.362	4.345	2.635	1.710	7	25	119	108	726	107	78	51	348	848	17	165	0	235	491	1	43	18	34	515	23	135	1	40	117	111
Oilseeds and protein crops	Area	13.679	13.489	6.180	7.310	11	1.070	441	189	1.433	128	26	115	1.068	2.388	190	509	0	228	559	4	1.007	6	148	1.388	22	2.210	5	273	108	152
	Yield	2,64	2,64	2,89	2,43	3,76	1,80	2,93	4,26	3,49	2,17	5,14	1,96	1,38	3,08	2,61	3,10	2,60	2,54	2,67	3,61	2,43	4,33	2,95	3,07	1,29	2,09	2,58	3,01	1,83	3,42
	Production	36.050	35.556	17.829	17.727	40	1.926	1.158	807	5.006	276	134	227	1.477	7.343	494	1.576	0	580	1.493	13	2.444	25	438	4.255	28	4.625	14	820	198	520

EU Oilseeds 2025/26: key messages

EU Oilseeds 2025/26

- Compared with September, the **EU oilseed area** remains month-on-month at 11.9 million hectares. **Sunflower seed** is estimated at 4.8 million hectares, rapeseed at 6.1 millions hectares while **soya bean area** remains stable at 1.0 million hectares.
- Overall **EU oilseed production** for the current season is revised upward to 31.7 million tonnes (5.7% above the long-term average). A small decline in **sunflower seed** output in France brings total production at 8.5 million tonnes (9.1% below the long-term average). **Rapeseed** production is projected at 20.2 million tonnes (13.5% above the long-term average).

Table of contents



World Oilseeds & Market News



Oilseeds & Protein crops: areas & production (2024/25 & 2025/26)



S&D balance sheets (Oilseeds, Meals, Oils)



EU imports from Ukraine

Oilseeds balance sheet (EU)

OILSEEDS SUPPLY & DEMAND

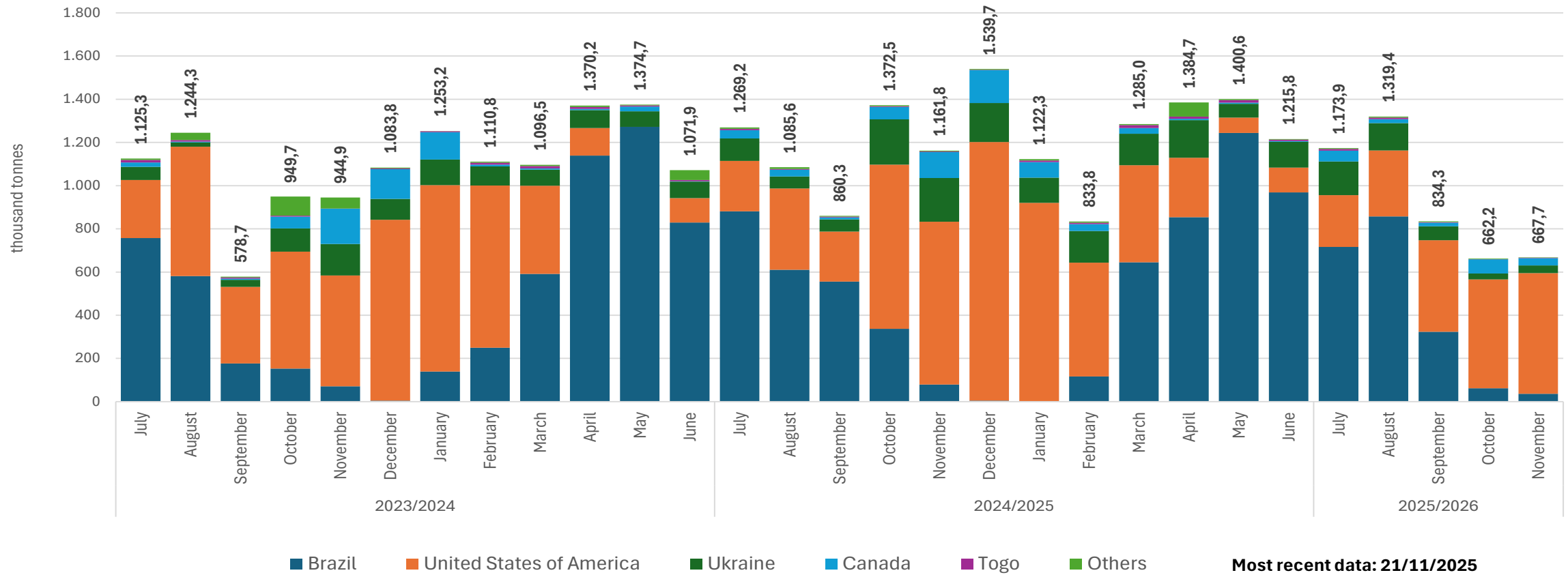
(thousand metric tonnes)

	2024/25 fc.				2025/26 proj.			
<i>last updated: 27/11/2025</i>	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	833	1.300	878	3.011	833	1.300	878	3.011
Usable production	16.765	3.001	8.326	28.092	20.206	2.895	8.518	31.619
Area (thousand ha)	5.699	1.119	4.791	11.609	6.051	1.043	4.752	11.846
Yield (tonnes/ha)	2,94	2,68	1,74	2,42	3,34	2,78	1,79	2,67
Imports (from third countries)	7.964	14.505	628	23.096	5.500	14.000	800	20.300
Total supply	25.563	18.806	9.831	54.200	26.539	18.195	10.196	54.930
Domestic use	24.347	17.142	8.219	49.708	25.266	16.661	8.782	50.710
<i>of which crushing</i>	<i>(23.831)</i>	<i>(14.941)</i>	<i>(7.178)</i>	<i>(45.949)</i>	<i>(24.722)</i>	<i>(14.485)</i>	<i>(7.726)</i>	<i>(46.934)</i>
Exports (to third countries)	382	364	734	1.481	439	234	536	1.209
Total use	24.729	17.506	8.954	51.189	25.706	16.895	9.318	51.919
Ending stocks	833	1.300	878	3.011	833	1.300	878	3.011
Change in stocks	-	-	-	-	-	-	-	-

Sources : EC – DG AGRI

Soya bean imports (EU)

EU - Imports of Soya beans



Source: Taxud Surveillance

Oilmeals balance sheet (EU)

OILSEED MEALS SUPPLY & DEMAND

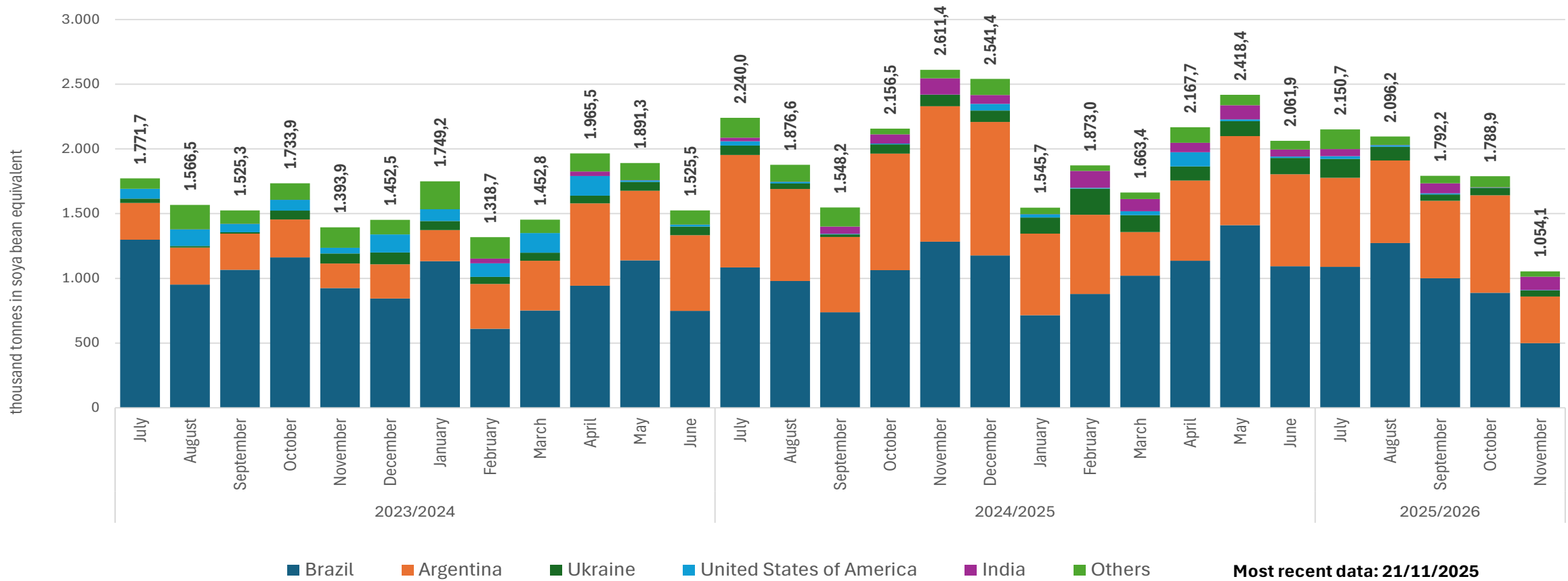
(thousand metric tonnes)

	2024/25 fc.				2025/26 proj.			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
<i>last updated: 27/11/2025</i>								
Beginning stocks	50	342	100	492	50	342	100	492
Usable production	13.583	11.803	3.948	29.334	14.092	11.443	4.250	29.784
Imports (from third countries)	420	20.110	2.660	23.189	623	17.000	2.700	20.323
Total supply	14.053	32.255	6.707	53.016	14.764	28.785	7.050	50.599
Domestic use	13.123	31.385	6.066	50.573	13.965	27.933	6.410	48.307
Exports (to third countries)	880	528	542	1.950	750	510	540	1.800
Total use	14.003	31.913	6.607	52.524	14.714	28.443	6.950	50.107
Ending stocks	50	342	100	492	50	342	100	492
Change in stocks	-	0	-	0	-	-	-	-

Sources : EC – DG AGRI

Soya bean meal imports (EU)

EU - Imports of Soya meal



Source: Taxud Surveillance

Most recent data: 21/11/2025

Vegetable oils balance sheet (EU)

VEGETABLE OILS SUPPLY & DEMAND

(thousand metric tonnes)

	2024/25 fc.					2025/26 proj.				
	Rapeseed	Soya beans	Sunflower	Palm	TOTAL	Rapeseed	Soya beans	Sunflower	Palm	TOTAL
<i>last updated: 27/11/2025</i>										
Beginning stocks	592	175	271	488	1.525	592	175	271	487	1.525
Usable production	9.771	2.988	3.015	0	15.773	10.136	2.897	3.245	0	16.278
Imports (from third countries)	295	705	2.544	3.379	6.923	300	506	2.300	2.500	5.606
Total supply	10.657	3.868	5.830	3.867	24.222	11.028	3.578	5.816	2.987	23.409
Domestic use	9.480	2.929	4.845	3.258	20.513	9.851	2.763	4.975	2.348	19.937
Exports (to third countries)	585	764	713	121	2.184	585	640	570	152	1.947
Total use	10.065	3.693	5.559	3.380	22.697	10.436	3.403	5.545	2.500	21.884
Ending stocks	592	175	271	487	1.525	592	175	271	487	1.525
Change in stocks	0	-	0	0	0	0	-	0	-	0

Sources : EC – DG AGRI

Balance sheets 2025/26 (EU)

Changes from previous Committee meeting

- In November, there were only minor adjustments to the **oilseed balance** as regards the production and the consumption and no adjustments as regards trade for the marketing year 2025/26. **Rapeseed imports** remain at 5.5 million tonnes, **soya bean imports** at 14.0 million tonnes and **sunflower seed** at 0.8 million tonnes, bringing total **oilseed imports** to 20.3 million tonnes (6.5% below the five-year average).
- **EU oilseed meal production** for 2025/26 increased slightly to 29.8 million tonnes (+155 000 tonnes month-on-month mostly because of better rapeseed prospects). **Trade** projections did not change compared to October, representing 20.3 million tonnes of oilseed meals.
- **Vegetable oil production** is revised at 16.3 million tonnes (+105 000 tonnes month-on-month). Here also **trade** remains unchanged compared to October.

Table of contents



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S&D balance sheets (Oilseeds, Meals, Oils)

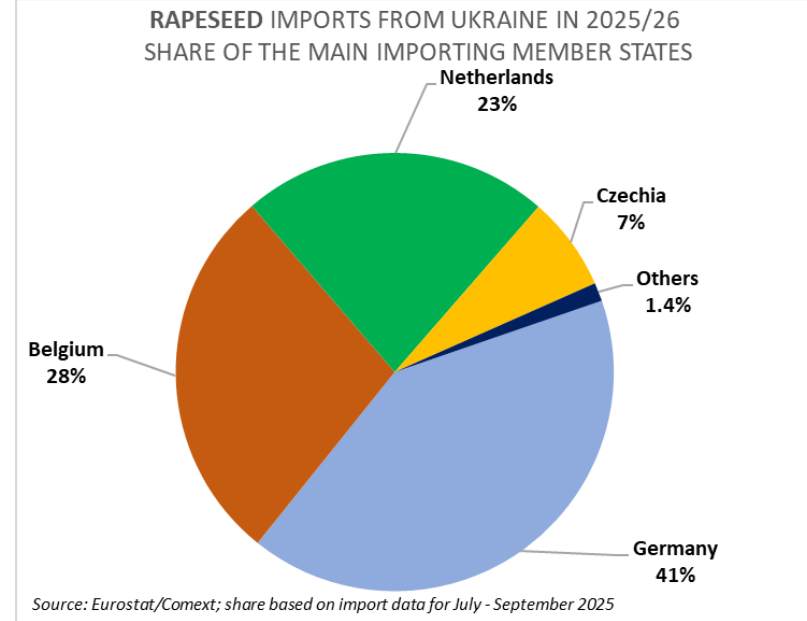
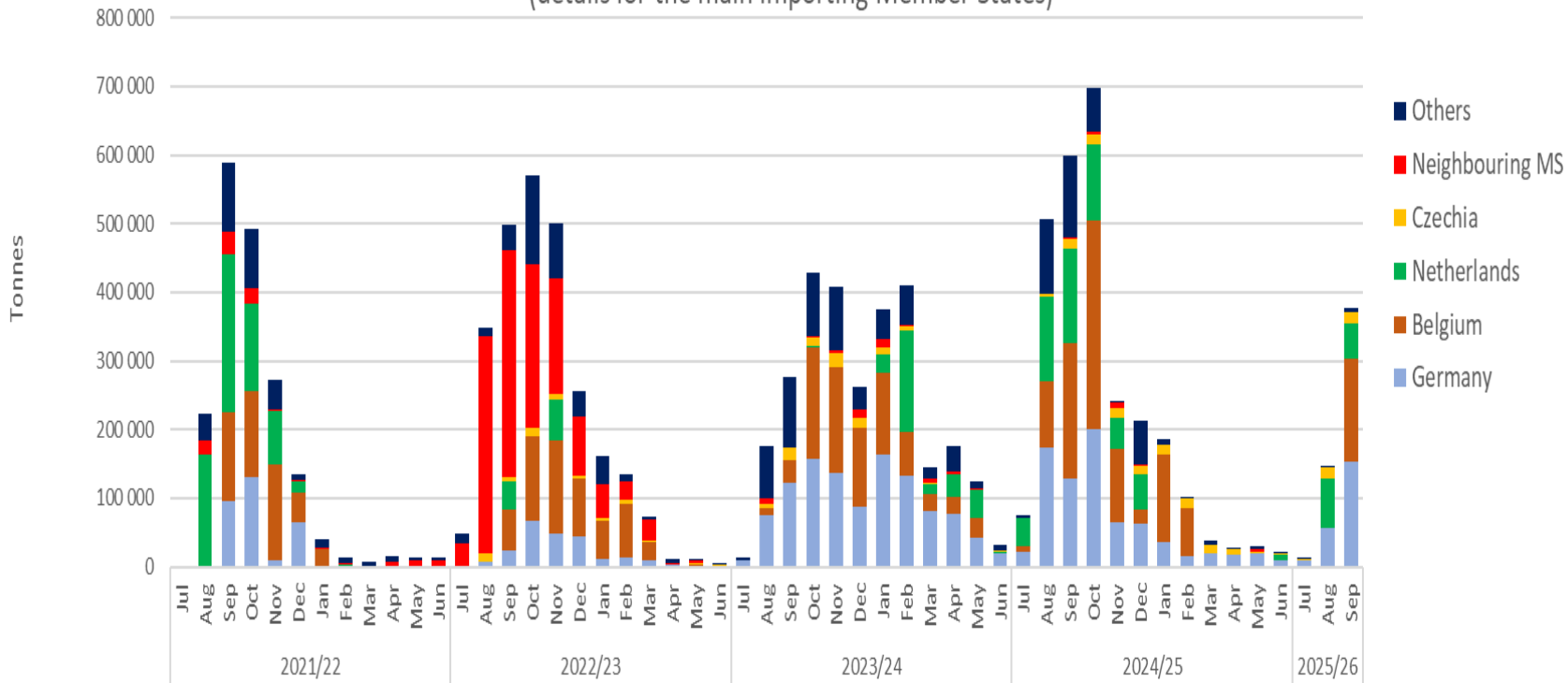


EU imports from Ukraine

EU imports from Ukraine – rapeseed (in tonnes)

(1/5)

EU monthly imports of rapeseed from Ukraine
(details for the main importing Member States)



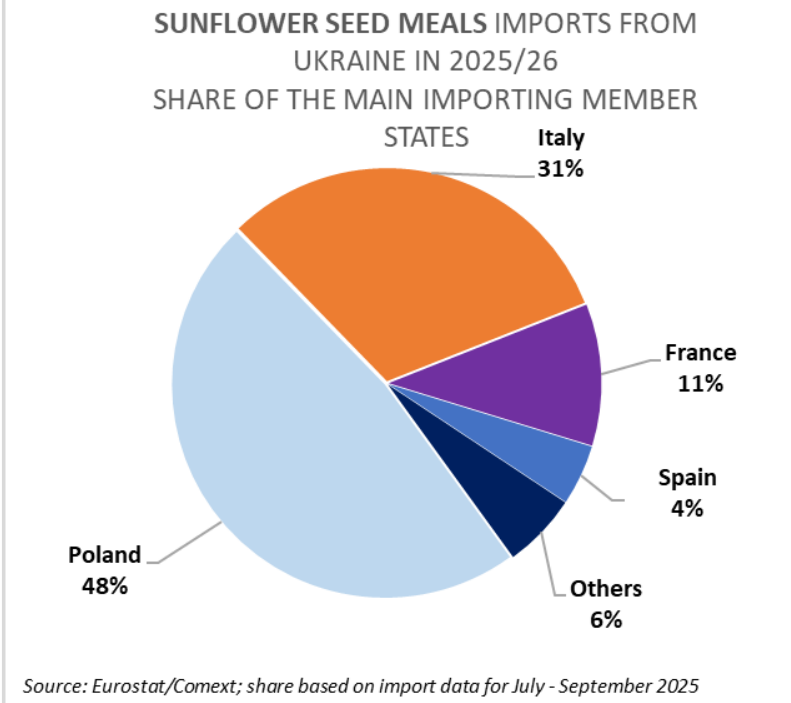
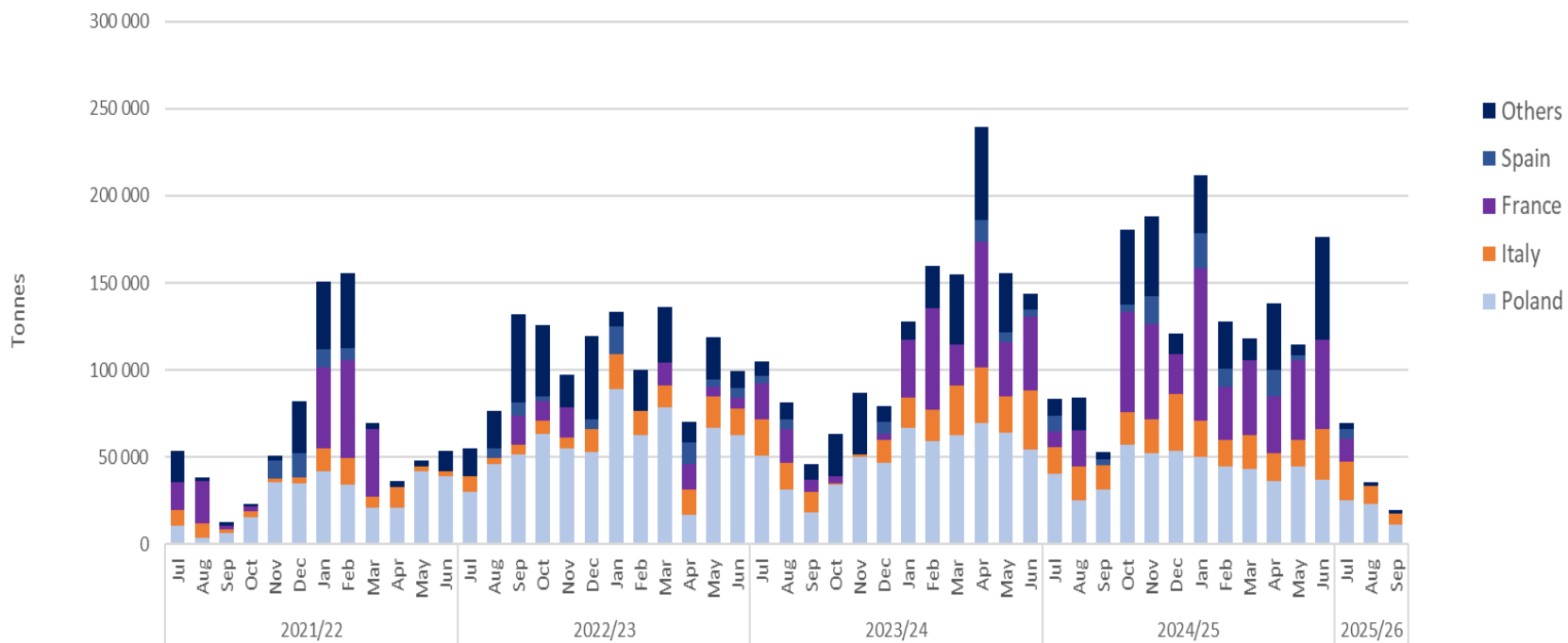
Source: Eurostat/Comext; share based on import data for July - September 2025

Source: Eurostat/Comext

EU imports from Ukraine – sunflower seed meals (in tonnes)

(2/5)

EU monthly imports of **sunflower seed meals** from Ukraine
(details for the main importing Member States)

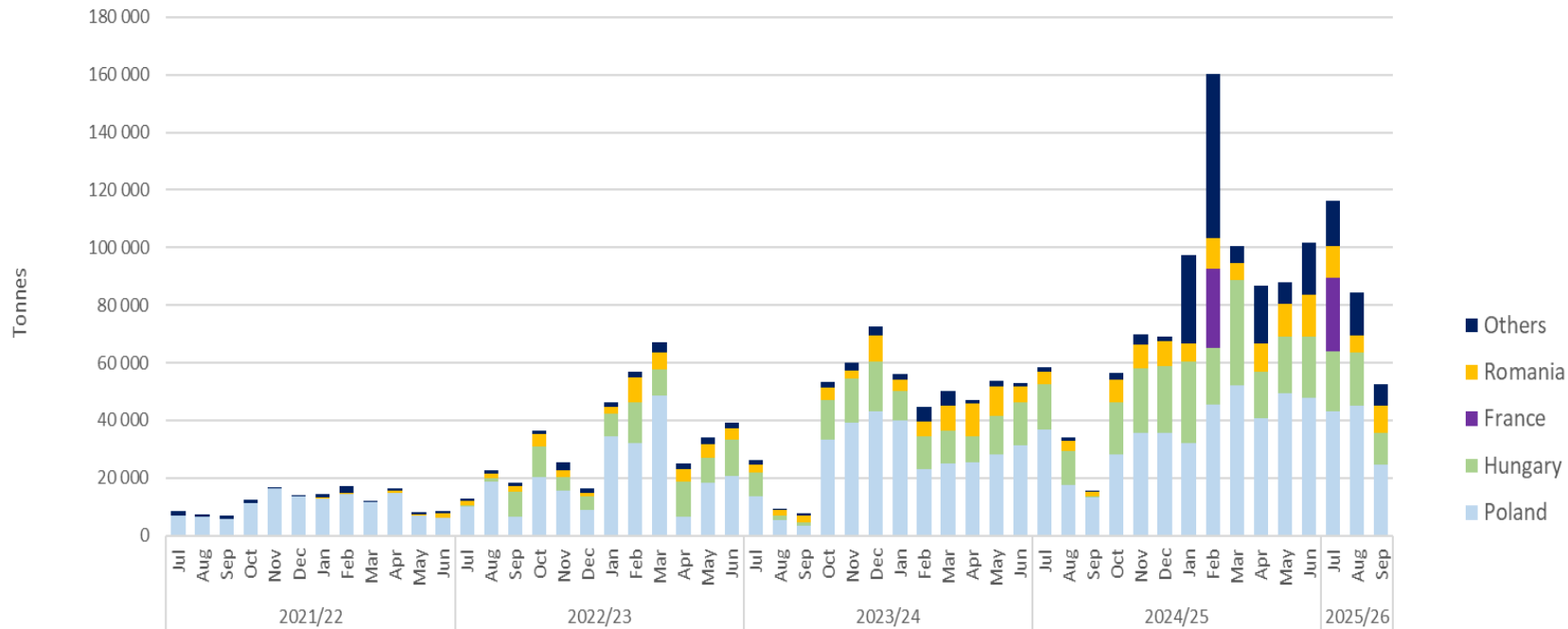


Source: Eurostat/Comext; share based on import data for July - September 2025

EU imports from Ukraine – soya bean meals (in tonnes)

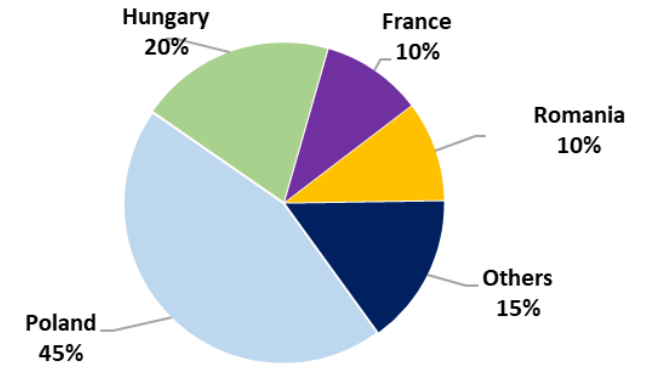
(3/5)

EU monthly imports of **soya bean meals** from Ukraine
(details for the main importing Member States)



Source: Eurostat/Comext

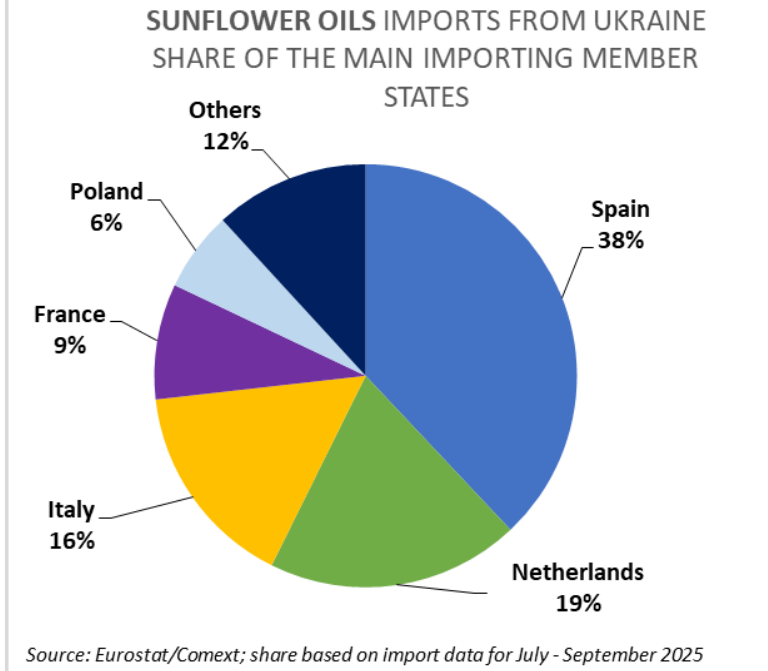
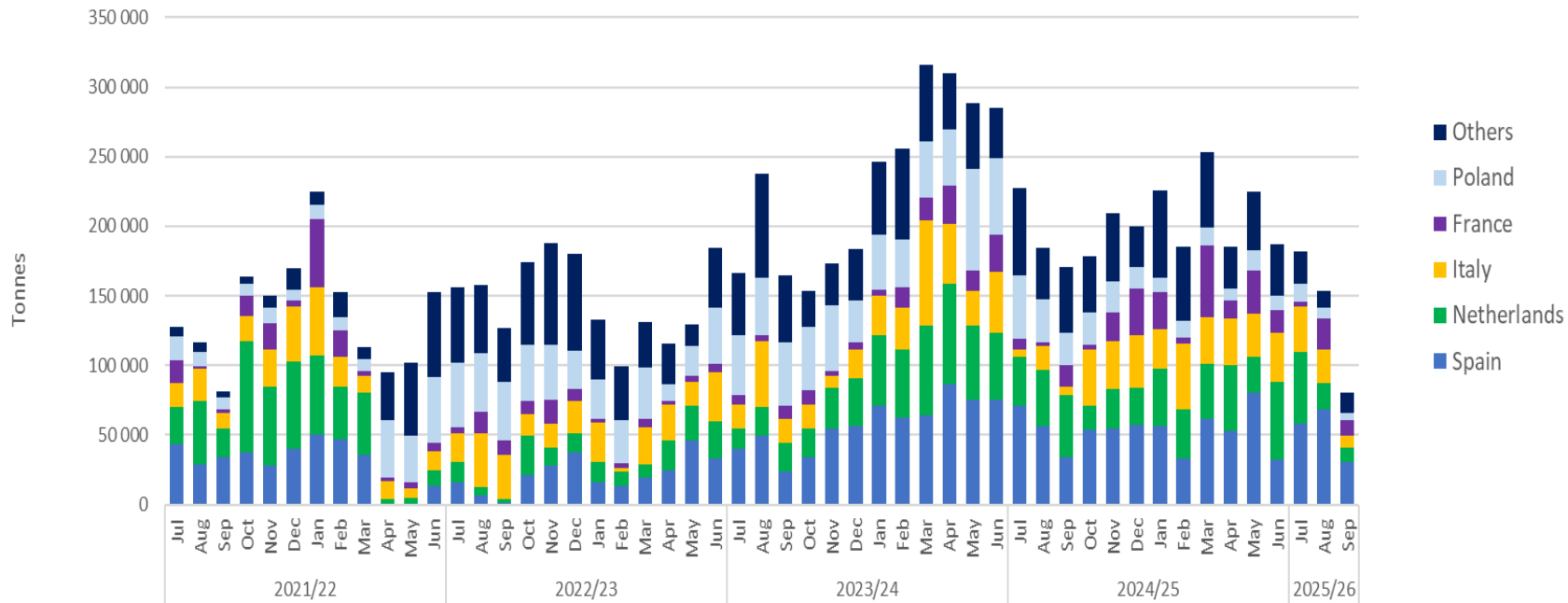
SOYA BEAN MEALS IMPORTS FROM UKRAINE IN
2025/26
SHARE OF THE MAIN IMPORTING MEMBER STATES



Source: Eurostat/Comext; share based on import data for July - September 2025

EU imports from Ukraine – sunflower seed oils (in tonnes) (4/5)

EU monthly imports of **sunflower oils** from Ukraine
(details for the main importing Member States)

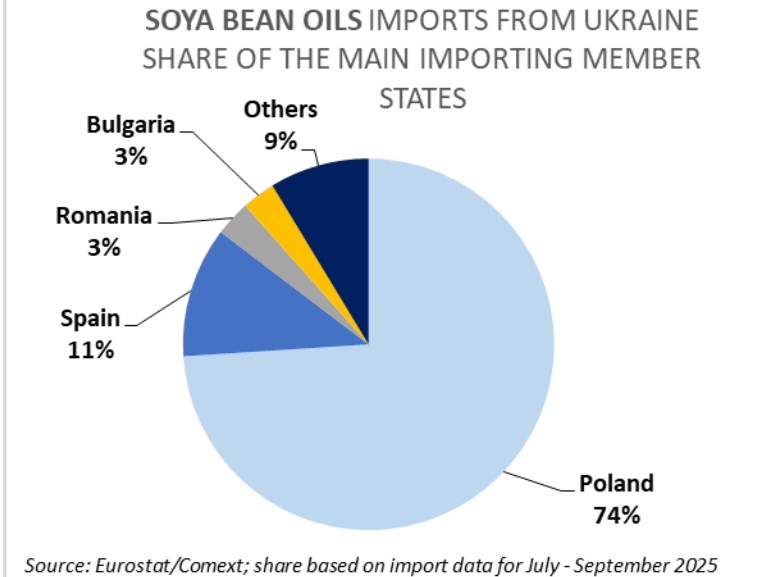
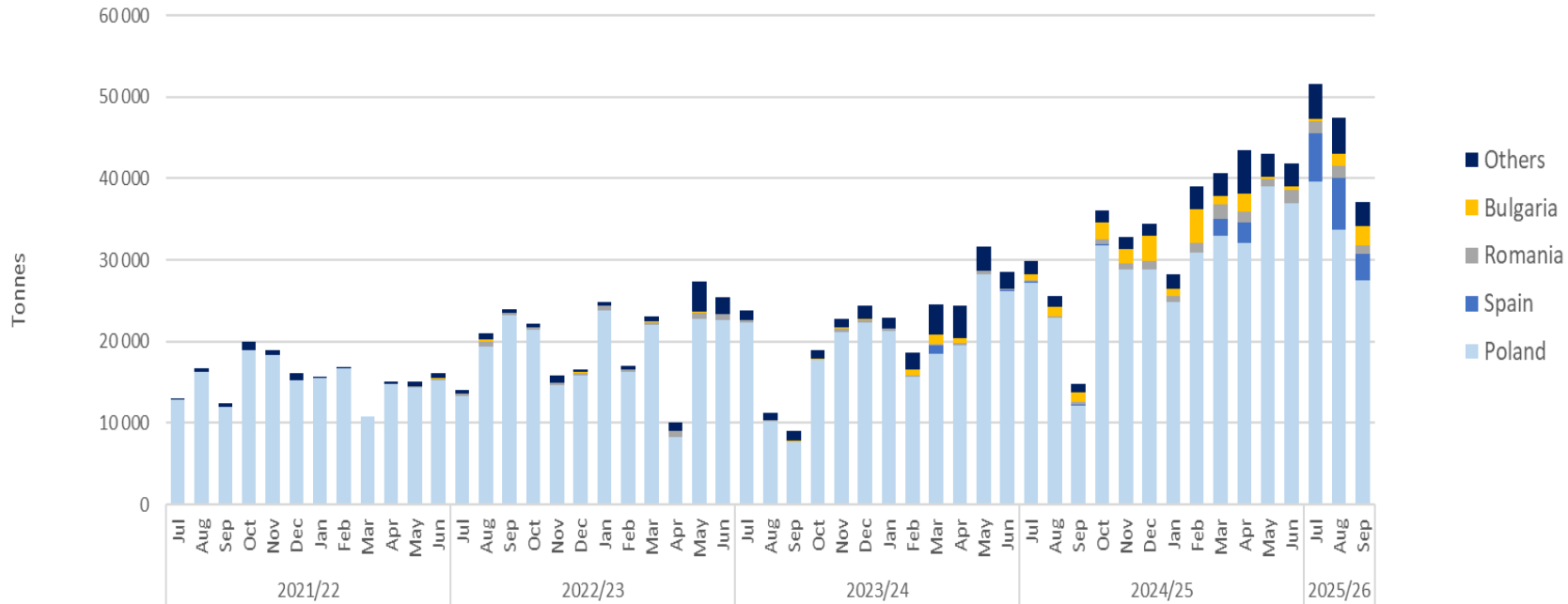


Source: Eurostat/Comext; share based on import data for July - September 2025

Source: Eurostat/Comext

EU imports from Ukraine – soya bean oils (in tonnes) (5/5)

EU monthly imports of **soya bean oils** from Ukraine
(details for the main importing Member States)



Source: Eurostat/Comext; share based on import data for July - September 2025

Thank you!

Market data for the cereals, oilseeds and protein crops are available at the EU Crops Market Observatory
<https://ec.europa.eu/agriculture/market-observatory/crops>

The United Kingdom is no longer a Member State of the European Union, however, where it is deemed relevant (e.g. for comparison purposes), an EU+UK aggregate is still displayed.



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