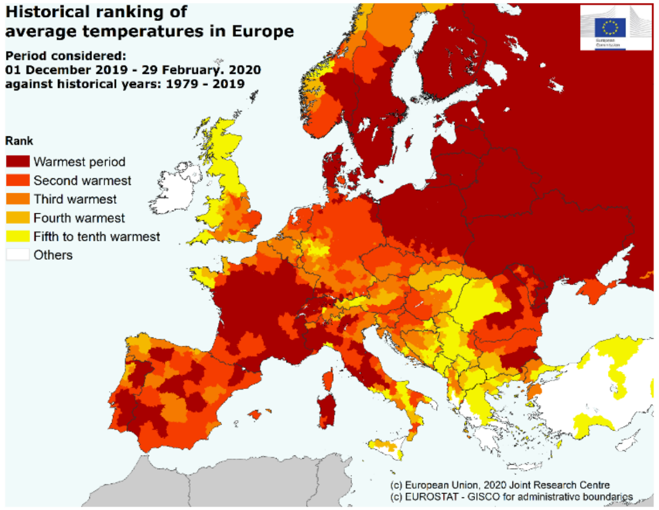
Cereals, Oilseeds and Protein Crops

Market Situation

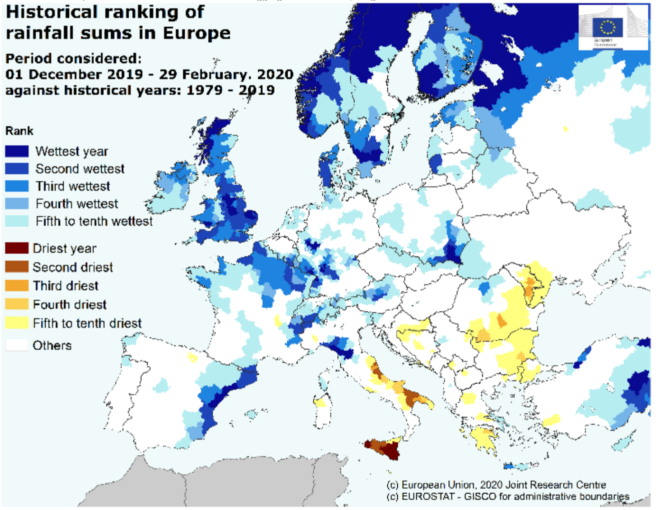
CROPS Market Observatory

3 April 2020

Agro-weather conditions
winter review (Jan, Feb, Mar)



Data source: temperature data from MARS CGMS DB aggregated at NUTS3, weighted on arable land.



Data source: rainfall data from MARS CGMS DB aggregated at NUTS3, weighted on arable land.

- **exceptional mild winter**
  - warmest on records in many regions
  - highest anomalies in Northern and Eastern regions
  - substantial reduction in number of cold days

- **excessively wet in north-western Europe** (while dry in a few EU regions)
  - long-lasting wet conditions in FR, BE, NL, DE, DK
  - exceptionally dry in southern IT; lack of rain in parts of ES, EL, and parts of RO and BG

Areas of concern / Crop development

➢ **Weather events / Areas of concern**

- **rain deficit:** still dry in south-eastern Europe (eastern RO, northern BG), and in durum wheat main producing regions (southern IT; parts of ES, EL)
- **excessive rain:** long-lasting wet conditions in parts of north-western Europe (FR, BE, NL, LU, DE, DK), which hampered winter corps establishment before and now affecting spring crops

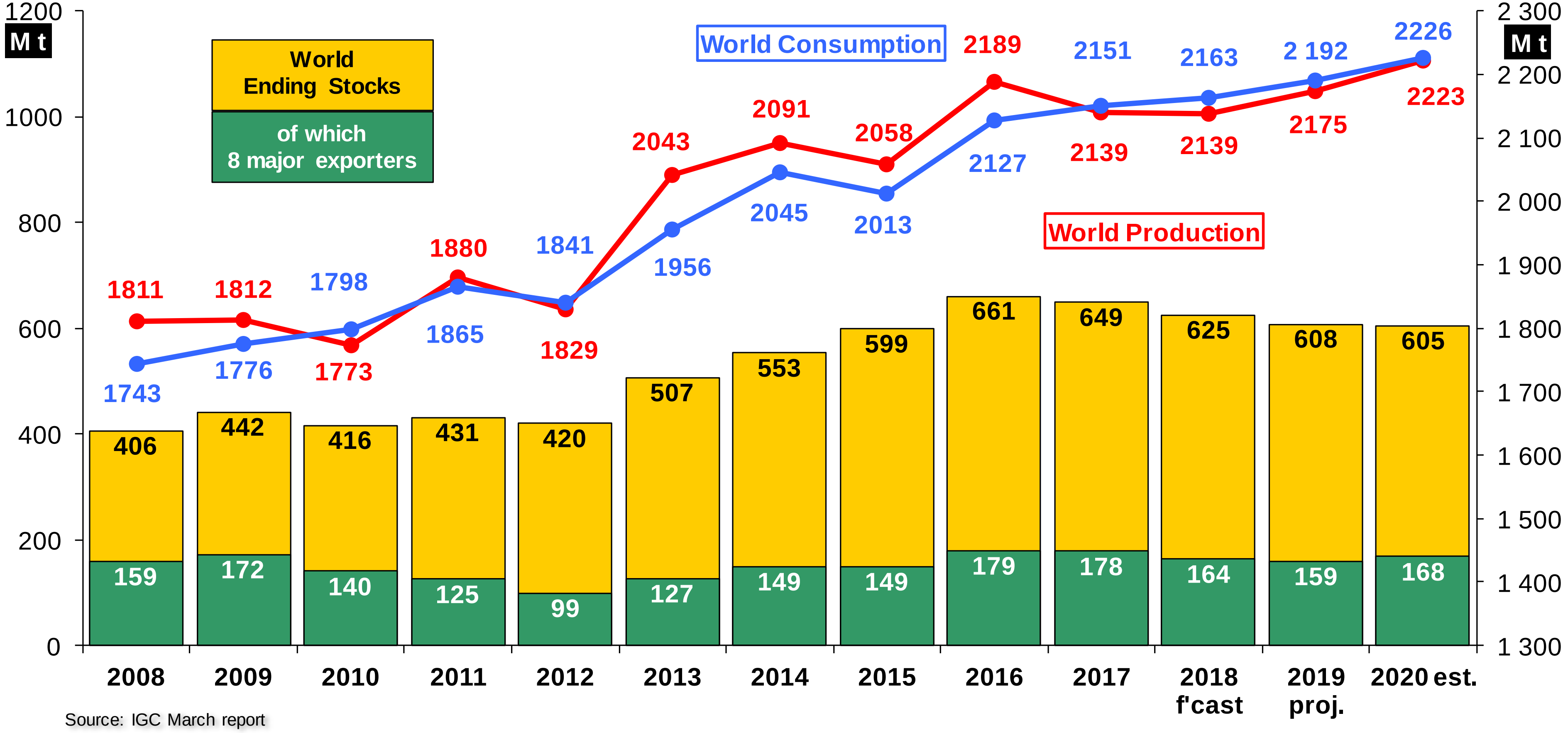
➢ **Crop development**

- **winter cereals:** advanced development, in good conditions
- **spring cereals:** sowings delayed in some areas by wet conditions
- **pastures**: good conditions (high biomass formation in northern and western Europe) with a few exceptions (EL, southern IT, parts of ES and PT)

World Cereals Market

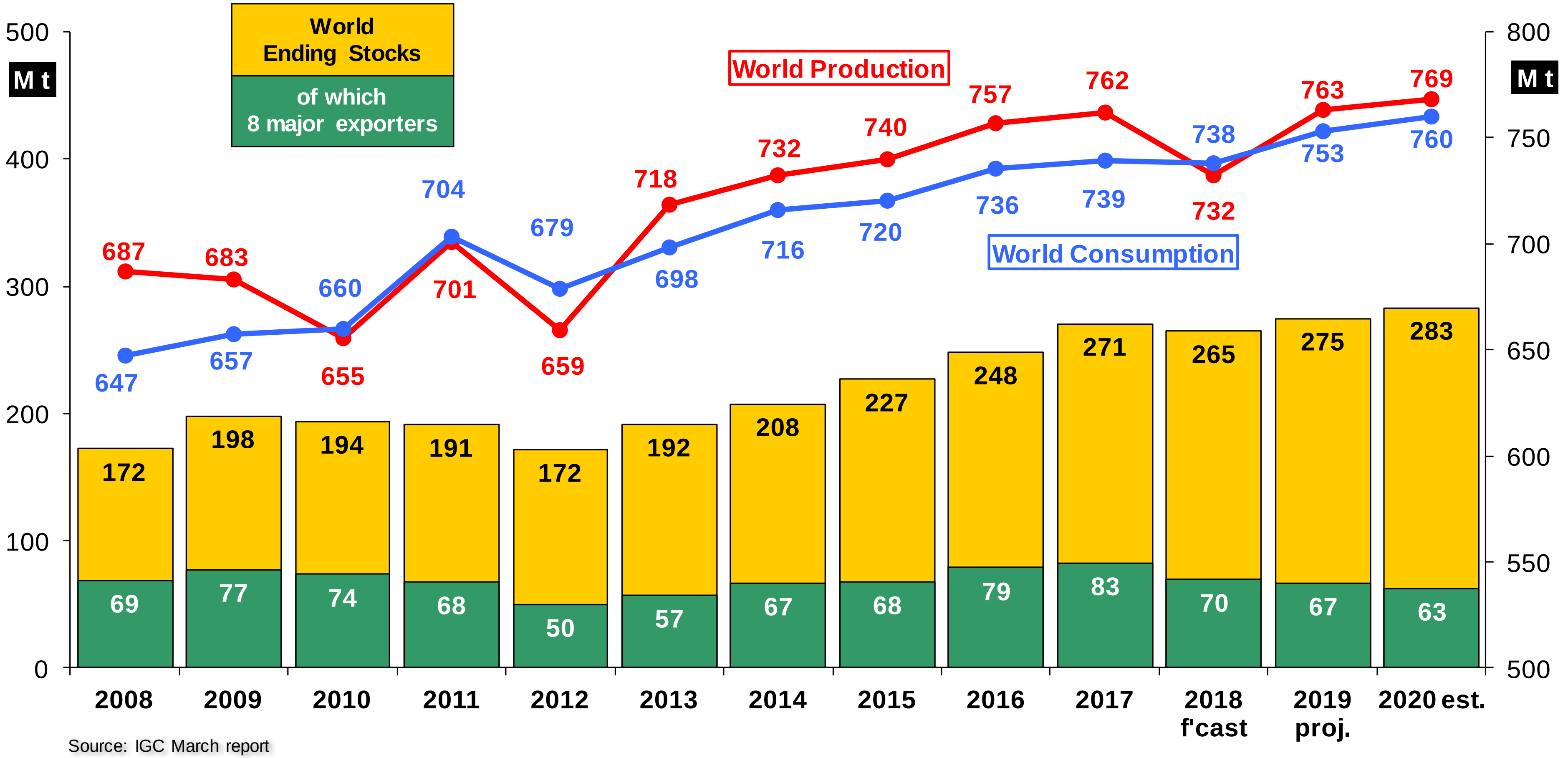
- International Grains Council 2020/21 projections
- USDA 2020 Prospective Plantings Report
- Export restrictions in the Black Sea region

World cereals: IGC



European Commission

World wheat: IGC



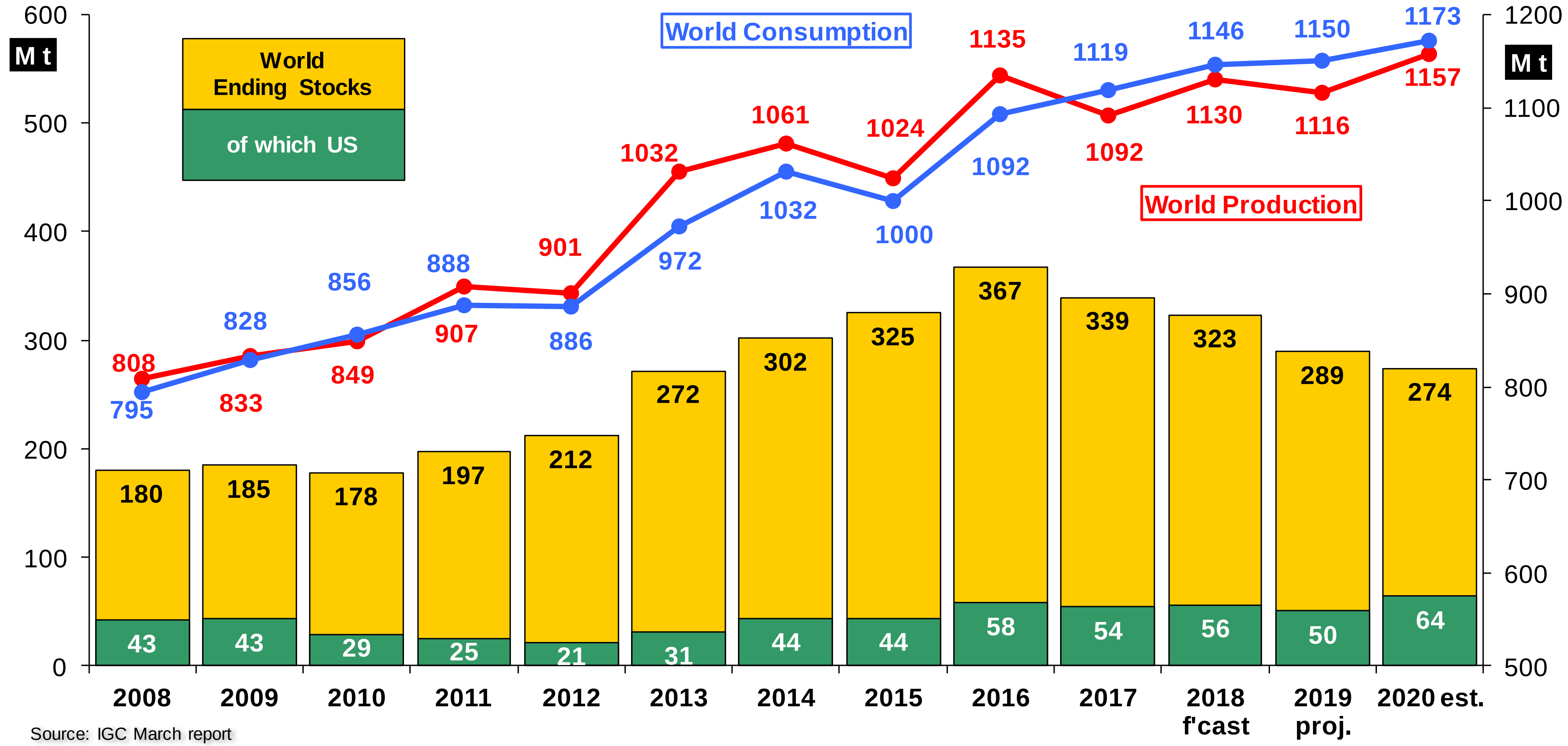
Source: IGC March report

Summary of the IGC Grain Market Report
(GMR 508 of 26/03/2020)
Outlook for 2020/21

Wheat production in selected countries (all wheat; million tonnes)

	2017/18	2018/19 *(estimate)*	2019/20 *(forecast)*	2020/21 *(projection)*	y/y change
EU-27 **(2020/21)** ***EU-27 + UK to 2019/20***	151.4	137.7	156.0	**132.2**	-5.4% change on EU27 basis
USA	47.4	51.3	52.3	**50.6**	-3.1%
Canada	30.4	32.2	32.3	**34.0**	+5.1%
Russia	85.1	71.7	73.6	**80.0**	+8.7%
Ukraine	27.0	25.1	29.0	**27.0**	-6.9%
Australia	20.9	17.3	15.2	**24.0**	+58.6%
China	134.3	131.4	133.6	**134.0**	+0.3%
India	98.5	99.7	103.6	**108.0**	+4.2%
World	**761.8**	**732.2**	**763.2**	**768.5**	**+0.7%**

World maize: IGC



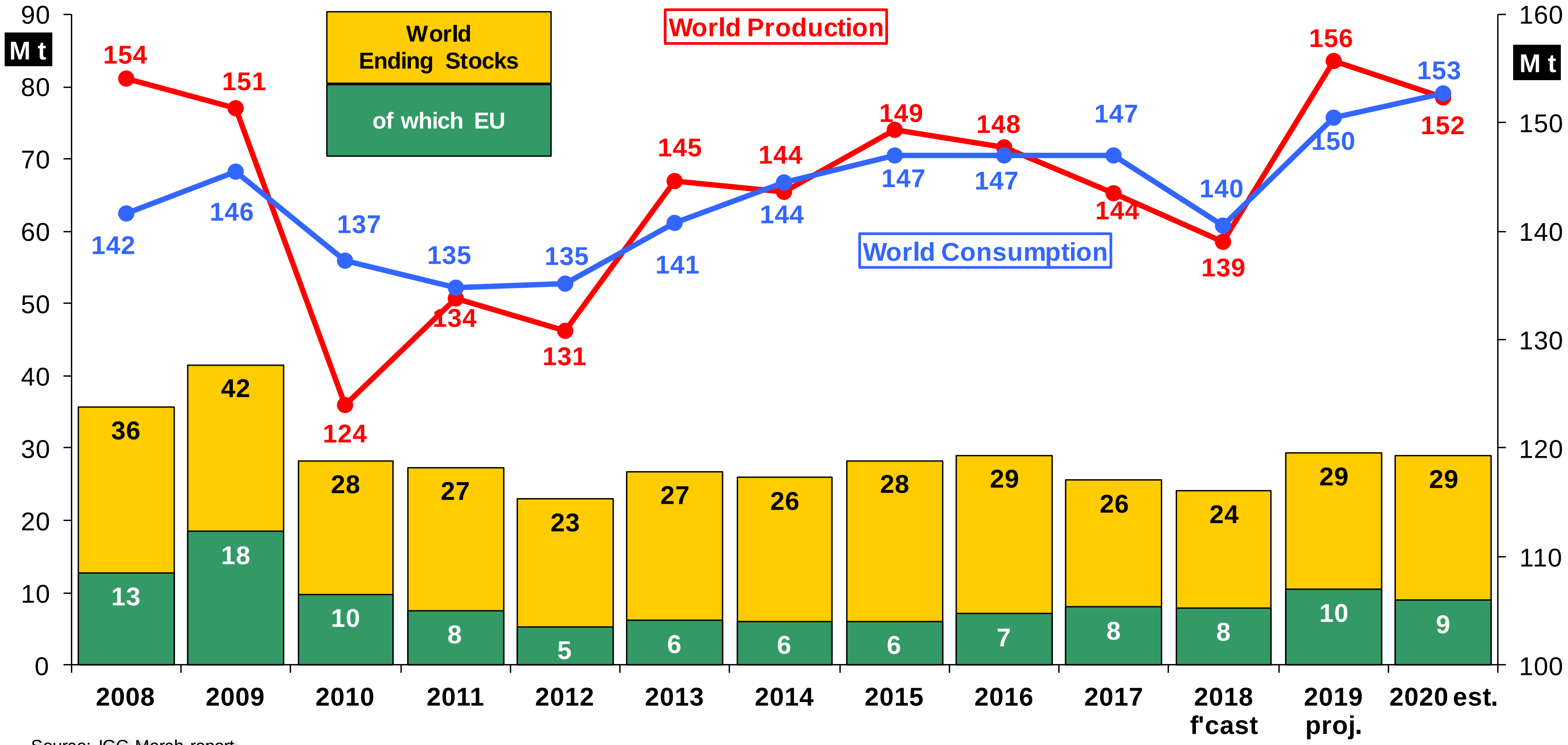
Source: IGC March report

Summary of the IGC Grain Market Report
(GMR 508 of 26/03/2020)
Outlook for 2020/21

Maize production in selected countries (million tonnes)

	2017/18	2018/19 *(estimate)*	2019/20 *(forecast)*	2020/21 *(forecast)*	y/y change
EU-27 **(2020/21)** ***EU-27 + UK to 2019/20***	64.8	67.0	68.0	**68.2**	+0.3 % on EU-27 basis
USA	371.1	364.3	347.8	**388.8**	+11.8 %
Ukraine	24.1	35.8	35.8	**34.5**	-3.6 %
Russia	13.2	11.4	14.3	**13.3**	-6.7%
Brazil	80.8	100.0	101.0	**104.0**	+2.9 %
Argentina	43.5	57.0	54.1	**52.1**	-3.7 %
China	259.1	257.3	260.8	**256.9**	-1.5 %
World	**1,091.6**	**1,129.8**	**1,116.3**	**1,157.3**	**+3.7 %**

World barley: IGC



Source: IGC March report

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Summary of the IGC Grain Market Report
(GMR 508 of 26/03/2020)
Outlook for 2020/21

Barley production in selected countries (million tonnes)

	2017/18	2018/19 *(estimate)*	2019/20 *(forecast)*	2020/21 *(projection)*	y/y change
EU-27 **(2020/21)** ***EU-27 + UK to 2019/20***	58.6	56.3	63.3	**53.6**	-2.8% on EU-27 basis
Russia	20.2	16.7	19.9	**19.8**	-0.7%
Ukraine	8.7	7.6	9.5	**8.6**	-9.5%
Australia	9.3	8.3	8.9	**9.2**	+3.9%
Canada	7.9	8.4	10.4	**9.7**	-6.6%
Turkey	7.1	7.0	7.6	**7.7**	+1.4%
World	**143.5**	**139.0**	**155.7**	**152.4**	**-2.1%**

USDA 2020 Prospective Plantings Report

(31-03-2020) Summary

	2018	2019	2020	2020 vs 19
Maize	35.96	36.30	**39.25**	+8.1%
Soybeans	36.08	30.80	**33.80**	+9.7%
ALL WHEAT	19.35	18.27	**18.07**	-1.1%
Winter wheat	*13.17*	*12.61*	***12.45***	*-1.2%*
Spring wheat	*5.34*	*5.12*	***5.09***	*-0.6%*
Durum wheat	*0.84*	*0.54*	***0.52***	*-3.7%*
Sorghum	2.30	2.13	**2.36**	+10.5%
Barley	1.03	1.10	**1.18**	+7.4%
Oats	1.11	1.14	**1.22**	+7.2%

Data in million hectares

USDA 2020 Prospective Plantings Report

(31-03-2020) Summary

- This report is based on a survey covering around 80,000 farm operators and was conducted during the first two weeks of March 2020, i.e. just before the fall of oil prices and the start of major worries about decreasing maize demand for ethanol production.

- Intended **maize** area would be the highest since 2012 in case realized. The reported figure was well above trade expectations, while **soya beans** area fell below trade estimates.

- **All wheat** area is estimated at a record low level with both winter and spring wheat area seen lower y/y.

- **Winter wheat** area includes 8.78 million hectares Hard Red Winter and 2.30m ha Soft Red Winter wheat, while 95% of the spring wheat is Hard Red Spring wheat (4.82m ha). Durum wheat to continue its downward trend.

- **Sorghum** area to increase by over 10% reflecting recovery of exports.

Export restrictions in the Black Sea region

- **RUS:** according to a proposal from the AgMin. Russia will introduce a quota on grain exports for Q4 of MY 2019/2020. During 1 April – 30 June 2020 total grain exports would be limited to 7 million tonnes and the measure covers wheat, meslin, rye, barley and maize. The export limitation will not apply to the Eurasian Economic Union. This volume is not expected to cause any major disruption at this stage.

- **Ukrainian** state-owned companies to release about 160,000 of their wheat reserve stocks on the domestic market in an attempt to improve supply and stabilize prices following heavy stock-piling by individuals, as well as respond to the request of the Ukrainian Milling Association to limit wheat exports *(AgCensus).*

- **UKR** *(IGC)*: traders agreed to a govermental proposal to limit 2019/20 wheat exports to 20.2 million tonnes. Accordingly, about 2.2 million could be exported during Apr-Jun.

- **KZH** *(IGC):* recent ban on wheat flour exports to be replaced by export quotas for wheat and flour.

European Commission

EU Market situation

- Cereals
- Oilseeds
- Proteins

- Cereals

EU + UK : Area Forecasts

EVOLUTION OF THE EU 27 + UK CEREALS AREA					
Million ha	2017	2018	2019 Fev fcst	2019 March fcst	% change 2018/2019
TOTAL	**55,2**	**55,0**	**56,3**	**56,3**	2,3
Soft wheat	23,4	23,0	23,8	23,8	3,3
Durum wheat	2,5	2,5	2,2	2,2	-11,8
Barley	12,0	12,3	12,3	12,3	0,0
Maize	8,3	8,3	8,9	8,9	7,5
Rye	2,0	1,9	2,2	2,2	14,2
Oats	2,7	2,7	2,6	2,6	-6,9

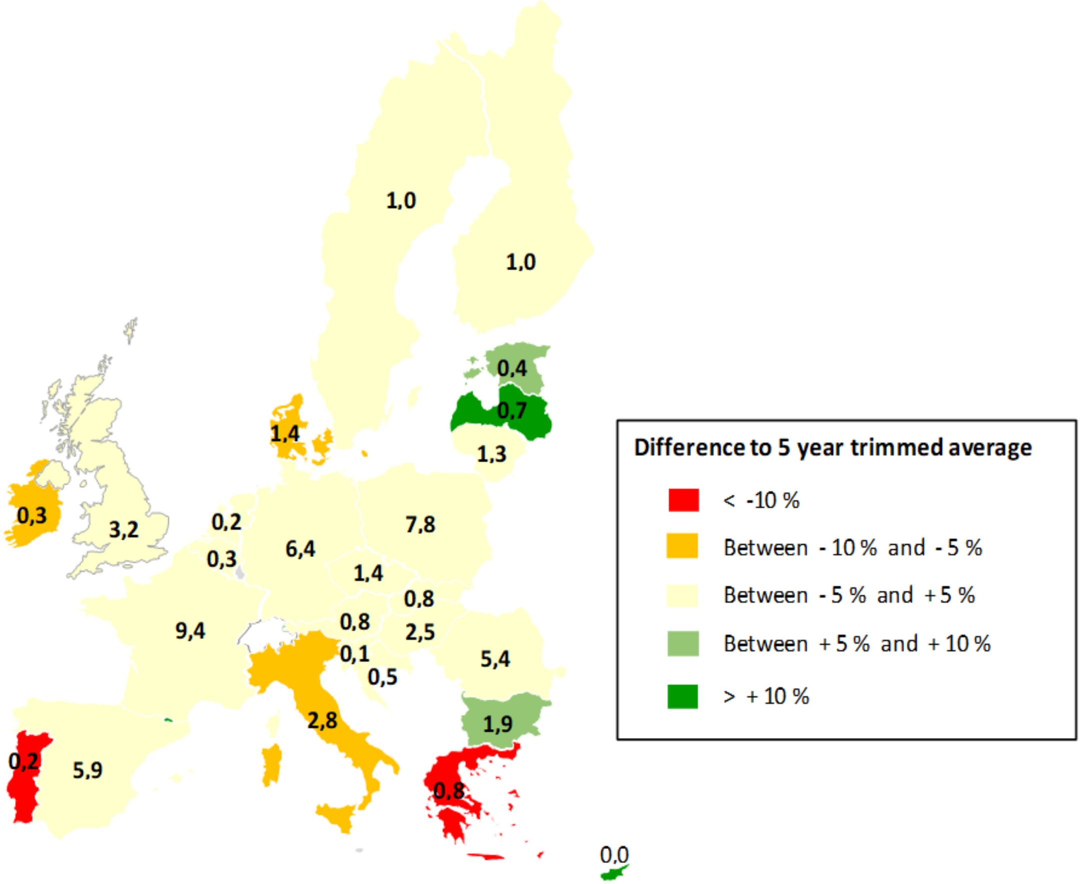
Sources : DG AGRI - G4

EU + UK : Production Forecasts

EVOLUTION OF THE EU 27 + UK CEREALS USABLE PRODUCTION					
Million tonnes	2017/2018	2018/2019	2019/2020 Fev fcst	2019/2020 March fcst	% change 2018/2019
TOTAL	**305,3**	**290,0**	**319,9**	**319,5**	10,2
Soft wheat	142,0	128,3	147,2	147,0	14,6
Durum wheat	8,7	8,7	7,7	7,5	-13,8
Barley	58,3	56,0	63,1	63,1	12,7
Maize	64,8	69,1	70,0	70,0	1,3
Rye	7,2	6,1	8,3	8,3	36,1
Oats	8,1	7,7	7,9	7,9	2,6

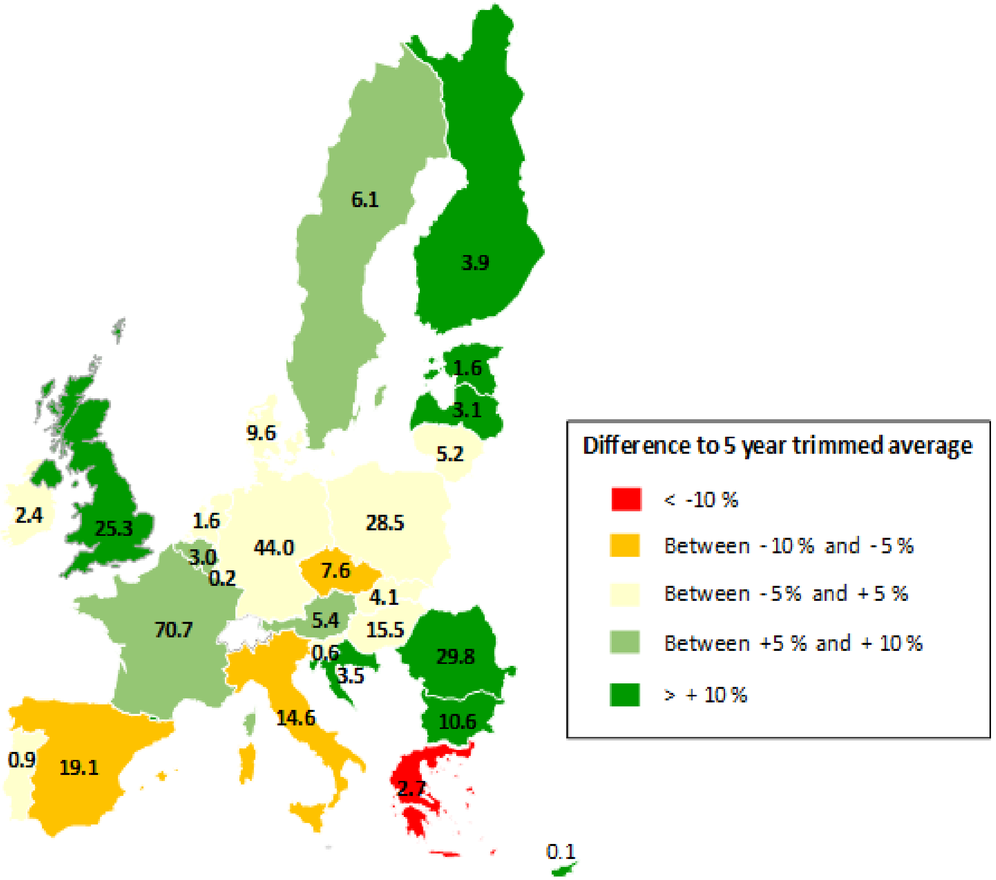
Sources : DG AGRI -G4

Total cereals area 2019 forecast (million hectares)



EU + UK area: 56,3 million hectares - difference to 5 year trimmed average: -0,2%

Total cereals production 2019 forecast (million tonnes)



EU + UK production: 319.5 million tonnes - difference to 5 year trimmed average: +4.9%

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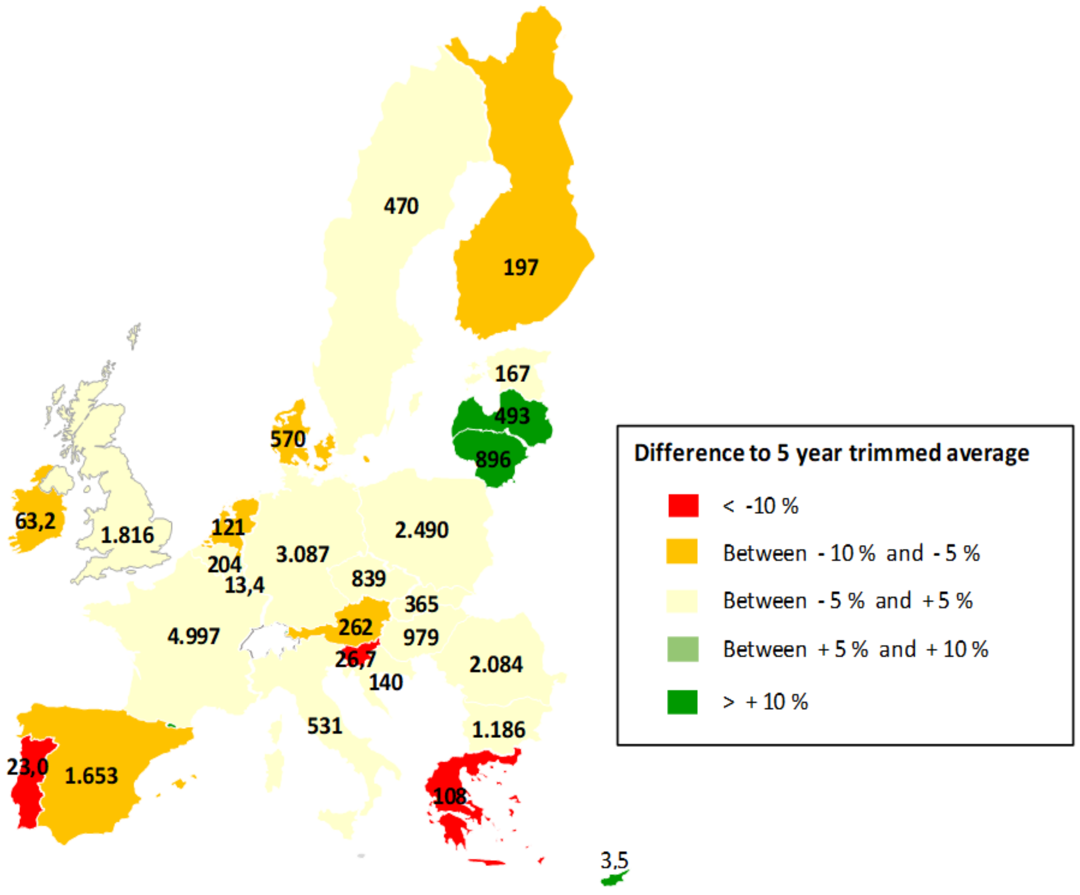
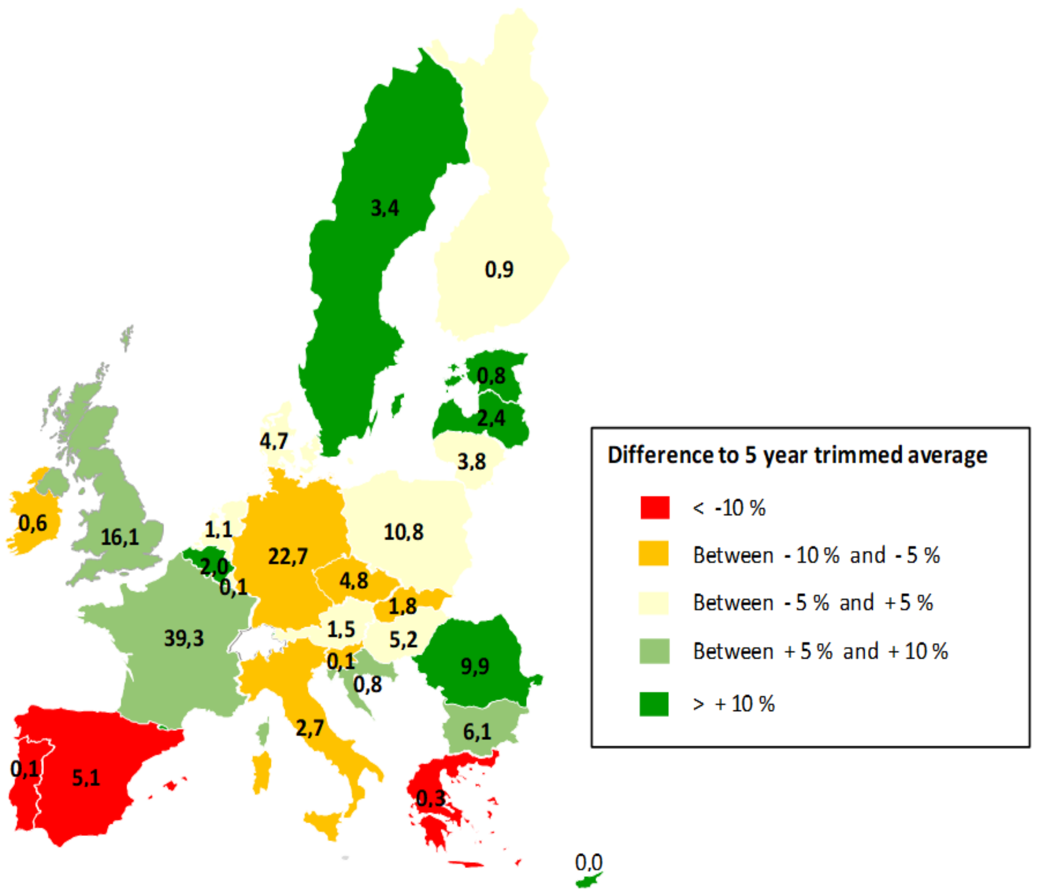
Soft wheat area 2019 forecast (thousand hectares)



EU + UK area: 23 782 thousand hectares - difference to 5 year trimmed average: -0,9%

Soft wheat production 2019 forecast (million tonnes)



EU + UK production: 147 million tonnes - difference to 5 year trimmed average: +3,9%

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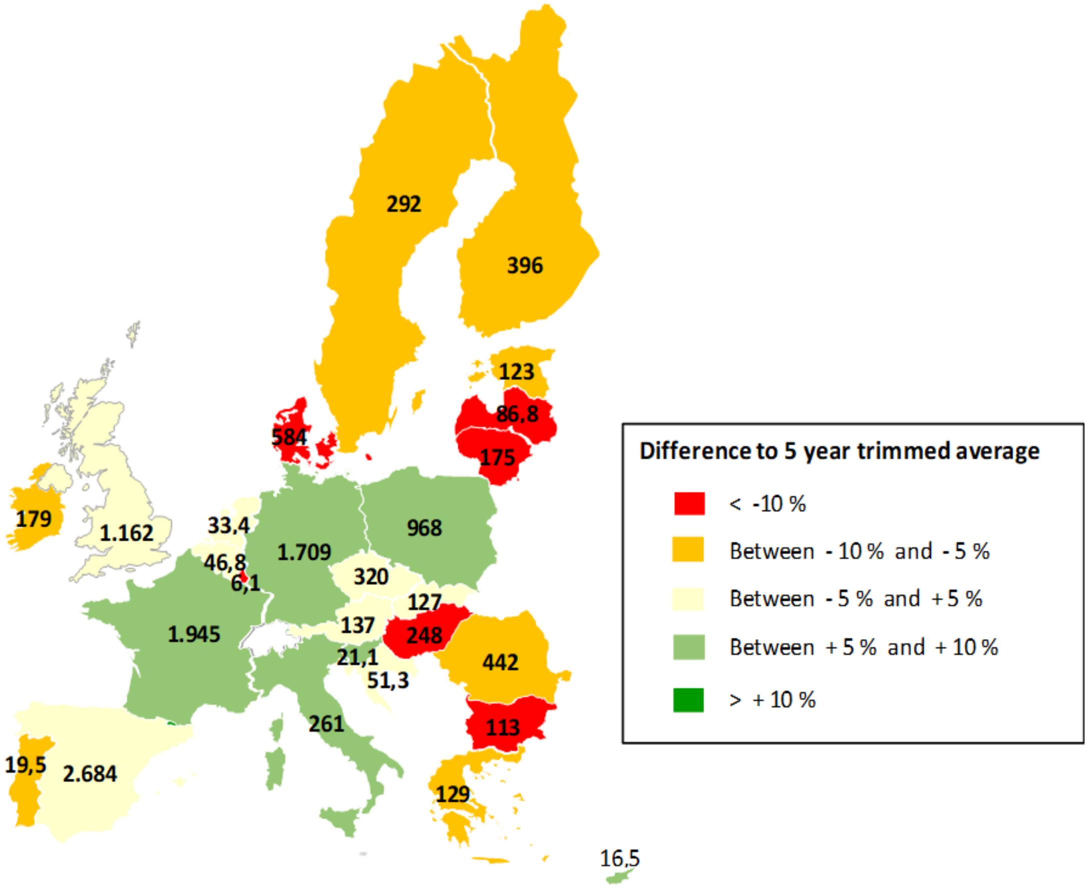
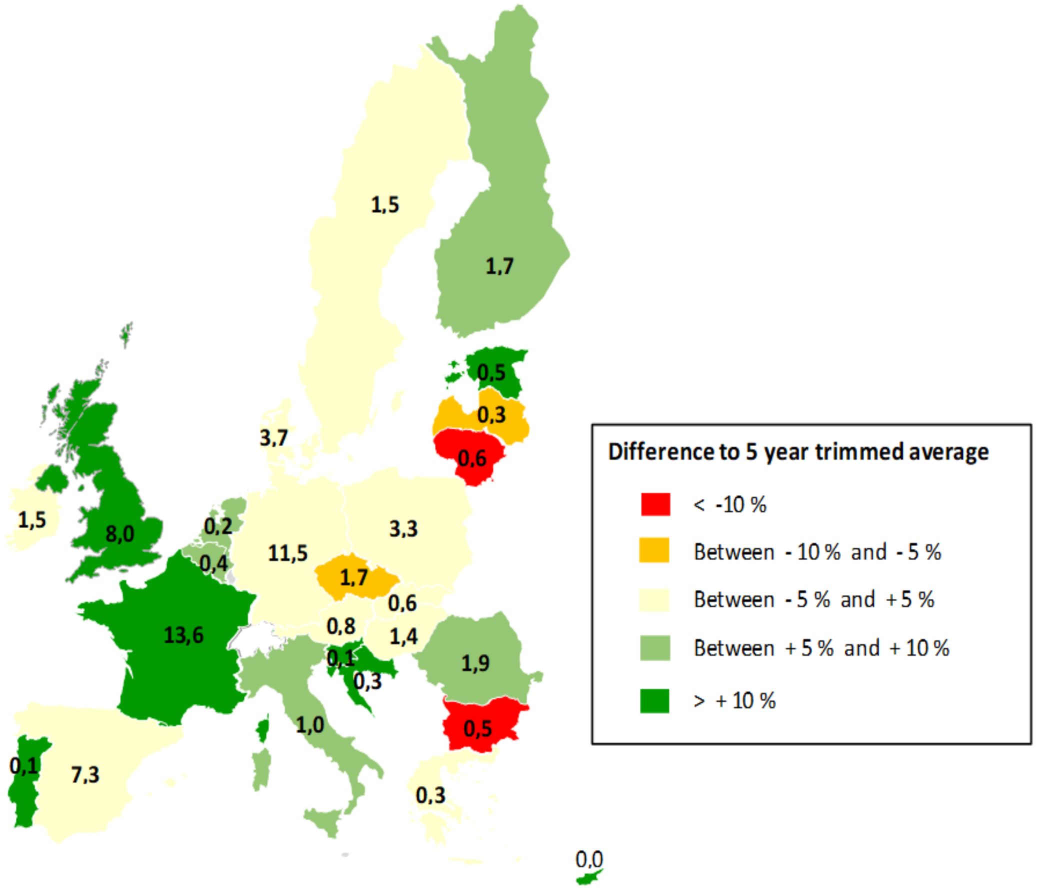
Barley area 2019 forecast (thousand hectares)



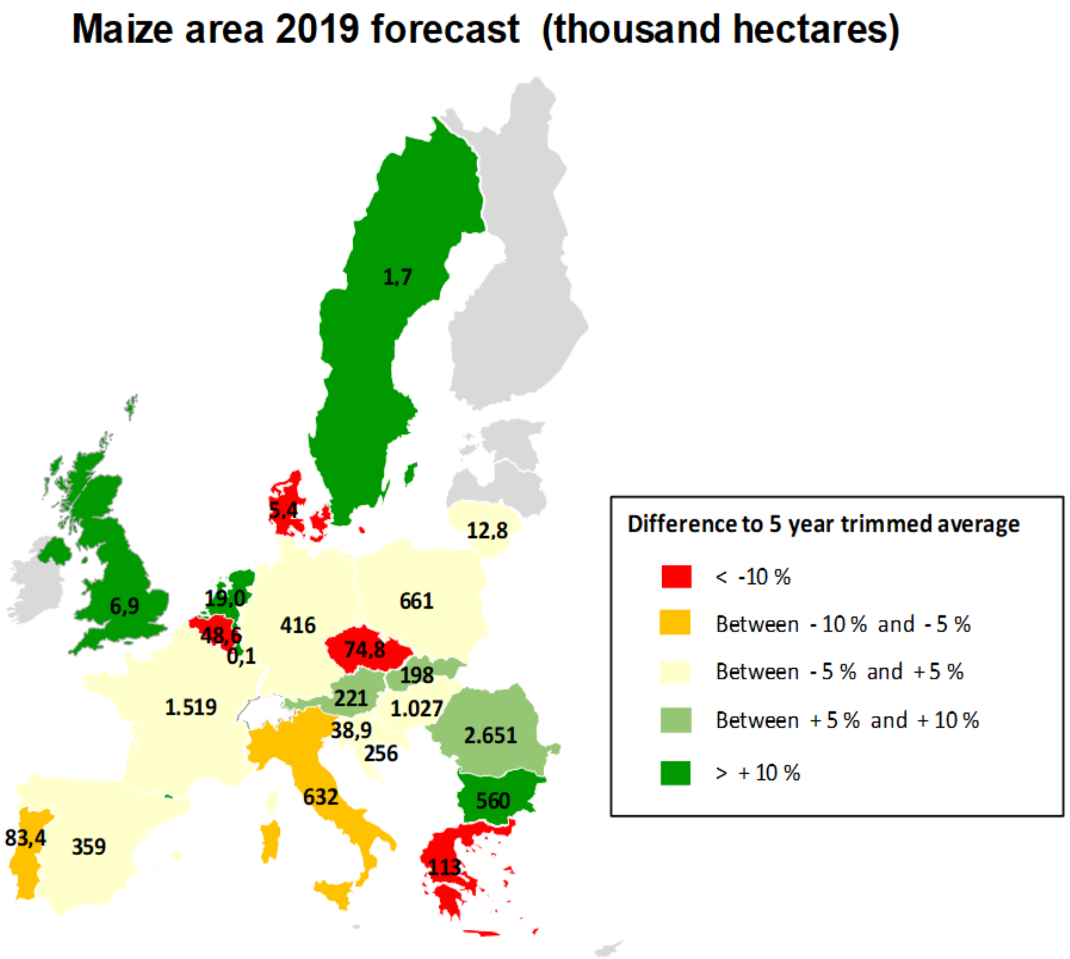
EU + UK area: 12 274 thousand hectares - difference to 5 year trimmed average: +0,1%

Barley production 2019 forecast (million tonnes)

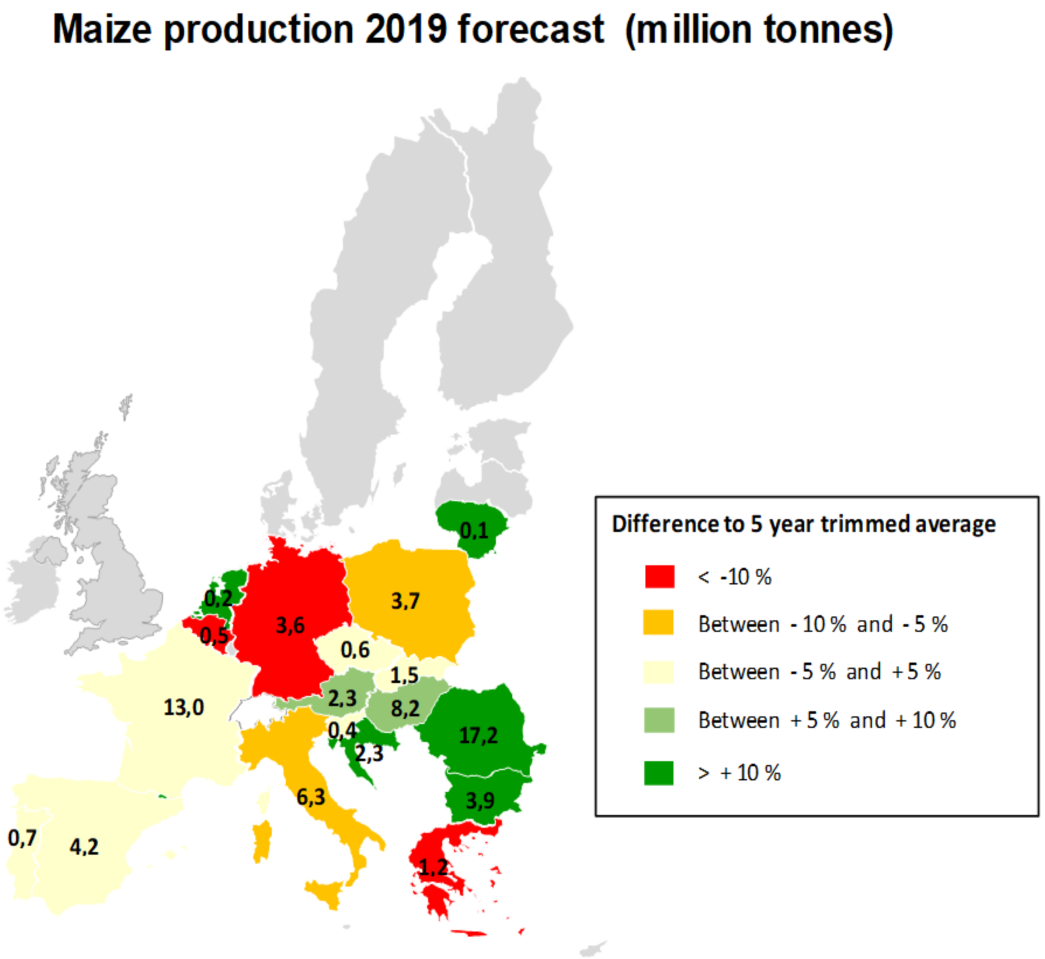


EU + UK production: 63,1 million tonnes - difference to 5 year trimmed average: +6,4%

European Commission



EU + UK area: 8 904 thousand hectares - difference to 5 year trimmed average: +2,3%



EU + UK production: 70 million tonnes - difference to 5 year trimmed average: +6.8%

EU + UK Usable Production

2019/2020 Marketing Year

Million tonnes	**EC DG AGRI 26-mars**	Stratégie Grain 12-mars	ADM 31-mars	COCERAL 16-mars
Total	**319,5**	310,7	310,2	307,9
Soft Wheat	**147,0**	146,4	146,3	145,7
Durum Wheat	**7,5**	7,5	7,7	7,5
Barley	**63,1**	62,2	61,9	62,2
Maize	**70,0**	63,8	63,7	61,0
Rye	**8,3**	7,8	8,5	8,2

Production Forecast : Year/Year Variation

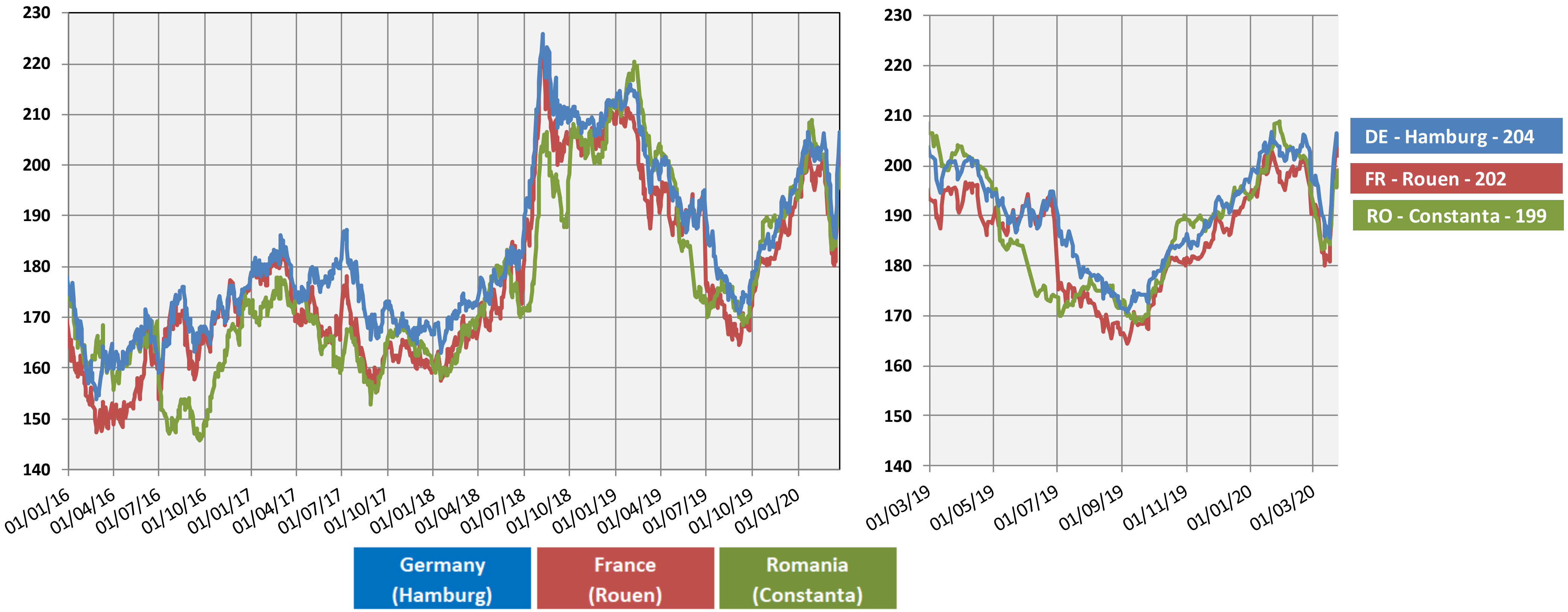
Most important producers
(80% of EU production)

FR	13,8%
DE	16,8%
PL	7,4%
IT	-0,3%
ES	-18,5%
HU	4,7%
RO	-4,8%

UK	21,3%

Sources : DG AGRI - G4

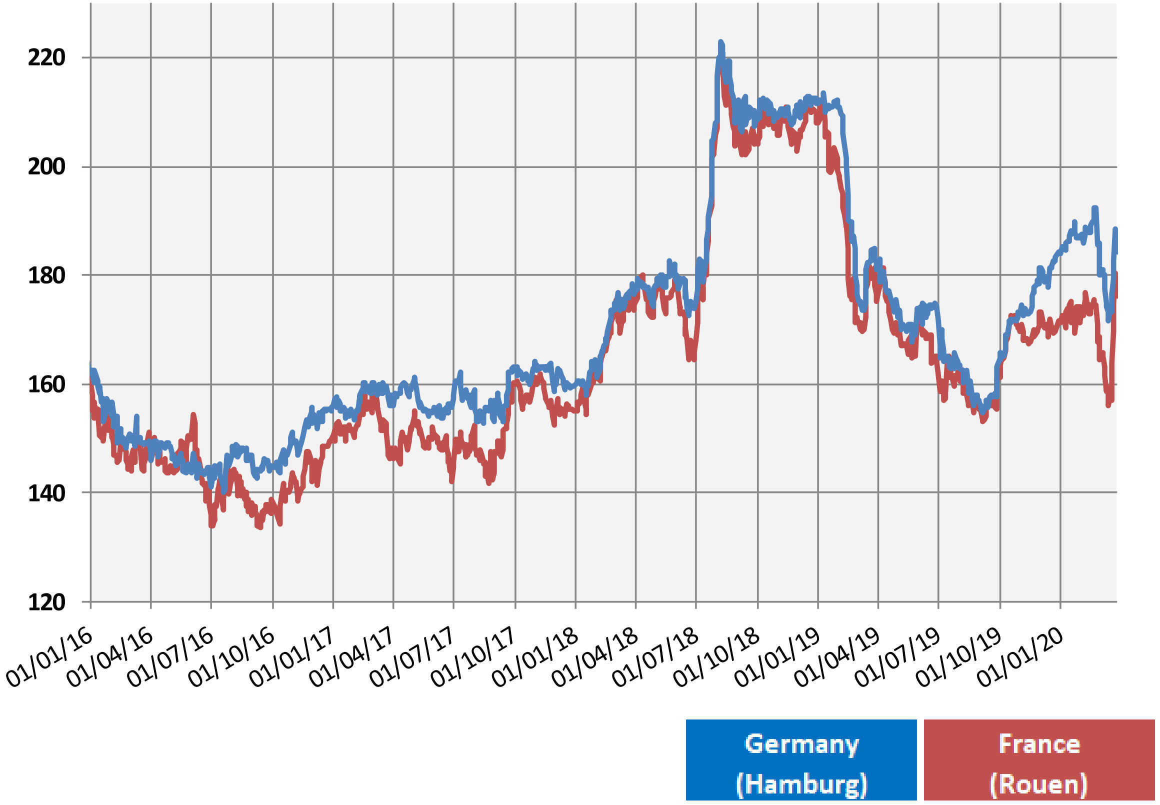
EU market prices for milling wheat – (EUR/tonne)

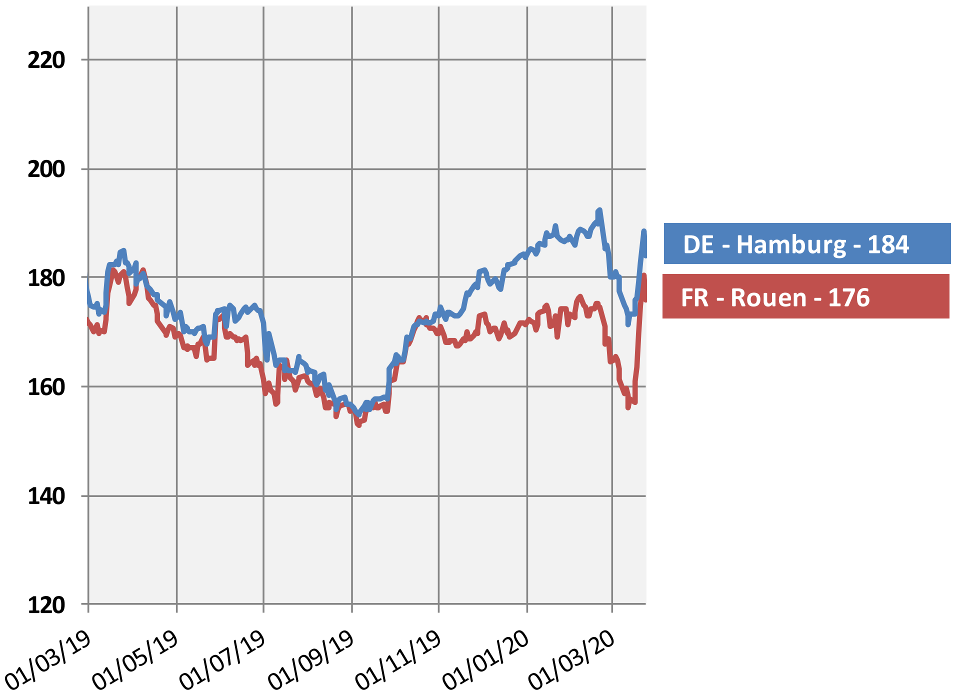


Source: International Grains Council

European Commission

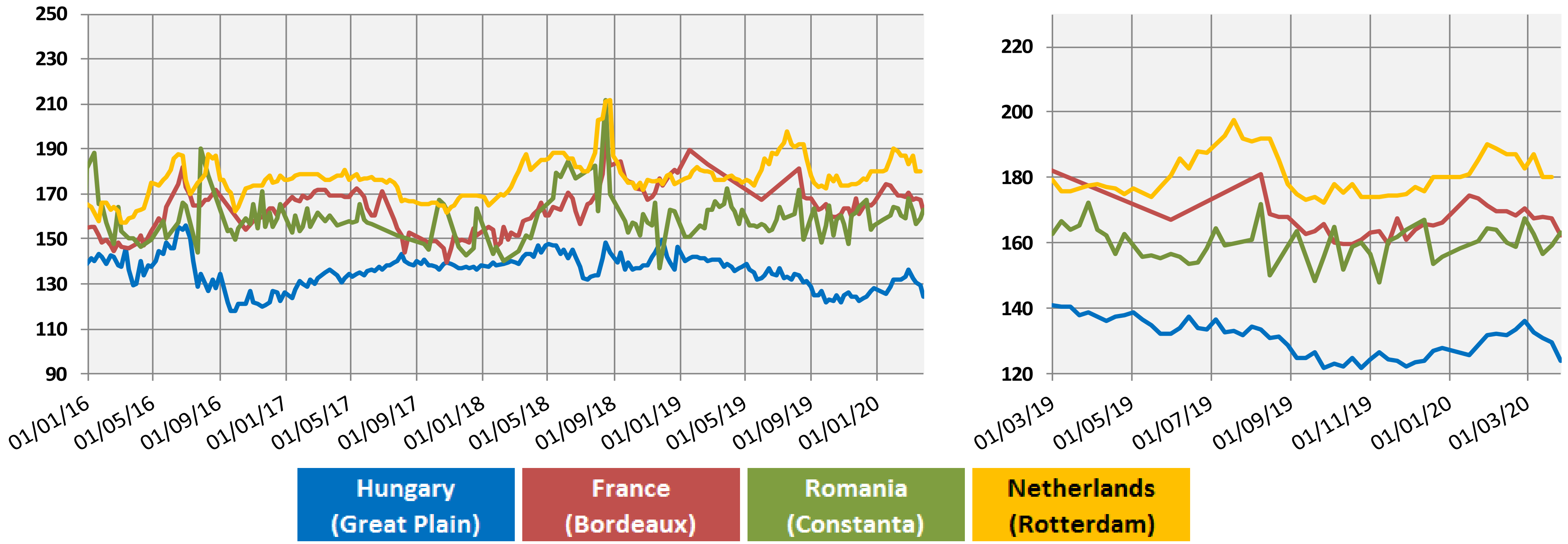
EU market prices for feed barley – (EUR/tonne)





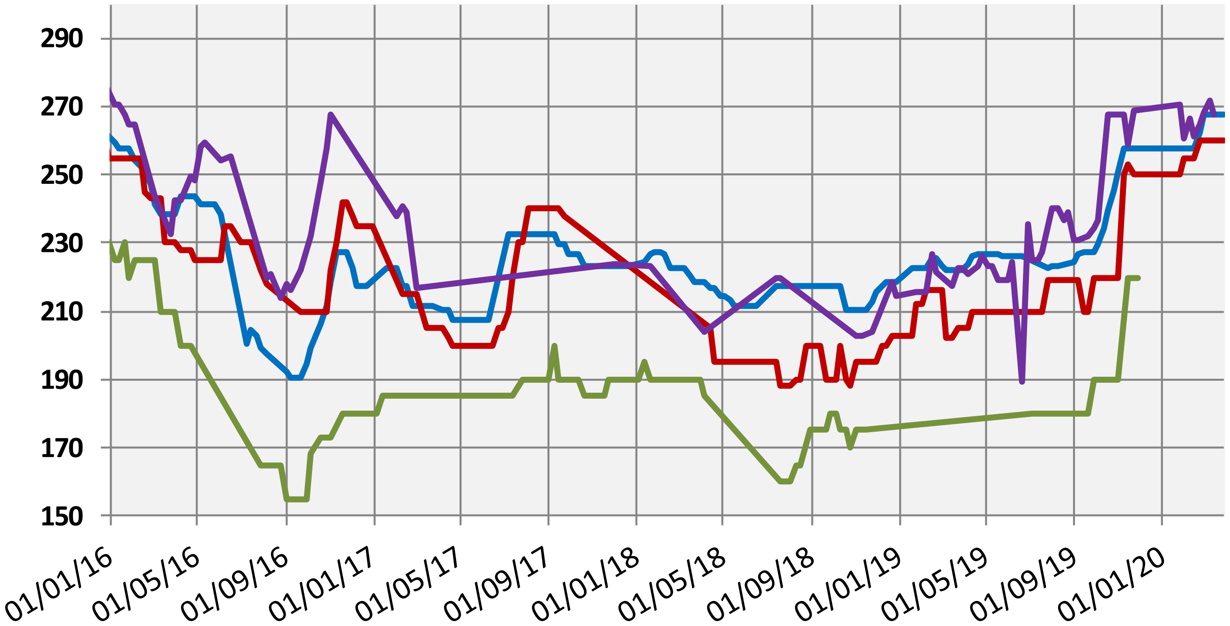
Source: International Grains Council

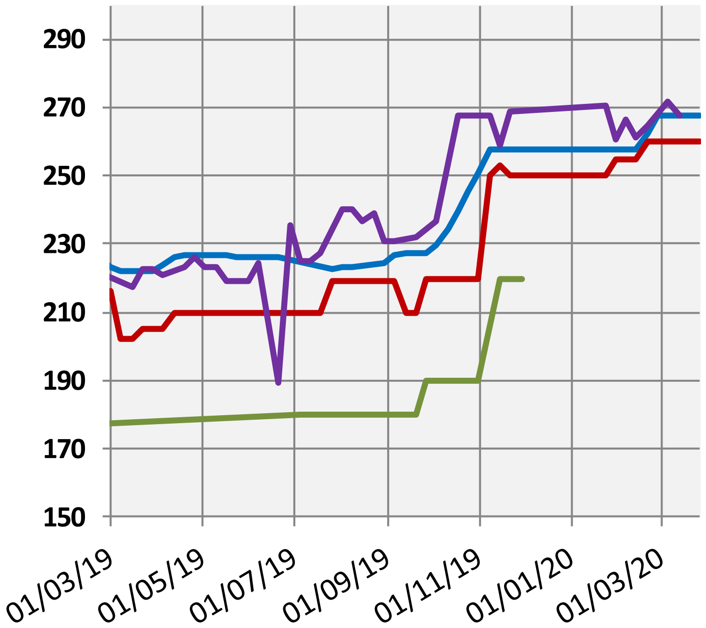
EU market prices for maize – (EUR/tonne)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

EU market prices for durum wheat – (EUR/tonne)





Italy (Bologna)	Spain (Sevilla)	Greece (Serres)	France (La Pallice)

Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

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EU Market prices

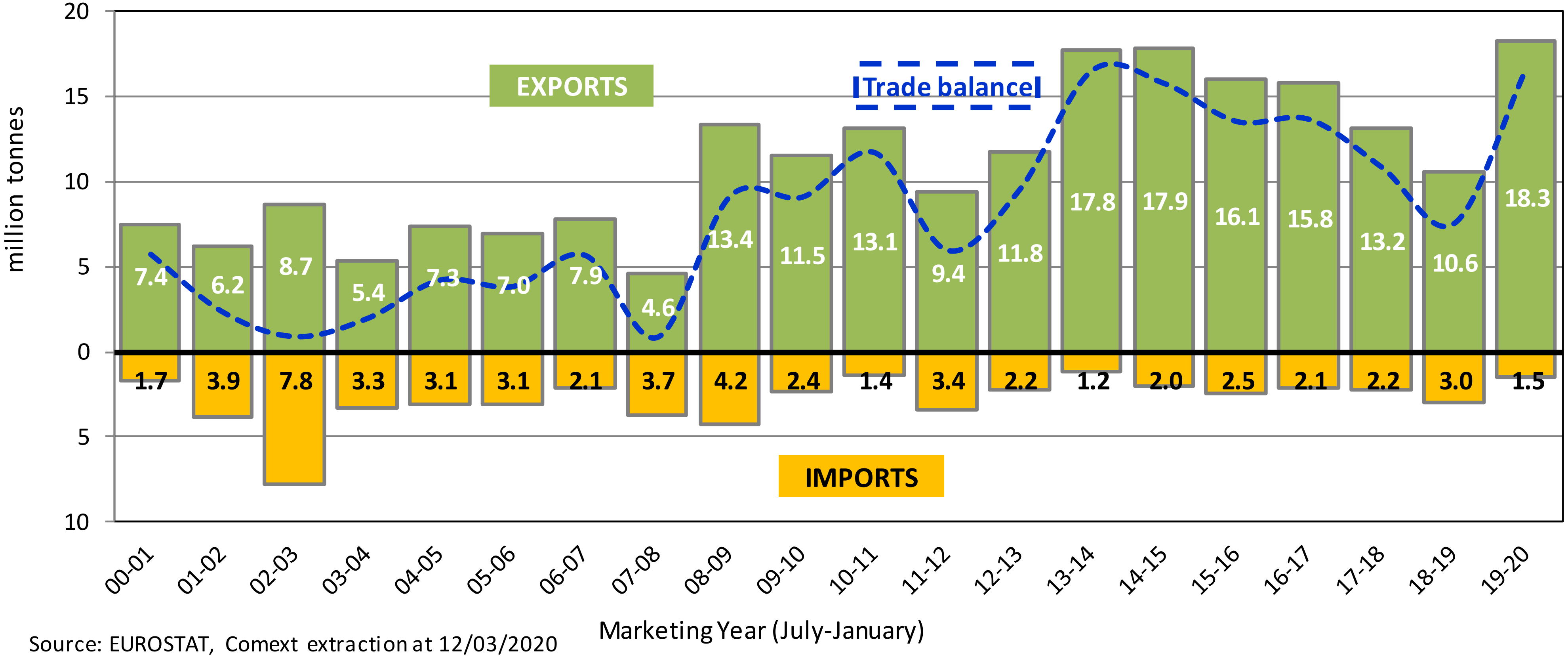
- Milling wheat: Fob Rouen and Hamburg well above 200 EUR/tonne - recent price increase on high demand (+4% m/m; +4% y/y)

- Feed barley : Delivered Rouen around 175 EUR/tonne - recent price increase also resulting from high demand (+ 5% m/m and – 6% y/y)

- Maize: around 160 EUR/tonne Fob Bordeaux (- 5% m/m and – 10 % y/y)

- Durum wheat: around 260 EUR/tonne delivered La Pallice (stability m/m and + 25 % y/y)

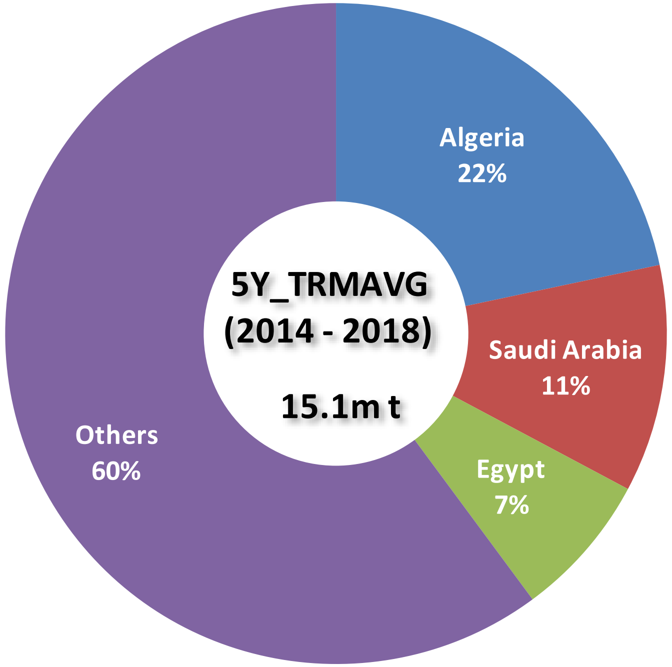
EU+UK – Common wheat exports and imports (July - January) including flour and groats in grain equivalent



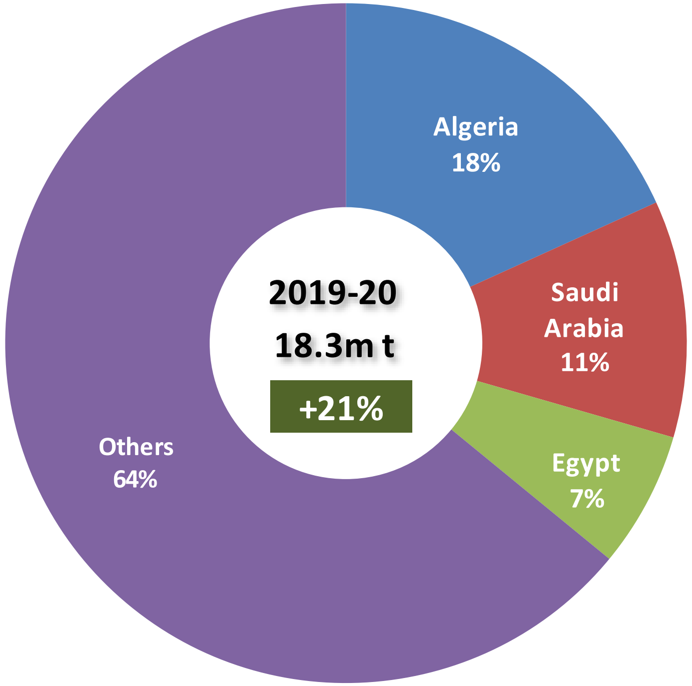
Source: EUROSTAT, Comext extraction at 12/03/2020

EU+UK common wheat export destinations

(July - January)



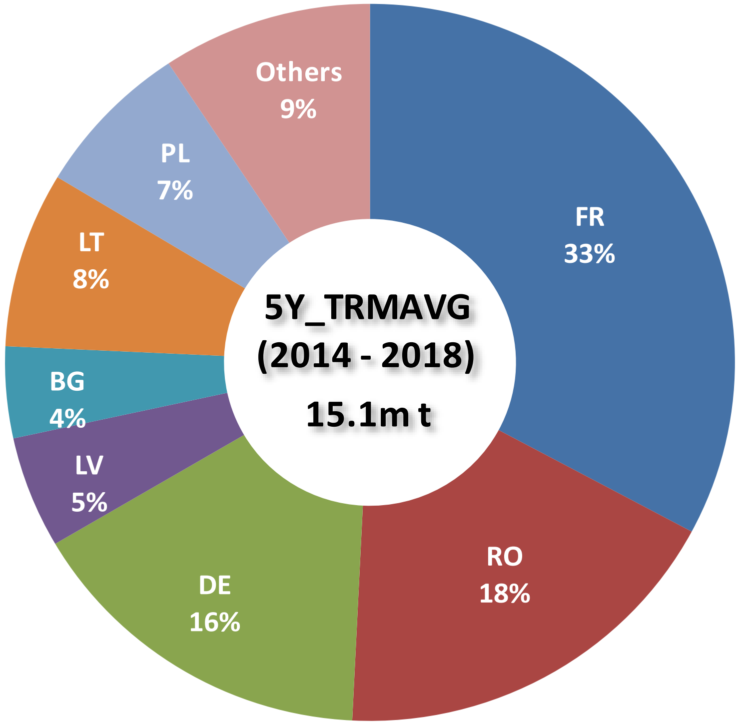
(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20	
Algeria	3 268	3 335	2%
Saudi Arabia	1 679	2 065	23%
Egypt	1 068	1 185	11%
Others	9 068	11 734	29%



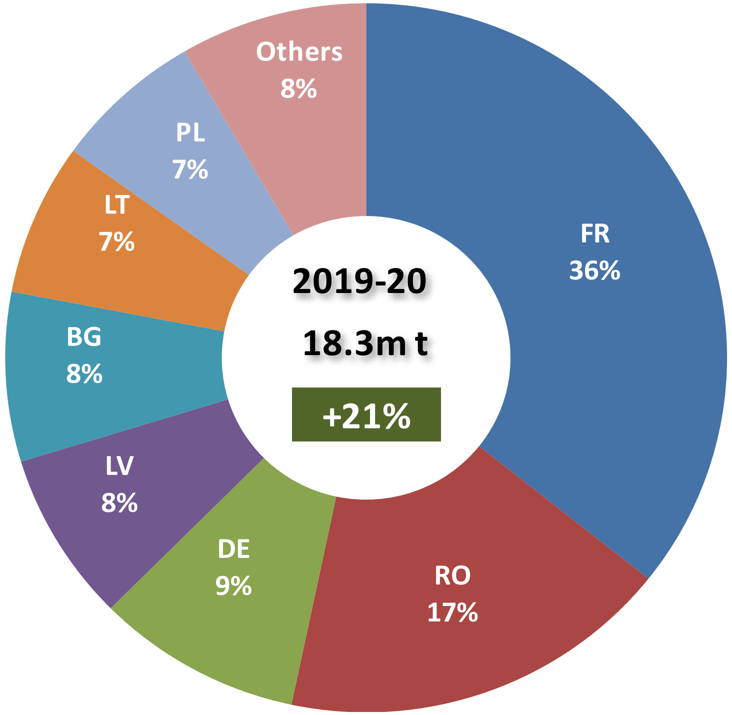
Source: Eurostat- Comext @ 31 Mar 2020

EU+UK exporting common wheat

(July - January)

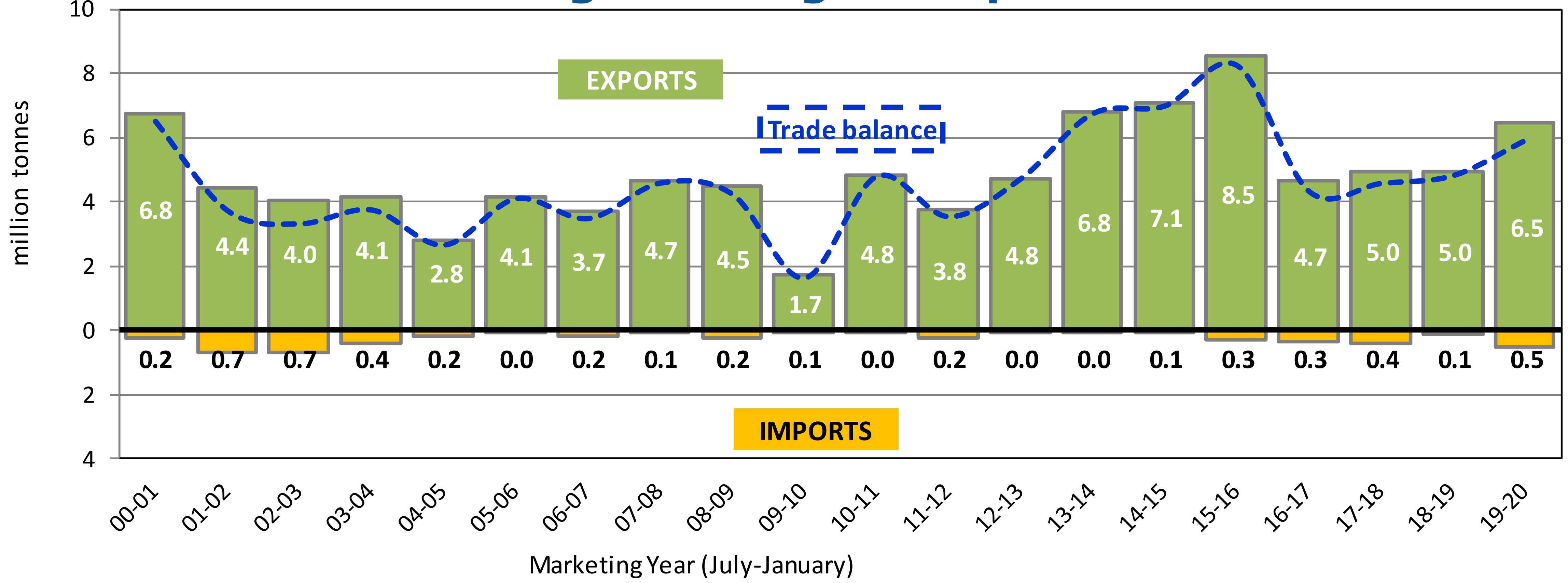


(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20	
FR	4 951	6 541	32%
RO	2 707	3 227	19%
DE	2 380	1 685	-29%
LV	761	1 421	87%
BG	622	1 415	128%
LT	1 194	1 270	6%
PL	1 064	1 224	15%
Others	1 404	1 538	10%



Source: Eurostat- Comext @ 31 Mar 2020

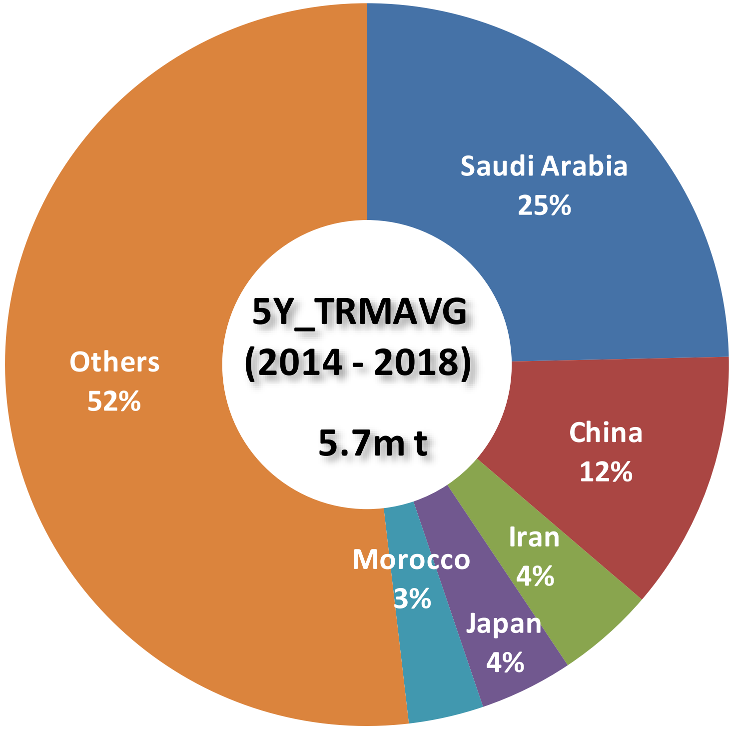
EU+UK – Barley exports and imports (July - January) including malt in grain equivalent



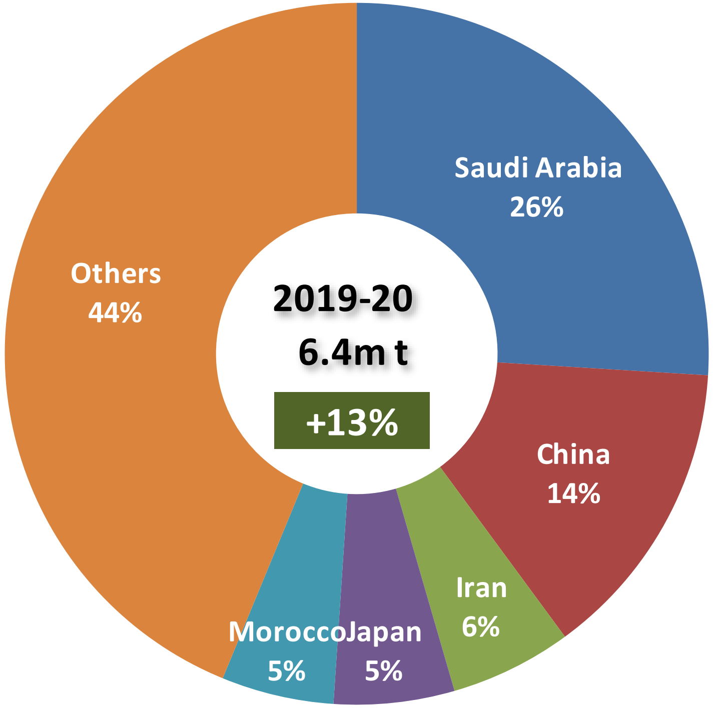
Source: EUROSTAT, Comext extraction at 12/03/2020

EU+UK barley export destinations

(July - January)

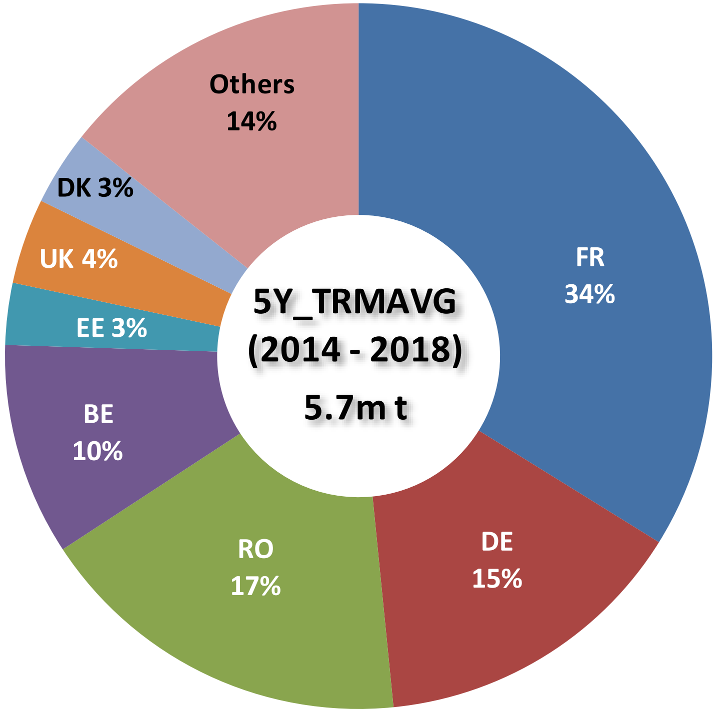


(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20		
Saudi Arabia	1 405	1 668	↑	*19%*
China	662	896	↑	*35%*
Iran	249	360	↑	*44%*
Japan	237	356	↑	*50%*
Morocco	191	332	↑	*74%*
Others	2 953	2 812	↓	*-5%*

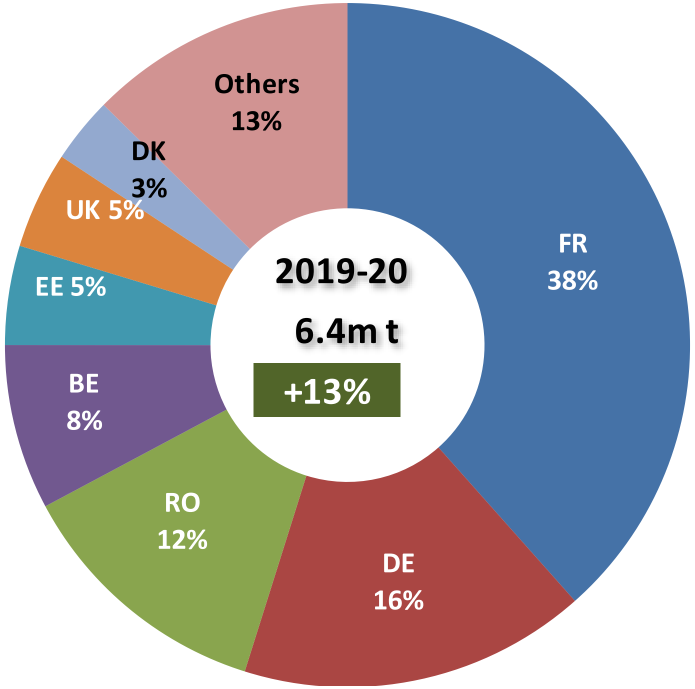


Source: Eurostat- Comext @ 31 Mar 2020

EU+UK exporting barley
(July - January)

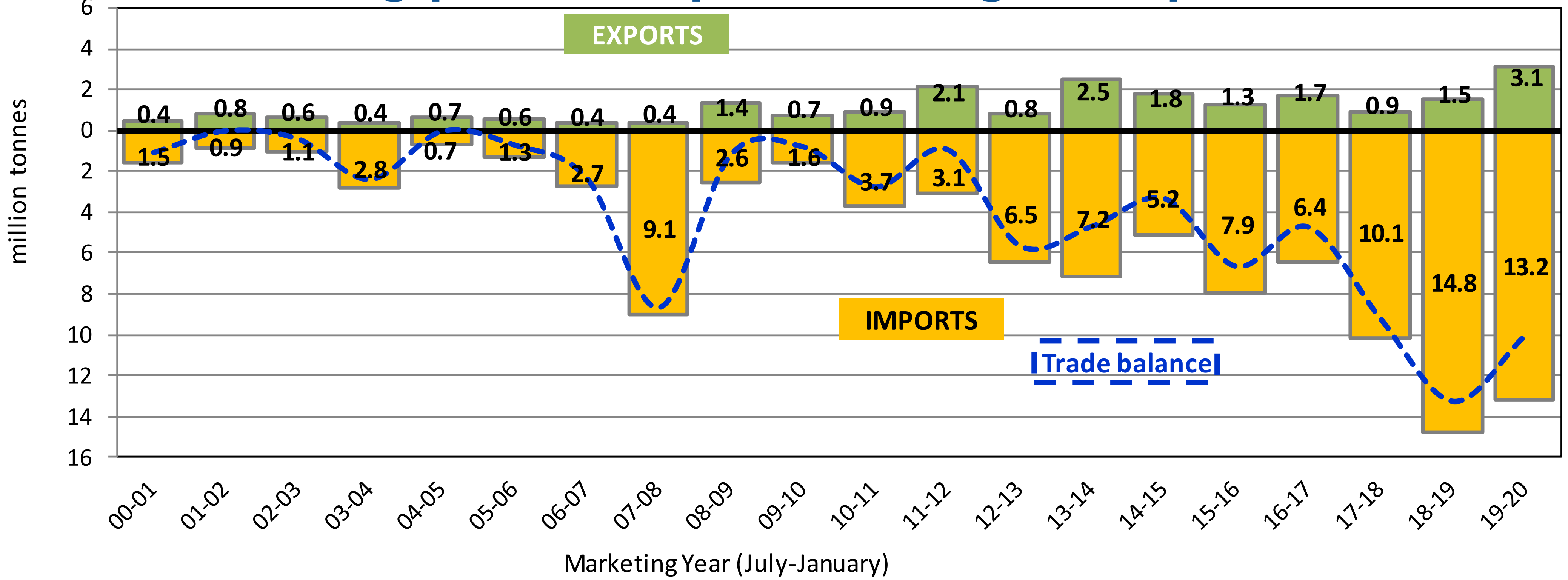


(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20	
FR	1 928	2 469	*28%*
DE	831	1 054	*27%*
RO	988	793	*-20%*
BE	554	502	*-9%*
EE	161	301	*87%*
UK	223	295	*32%*
DK	194	200	*3%*
Others	817	810	*-1%*



Source: Eurostat- Comext @ 31 Mar 2020

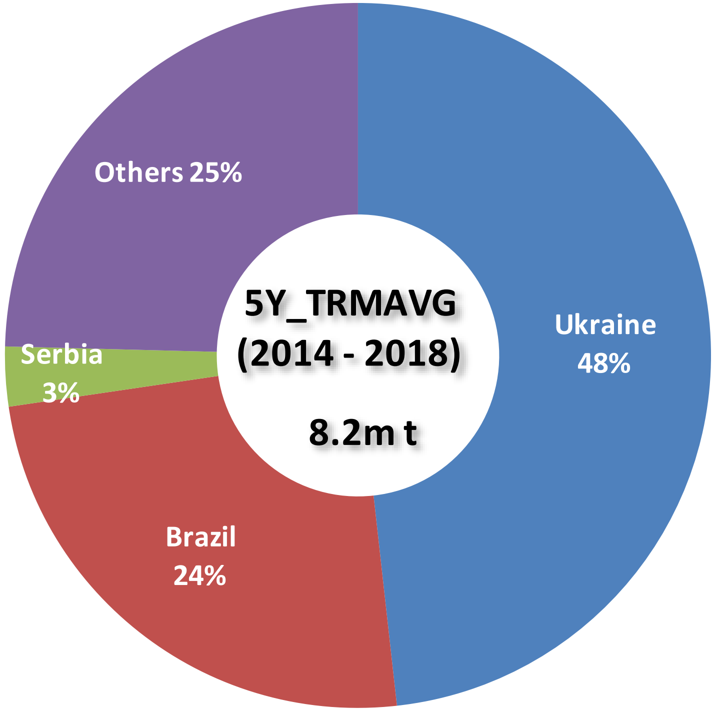
EU+UK – Maize exports and imports (July - January) including processed products in grain equivalent



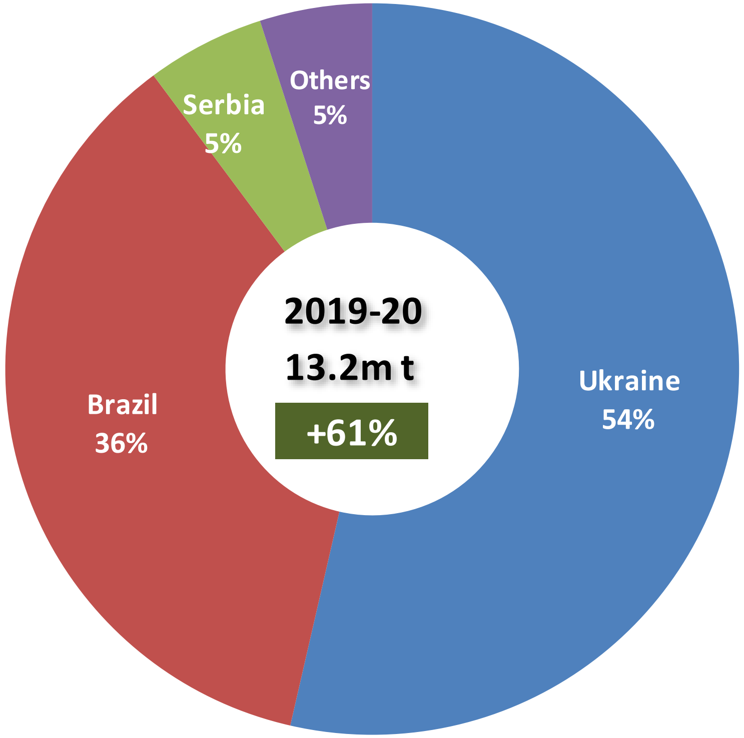
Source: EUROSTAT, Comext extraction at 12/03/2020

EU+UK maize import origins

(July - January)



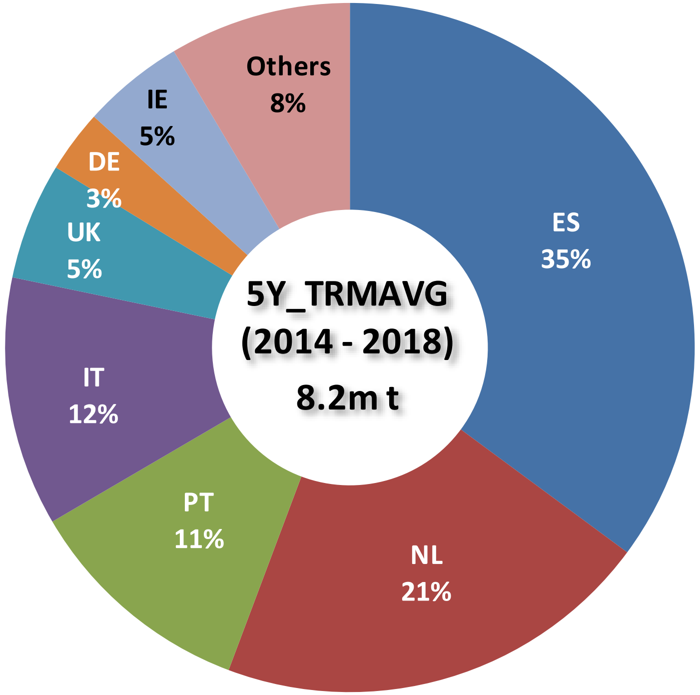
(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20	
Ukraine	3 943	7 074	*79%*
Brazil	1 997	4 785	*140%*
Serbia	223	689	*208%*
Others	2 010	653	*-68%*



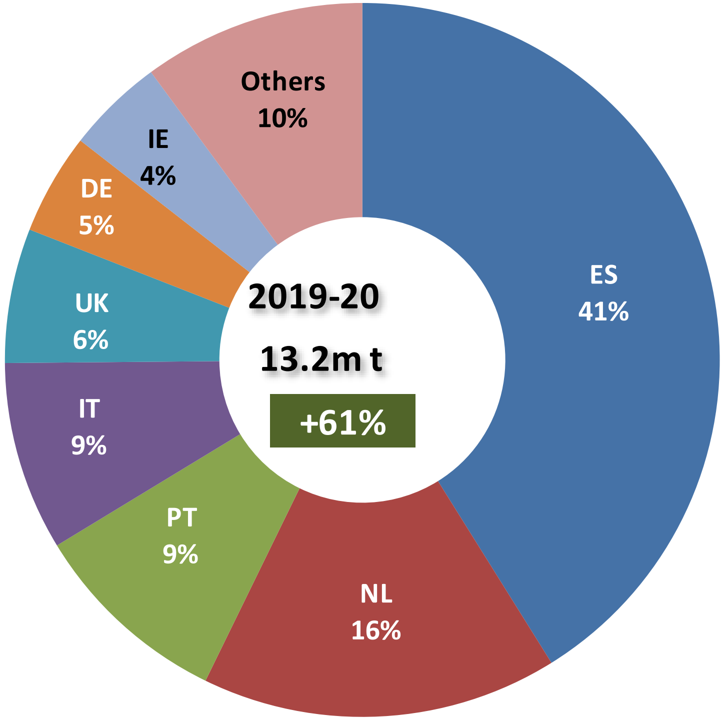
Source: Eurostat- Comext @ 31 Mar 2020

European Commission

EU+UK importing maize
(July - January)



(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20	
ES	2 872	5 429	*89%*
NL	1 683	2 126	*26%*
PT	887	1 198	*35%*
IT	956	1 130	*18%*
UK	448	804	*79%*
DE	240	605	*152%*
IE	391	580	*48%*
Others	697	1 329	*91%*



Source: Eurostat- Comext @ 31 Mar 2020

European Commission

EU + UK Cereals Balance Sheet

Thousand metric tonnes

LAST UPDATED: 26/03/2020	2019/20 (forecast)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**11.670**	**5.247**	**2.303**	**25.012**	**204**	**646**	**217**	**1.103**	**144**	**46.545**
Usable production	147.012	63.105	7.491	70.021	8.328	979	7.857	11.012	3.722	319.527
Area (thousand ha)	*23.782*	*12.274*	*2.188*	*8.904*	*2.215*	*197*	*2.550*	*2.753*	*1.455*	*56.317*
Yield (tonnes/ha)	*6,2*	*5,1*	*3,4*	*7,9*	*3,8*	*5,0*	*3,1*	*4,0*	*2,6*	*5,7*
Imports (from third countries)	2.400	600	1.900	20.000	80	259	4		154	25.397
Total supply	**161.082**	**68.952**	**11.694**	**115.033**	**8.611**	**1.883**	**8.078**	**12.115**	**4.019**	**391.468**
Total domestic use	117.515	49.292	9.013	84.921	7.405	647	7.452	9.833	3.834	289.912
Human consumption	48.147	363	8.071	4.881	3.069	156	1.152	52	23	65.913
Seed	4.868	2.172	407	433	455	42	428	542	270	9.616
Industrial uses	11.600	9.156	95	12.507	1.311		103	449	202	35.423
of which bioethanol/biofuel	*5.000*	*437*		*6.800*	*700*			*344*	*14*	*13.295*
Animal feed	52.000	37.200	400	66.500	2.500	450	5.700	8.700	3.300	176.750
Losses	900	400	40	600	70		70	90	40	2.210
Exports (to third countries)	30.000	11.700	1.100	4.500	200	4	100	2	8	47.615
Total use	**147.515**	**60.992**	**10.113**	**89.421**	**7.605**	**652**	**7.552**	**9.835**	**3.843**	**337.527**
Ending stocks**	**13.567**	**7.960**	**1.581**	**25.612**	**1.006**	**1.232**	**526**	**2.280**	**176**	**53.941**
Change in stocks**	1.897	2.713	-722	601	802	586	309	1.178	32	7.396

* Marketing year: from July to June

** At the end of the marketing year

European Commission

EU + UK Cereals Balance Sheet 2019/20

- Production forecast : above average (319,5 million tonnes, + 10,2% y/y)
  - Increase of total cereal area (56,3 million hectars, 2,3% y/y)
  - Recovery of soft wheat and barley production
  - Good quality milling wheat at EU level
  - Quality issues for malting barley and durum wheat

- Decrease of maize imports

- Recovery of total exports, in particular for soft wheat and barley

- Increase of total ending stocks

EU 27 Cereals Balance Sheet

Thousand metric tonnes

LAST UPDATED: 26/03/2020	2019/20 (forecast)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**6.475**	**2.644**	**2.959**	**24.219**	**174**	**1.372**	**163**	**321**	**85**	**38.412**
Usable production	130.914	55.125	7.491	69.986	8.254	979	6.793	10.955	3.722	294.220
Area (thousand ha)	*21.968*	*11.112*	*2.188*	*8.897*	*2.183*	*197*	*2.368*	*2.741*	*2.789*	*54.443*
Yield (tonnes/ha)	*6,0*	*5,0*	*3,4*	*7,9*	*3,8*	*5,0*	*2,9*	*4,0*	*1,3*	*5,4*
Imports (from third countries)	3.500	2.400	2.100	19.400	20	50	90		100	27.660
Total supply	**140.890**	**60.170**	**12.551**	**113.606**	**8.448**	**2.401**	**7.046**	**11.276**	**3.906**	**360.292**
Total domestic use	101.964	44.115	9.011	81.820	7.245	639	6.481	8.762	3.785	263.821
Human consumption	41.462	361	8.071	4.698	3.000	155	989	52	23	58.809
Seed	4.600	2.131	400	402	395	29	350	500	270	9.076
Industrial uses	10.317	7.192	95	11.600	1.300		101	445	170	31.220
of which bioethanol/biofuel	*4.349*	*437*		*6.711*	*700*			*344*	*14*	*12.554*
Animal feed	44.800	34.100	400	64.700	2.500	450	5.000	7.700	3.300	162.950
Losses	785	331	45	420	50	6	41	66	22	1.705
Exports (to third countries)	30.800	10.800	1.200	5.700	300	13	200	14	17	49.044
Total use	**132.764**	**54.915**	**10.211**	**87.520**	**7.545**	**652**	**6.681**	**8.776**	**3.802**	**312.865**
Ending stocks**	**8.126**	**5.255**	**2.340**	**26.086**	**904**	**1.748**	**365**	**2.500**	**105**	**47.428**

Change in stocks**	1.650	2.610	-620	1.867	730	377	203	2.179	20	9.015

* Marketing year: from July to June

** At the end of the marketing year

European Commission

EU 27 Cereals Balance Sheet 2019/20

- Production forecast : above average (294,2 million tonnes, + 9,6% y/y)
  - Increase of total cereal area (53,1 million ha, 2,2% y/y)
  - Recovery of soft wheat and barley production
  - Good quality milling wheat at EU level
  - Quality issues for malting barley and durum wheat

- Decrease of maize and soft wheat imports

- Recovery of total exports, in particular for soft wheat and barley

- Increase of total ending stocks

2020/21 Marketing Year

	Winter Grains Sowings (Areas : 1000 ha)						
	HU	SE	FR	DE	HR	IT	CZ
Soft Wheat	995	410	4701	2838	136	537	759
Durum wheat			239			1230	
Barley	237	21	1307	1338	56	248	113
Rye	32	34		671			33
Triticale	93	29	280	344			38
Oats							
Total	**1357**	**494**	**6527**	**5191**	**192**	**2015**	**943**
Rapeseed	310	94	1081	953	38		369

Sources : Member States

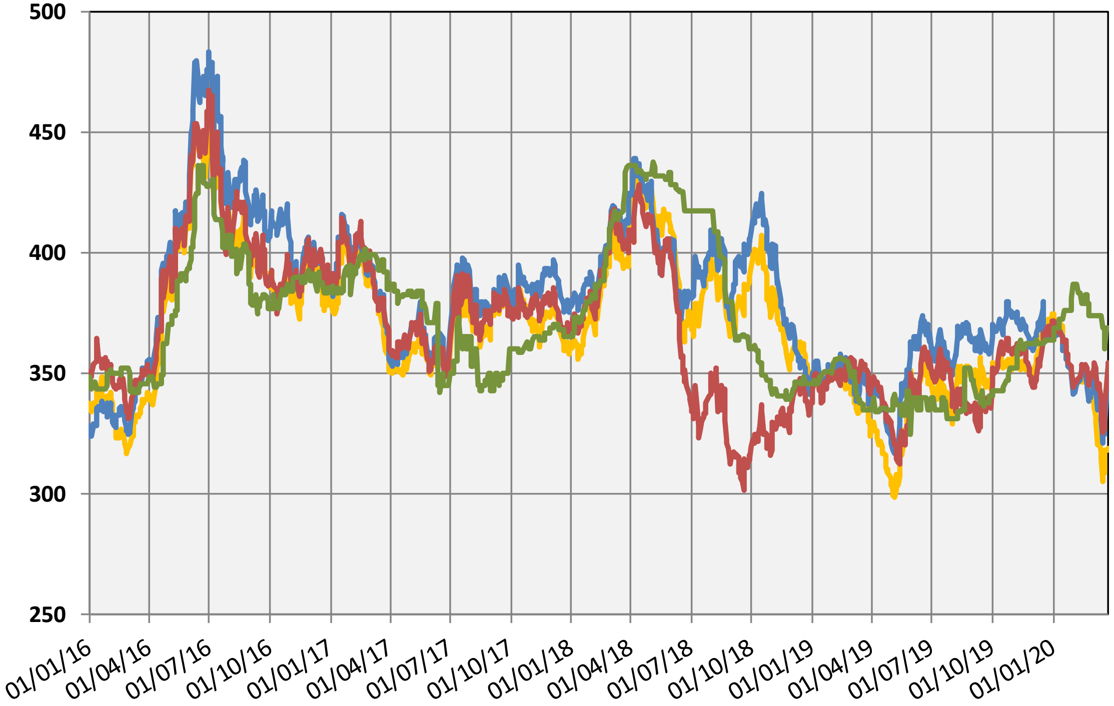
- Oilseeds

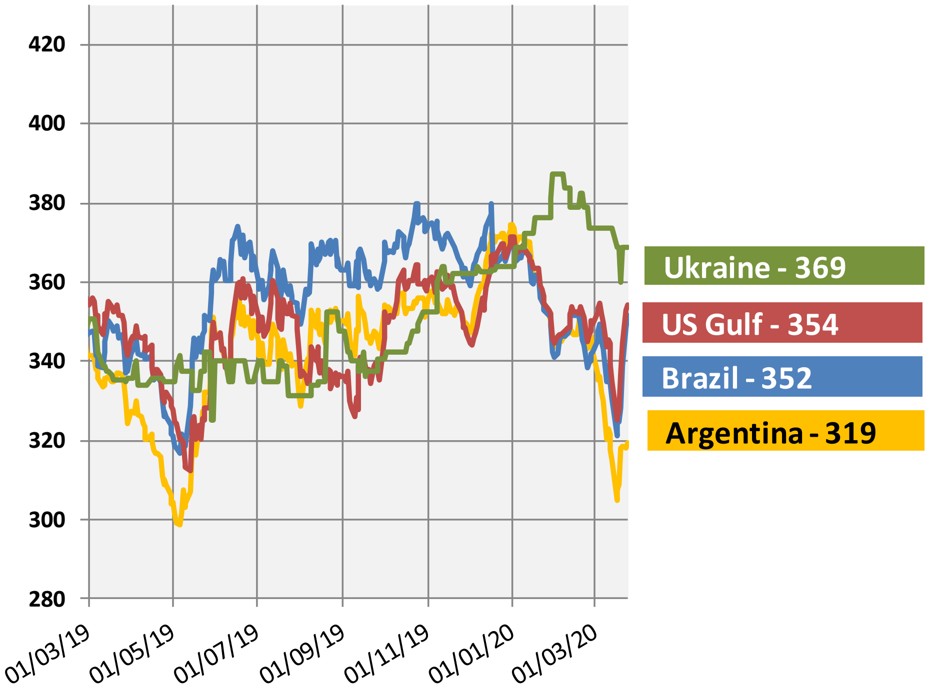
World Oilseeds prices: key messages

- Soya meal prices increased significantly during the last weeks against the backdrop of tightening global supplies e.g. in major meal producer Argentina and lower availabilities of DDGS used for feed (given the reduced ethanol production in US). The price rally pushed soya bean prices in the main producers US and BZ. Reports about Chinese buying of US soya and general concerns about disruption to South American shipments due to coronavirus-related transport problems provided further support and prices increased between 4-9% during last week.

- Rapeseed and sunflowerseed prices declined compared to a month ago. Despite recent strength in global oilseed markets rapeseed values in the EU continued to be weighed by uncertainties about future demand, including biodiesel use. EU Rapeseed prices are 8 -10% below last year prices. EU sunflower prices declined 9% from last month and are 5% down y/y.

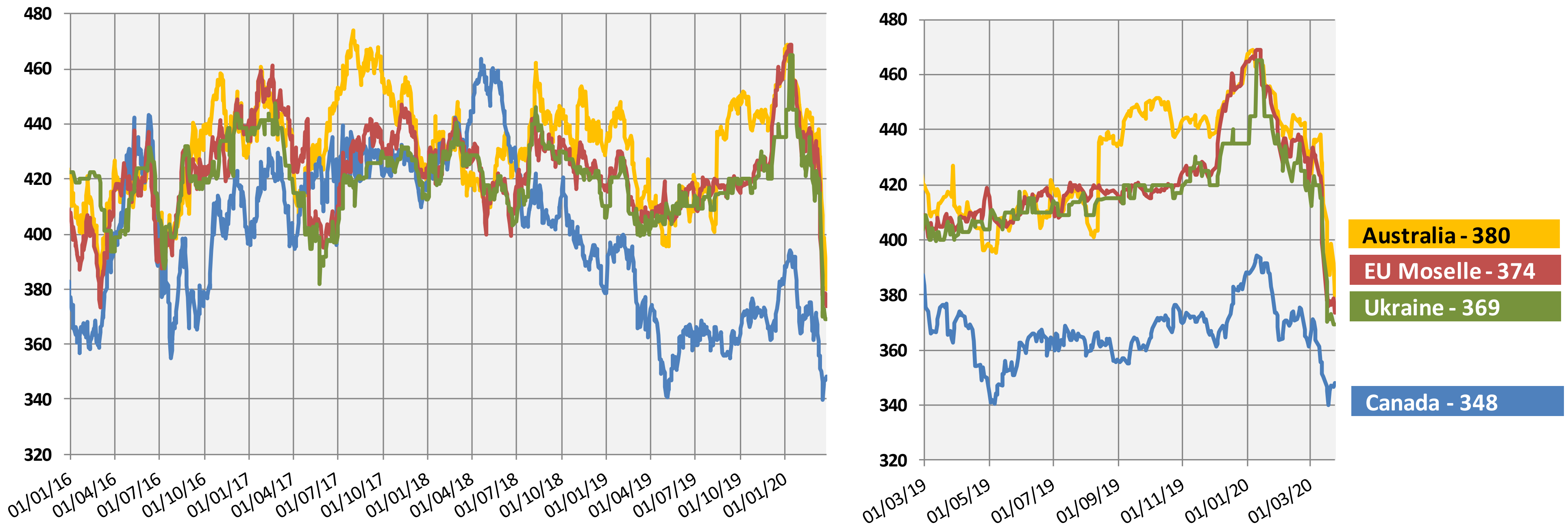
World export prices soya beans (USD/tonne)





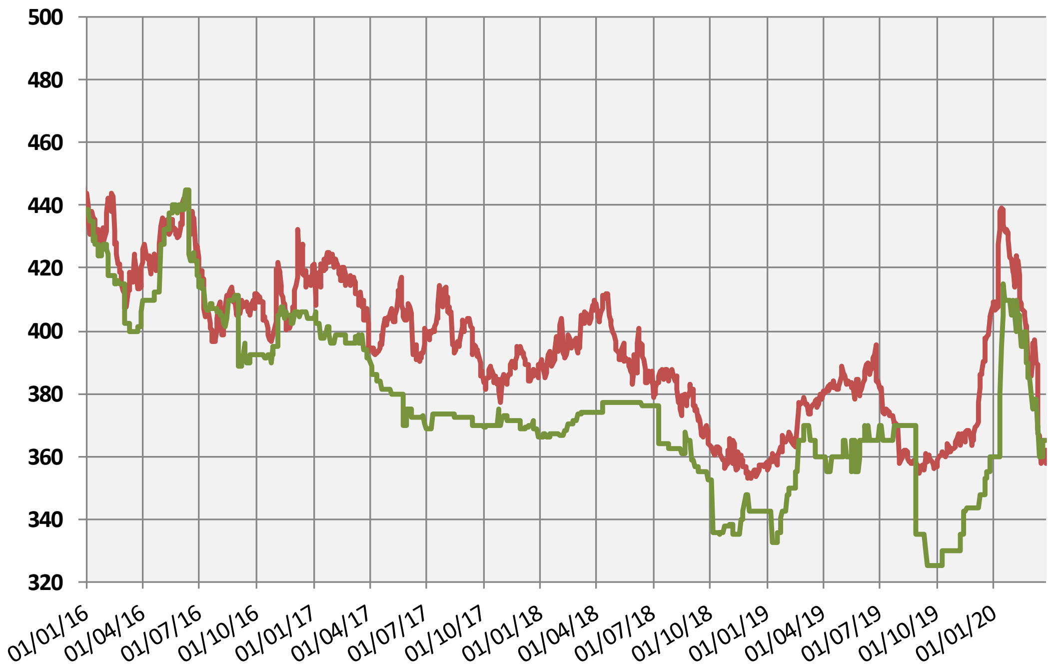
Source: International Grains Council

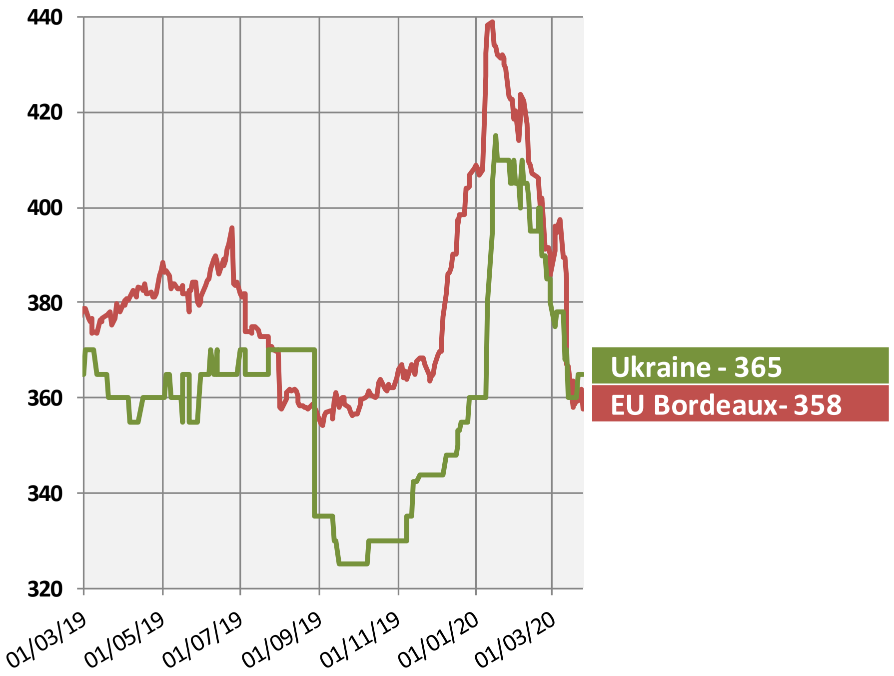
World export prices for rapeseed – (USD/tonne)



Source: International Grains Council

World export prices for sunflower – (USD/tonne)





Source: International Grains Council

EU+UK Oilseeds

EU OILSEEDS AREA

Million ha	AVG 5 yrs trimmed	2018/19	**2019/20 March**	change year on year	change on 5yrs AVG
Rapeseed	6,67	6,90	**5,55**	-19,5%	-16,7%
Sunflower	4,20	4,03	**4,33**	7,6%	3,2%
Soya Beans	0,89	0,96	**0,93**	-2,7%	4,1%
TOTAL	**11,76**	**11,88**	**10,81**	**-9%**	**-8%**

Sources : EC - DG AGRI

EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2018/19	**2019/20 March**	change 2018/19	change AVG 5yrs
Rapeseed	21,31	20,01	**16,69**	-16,6%	-21,7%
Sunflower	9,33	9,97	**10,10**	1,3%	8,3%
Soya Beans	2,51	2,83	**2,74**	-3,4%	9,1%
TOTAL	**32,88**	**32,82**	**29,52**	**-10,0%**	**-10,9%**

Sources : EC - DG AGRI

EU+UK rapeseed

Production Million tonnes	AVG 5 yrs trimmed	2018/19	**2019/20 March**	change year on year	%change 5yrs trimmed
TOTAL EU+UK	**21,31**	**20,01**	**16,69**	**-16,6%**	**-21,7%**
France	5,22	4,98	**3,44**	-31%	-34%
Germany	4,62	3,68	**2,83**	-23%	-39%
Poland	2,54	2,20	**2,29**	4%	-10%
Czechia	1,34	1,41	**1,16**	-18%	-14%
Romania	1,32	1,61	**0,69**	-57%	-48%
Other EU MS	4,05	4,12	**4,53**	10%	12%
UK	2,21	2,01	**1,75**	-13%	-21%

Sources : EC-DG AGRI

EU+UK Oilseeds 2019/20: key messages

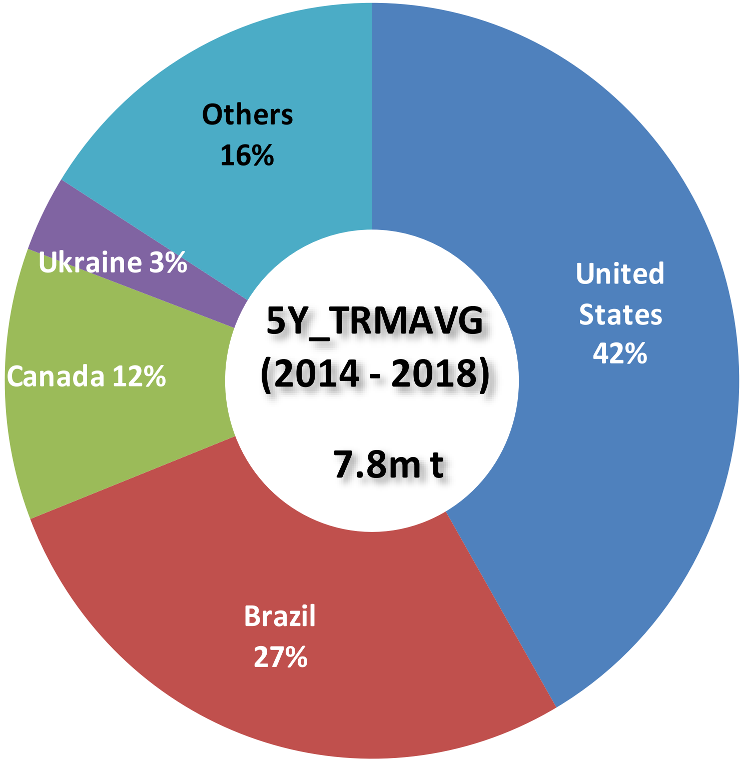
- Total oilseed **area** (EU+UK) 2019/20 is slightly down 9% from the previous month at 10.8 million hectares, 8% below the average. The major area reduction concerns rapeseed, which is down almost 20% from the previous year, while sunflower area is up.

- Oilseed **production** (EU+UK) for 2019/20 is down 10% from the previous year at 29.5 million tonnes on a significant drop in rapeseed production in the main producing member states. The annual decline is only partly offset by increases for sunflower and soya production. Total oilseed production is 11% down from the average.

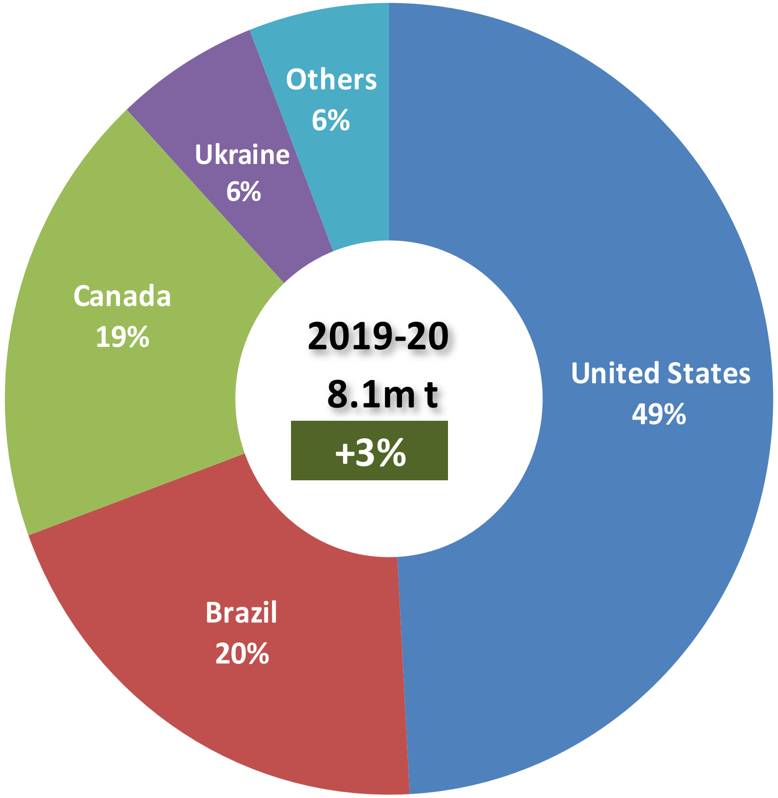
European Commission

EU+UK soya beans import origins

(July - January)



(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20		
United States	3 261	3 983	↑	*22%*
Brazil	2 148	1 642	↓	*-24%*
Canada	912	1 511	↑	*66%*
Ukraine	256	491	↑	*92%*
Others	1 258	479	↓	*-62%*

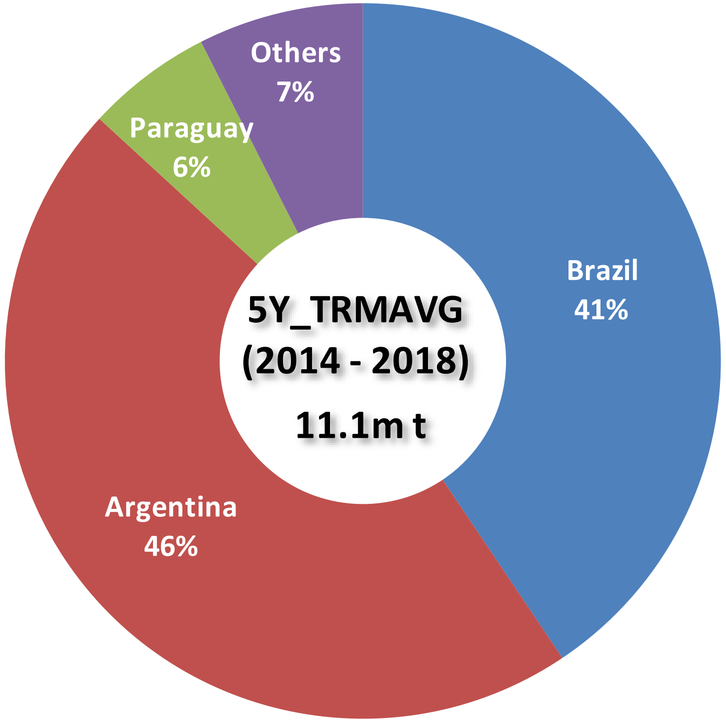


Source: Eurostat- Comext @ 31 Mar 2020

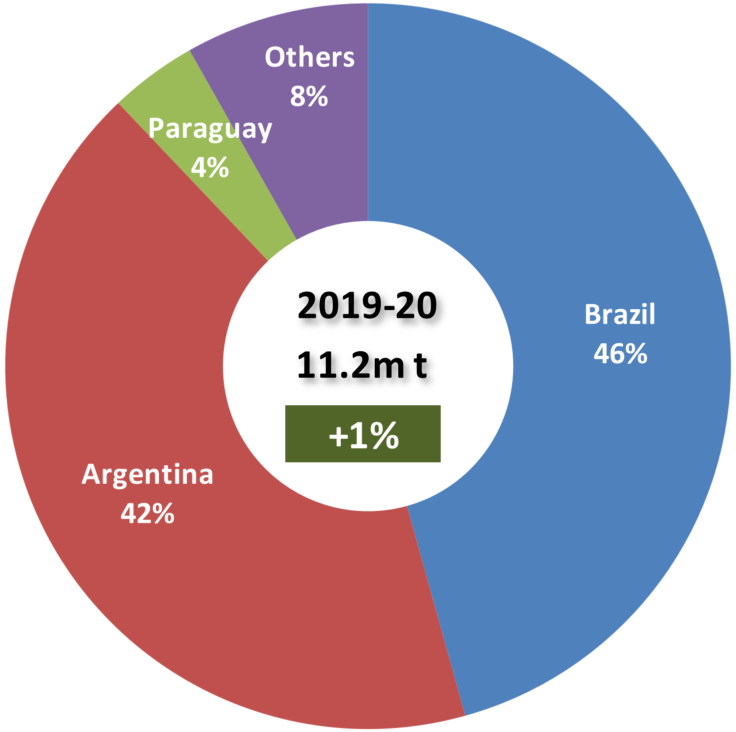
European Commission

EU+UK soya meal import origins

(July - January)



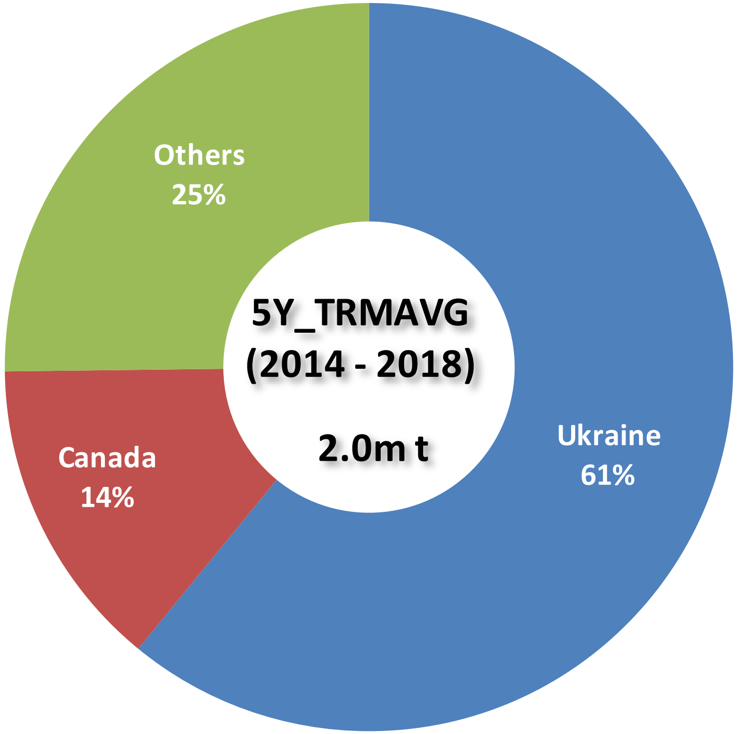
(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20		
Brazil	4 490	5 112	↑	*14%*
Argentina	5 115	4 725	↓	*-8%*
Paraguay	631	436	↓	*-31%*
Others	826	916	↑	*11%*



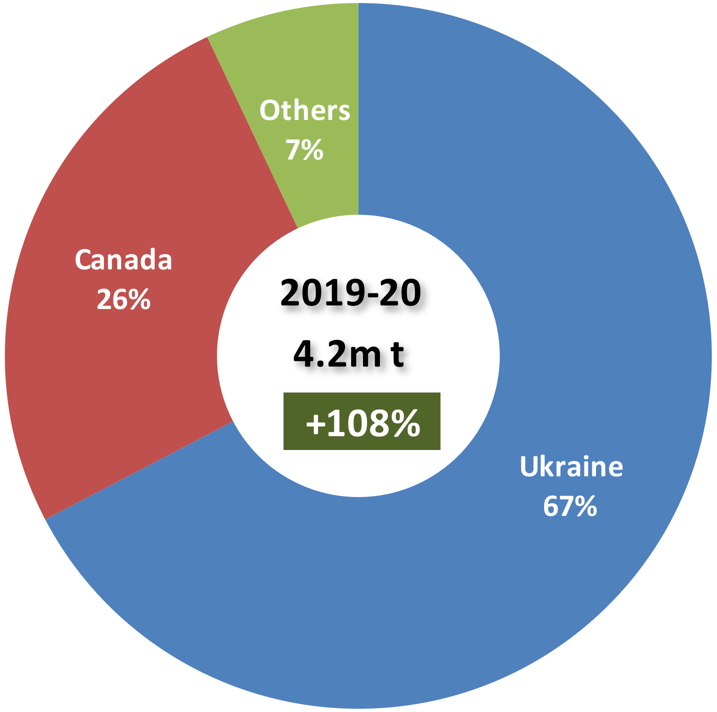
Source: Eurostat- Comext @ 31 Mar 2020

EU+UK rapeseed import origins

(July - January)



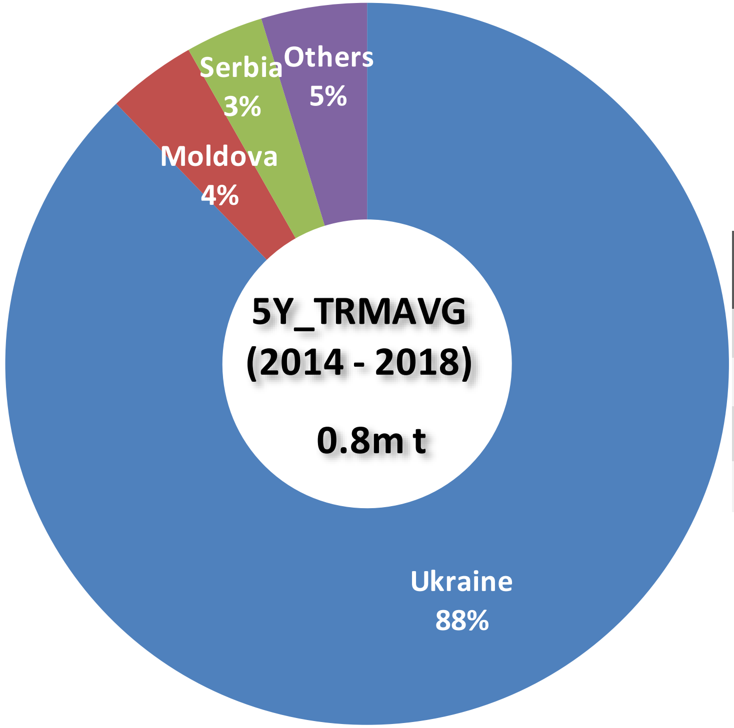
(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20	
Ukraine	1 228	2 830	130%
Canada	280	1 078	285%
Others	508	296	-42%



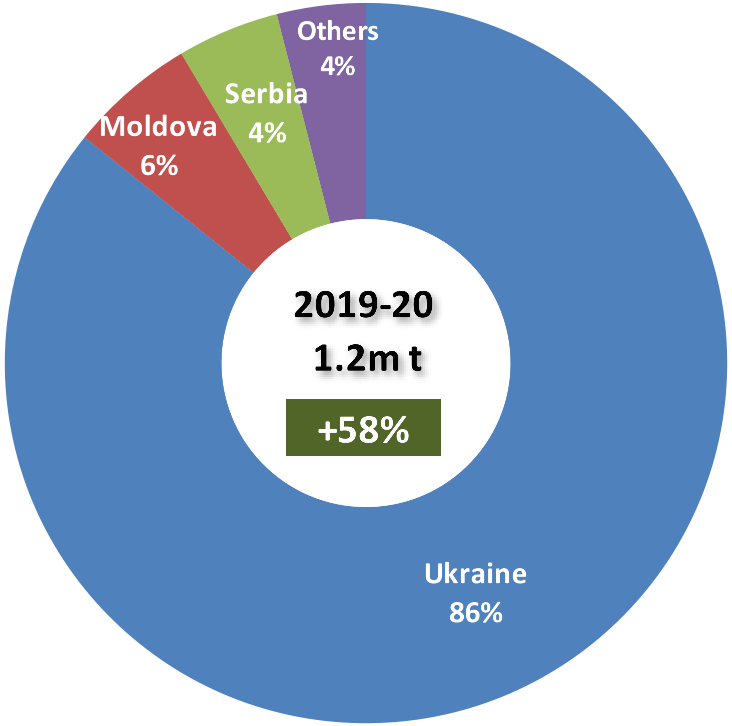
Source: Eurostat- Comext @ 31 Mar 2020

EU+UK sunflowerseed oil import origins

(July - January)



(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20		
Ukraine	681	1 052	↑	*54%*
Moldova	31	70	↑	*125%*
Serbia	27	56	↑	*107%*
Others	37	49	↑	*33%*

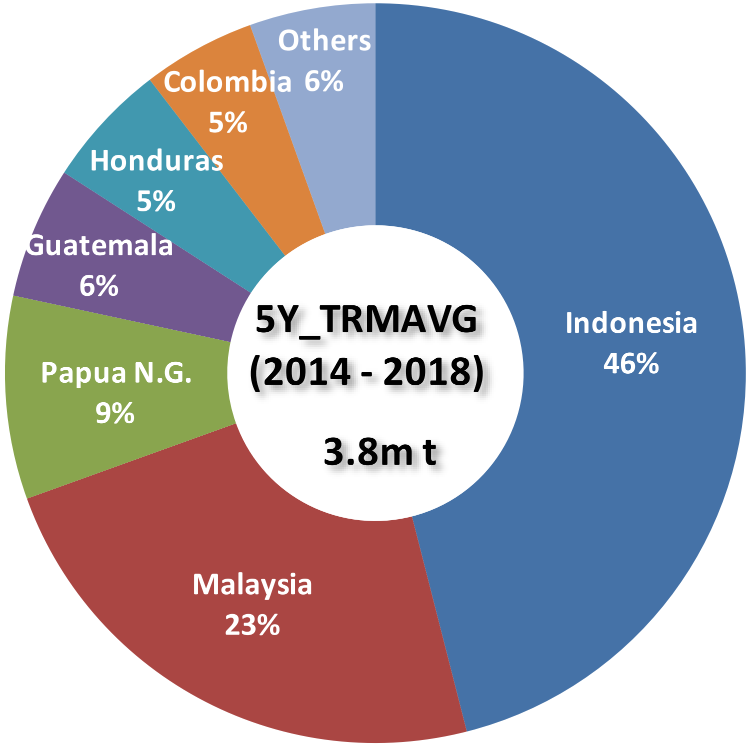


Source: Eurostat- Comext @ 31 Mar 2020

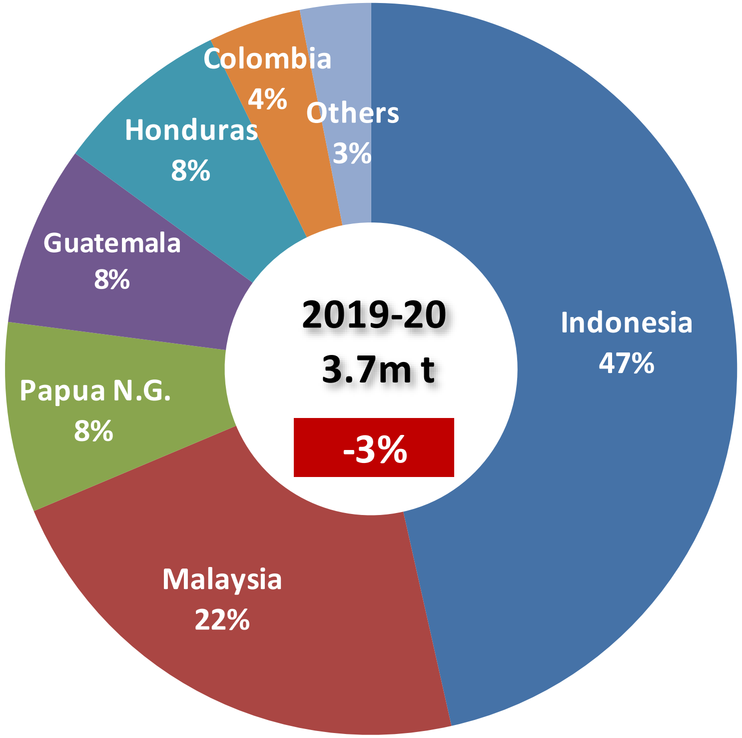
European Commission

EU+UK palm oil import origins

(July - January)



(Thousand t)	5Y_TRMAVG (2014 - 2018)	2019-20		
Indonesia	1 761	1 732	↓	*-2%*
Malaysia	897	826	↓	*-8%*
Papua N.G.	340	313	↓	*-8%*
Guatemala	220	297	↑	*35%*
Honduras	209	289	↑	*38%*
Colombia	189	153	↓	*-19%*
Others	210	116	↓	*-45%*



Source: Eurostat- Comext @ 31 Mar 2020

European Commission

Oilseeds balance sheet (EU+UK)

Thousand metric tonnes

OILSEED	2018/19				2019/20 fc			
LAST UPDATED: 26/03/2020	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
Beginning stocks	**2.287**	**2.296**	**937**	**5.520**	**1.520**	**2.140**	**891**	**4.551**
Usable production	20.015	2.833	9.973	32.820	16.688	2.735	10.100	29.524
Area (thousand ha)	*6.901*	*955*	*4.026*	*11.882*	*5.552*	*930*	*4.333*	*10.815*
Yield (tonnes/ha)	*2,9*	*3,0*	*2,5*	*2,8*	*3,0*	*2,9*	*2,3*	*2,7*
Imports (from third countries)	4.232	15.076	521	19.830	6.000	14.550	800	21.350
Total supply	**26.534**	**20.205**	**11.431**	**58.170**	**24.208**	**19.425**	**11.791**	**55.425**
Domestic use	24.924	17.907	10.014	52.846	23.108	18.158	10.464	51.730
of which crushing	*24.030*	*15.843*	*8.907*	*48.780*	*22.270*	*15.938*	*9.342*	*47.551*
Exports (to third countries)	89	158	526	772	100	167	503	770
Total use	**25.014**	**18.065**	**10.540**	**53.619**	**23.208**	**18.325**	**10.966**	**52.500**
Ending stocks	**1.520**	**2.140**	**891**	**4.551**	**1.000**	**1.100**	**825**	**2.925**

European Commission

Oilmeals balance sheet (EU+UK)

Thousand metric tonnes

OILSEED MEAL	2018/19				2019/20 fc			
LAST UPDATED: 26/03/2020	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
Beginning stocks	**50**	**344**	**100**	**494**	**50**	**343**	**100**	**493**
Usable production	13.697	12.516	4.899	31.112	12.694	12.591	5.138	30.423
Imports (from third countries)	521	18.022	3.468	22.011	350	18.700	3.400	22.450
Total supply	**14.268**	**30.882**	**8.467**	**53.617**	**13.094**	**31.634**	**8.638**	**53.366**
Domestic use	13.772	30.224	8.016	52.011	12.644	30.979	8.038	51.662
Exports (to third countries)	447	316	351	1.114	400	314	500	1.214
Total use	**14.218**	**30.539**	**8.367**	**53.125**	**13.044**	**31.294**	**8.538**	**52.876**
Ending stocks	**50**	**343**	**100**	**493**	**50**	**340**	**100**	**490**

European Commission

Vegetable oils balance sheet (EU+UK)

Thousand metric tonnes

VEGETABLE OILS	2018/19					2019/20 fc				
LAST UPDATED: 26/03/2020	Rapeseed	Soybean	Sunflower	Palm	TOTAL	Rapeseed	Soybean	Sunflower	Palm	TOTAL
Beginning stocks	**592**	**175**	**269**	**492**	**1.528**	**589**	**175**	**268**	**489**	**1.520**
Usable production	9.852	3.169	3.741	0	16.762	9.131	3.188	3.924	0	16.242
Imports (from third countries)	246	395	1.806	7.346	9.792	204	400	2.000	7.300	9.904
Total supply	**10.690**	**3.739**	**5.816**	**7.837**	**28.082**	**9.923**	**3.763**	**6.191**	**7.789**	**27.666**
Domestic use	9.891	2.703	4.998	7.206	24.798	9.130	2.788	5.467	7.163	24.548
Exports (to third countries)	210	861	550	143	1.764	200	800	450	140	1.591
Total use	**10.101**	**3.564**	**5.548**	**7.348**	**26.562**	**9.330**	**3.588**	**5.918**	**7.304**	**26.139**
Ending stocks	**589**	**175**	**268**	**489**	**1.520**	**594**	**175**	**273**	**485**	**1.527**

Oilseeds balance sheet (EU)

Thousand metric tonnes

OILSEED	2018/19				2019/20 fc			
LAST UPDATED: 26/03/2020	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
Beginning stocks	**2.057**	**2.140**	**937**	**5.134**	**1.372**	**1.990**	**891**	**4.254**
Usable production	18.003	2.833	9.973	30.808	14.938	2.706	10.100	27.745
Area (thousand ha)	*2.940*	*537*	*1.558*	*5.035*	*5.735*	*1.008*	*4.130*	*10.872*
Yield (tonnes/ha)	*6,1*	*5,3*	*6,4*	*6,1*	*2,6*	*2,7*	*2,4*	*2,6*
Imports (from third countries)	4.328	14.432	529	19.289	6.300	14.200	800	21.300
Total supply	**24.387**	**19.404**	**11.439**	**55.230**	**22.611**	**18.896**	**11.791**	**53.299**
Domestic use	22.724	17.201	9.953	49.879	21.404	17.613	10.396	49.414
of which crushing	*21.909*	*15.218*	*8.852*	*45.980*	*20.697*	*15.477*	*9.193*	*45.368*
Exports (to third countries)	290	213	595	1.098	300	264	570	1.134
Total use	**23.015**	**17.414**	**10.548**	**50.977**	**21.704**	**17.878**	**10.966**	**50.548**
Ending stocks	**1.372**	**1.990**	**891**	**4.254**	**907**	**1.019**	**825**	**2.750**

Oilmeals balance sheet (EU)

Thousand metric tonnes

OILSEED MEAL	2018/19				2019/20 fc			
LAST UPDATED: 26/03/2020	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
Beginning stocks	**50**	**344**	**100**	**494**	**50**	**343**	**100**	**493**
Usable production	12.488	12.022	4.869	29.379	11.798	12.227	5.056	29.081
Imports (from third countries)	571	16.532	3.242	20.346	500	18.400	3.500	22.400
Total supply	**13.110**	**28.899**	**8.211**	**50.219**	**12.348**	**30.970**	**8.656**	**51.973**
Domestic use	12.554	27.867	7.600	48.021	11.698	29.941	7.956	49.594
Exports (to third countries)	506	689	511	1.706	600	689	600	1.889
Total use	**13.060**	**28.557**	**8.111**	**49.727**	**12.298**	**30.630**	**8.556**	**51.483**
Ending stocks	**50**	**343**	**100**	**493**	**50**	**340**	**100**	**490**

European Commission

Vegetable oils balance sheet (EU)

Thousand metric tonnes

VEGETABLE OILS	2018/19					2019/20 fc				
LAST UPDATED: 26/03/2020	Rapeseed	Soybean	Sunflower	Palm	TOTAL	Rapeseed	Soybean	Sunflower	Palm	TOTAL
Beginning stocks	**592**	**175**	**269**	**492**	**1.528**	**589**	**175**	**268**	**489**	**1.520**
Usable production	8.983	3.044	3.718	0	15.744	8.486	3.095	3.861	0	15.442
Imports (from third countries)	495	400	1.711	7.082	9.688	400	450	2.100	7.600	10.550
Total supply	**10.069**	**3.619**	**5.698**	**7.574**	**26.961**	**9.475**	**3.720**	**6.229**	**8.089**	**27.513**
Domestic use	9.220	2.402	4.703	6.857	23.182	8.581	2.545	5.355	7.404	23.886
Exports (to third countries)	261	1.042	728	228	2.258	300	1.000	600	200	2.100
Total use	**9.481**	**3.444**	**5.431**	**7.085**	**25.440**	**8.881**	**3.545**	**5.955**	**7.604**	**25.986**
Ending stocks	**589**	**175**	**268**	**489**	**1.520**	**594**	**175**	**273**	**485**	**1.527**

European Commission

- Proteins

EU+UK protein crops

EU PROTEIN CROPS AREA

Million ha	AVG 5 yrs trimmed	2018/19	**2019/20 March**	change 2018/19	change 5yrs trimmed
Field peas	0,84	0,87	**0,83**	-4,6%	-1,7%
Broad beans	0,63	0,62	**0,57**	-9,1%	-10,6%
Sweet lupins	0,17	0,15	**0,19**	23,3%	12,2%
TOTAL	**1,67**	**1,64**	**1,58**	**-4%**	**-6%**

Sources : EC - DG AGRI

EU PROTEIN CROPS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2018/19	**2019/20 March**	change 2018/19	change AVG 5 years
Field peas	2,13	2,00	**2,20**	9,9%	3,2%
Broad beans	1,76	1,40	**1,73**	23,7%	-1,7%
Sweet lupins	0,26	0,19	**0,26**	39,2%	0,4%
TOTAL	**4,17**	**3,59**	**4,19**	**16,8%**	**0,3%**

Sources : EC - DG AGRI

Protein crops balance sheet 2019/20 (EU+UK)

Thousand metric tonnes

PROTEIN CROPS 19/20 last updated 26/03/2020	Peas	Broad beans	Sweet lupins	Chickpeas	Lentils	Other dry pulses	TOTAL 19/20	TOTAL 18/19	Change 18/19
Beginning stocks	-	-	-	-	-	-	-	-	-
Usable production	2,199	1,744	260	166	105	643	5,118	4,584	11.7%
Imports	444	9	192	160	182	364	1,351	1,578	-14.4%
Total supply	**2,643**	**1,753**	**452**	**326**	**287**	**1,008**	**6,469**	**6,162**	**5.0%**
Domestic use	2,517	1,467	452	302	283	982	6,004	5,624	6.7%
- Food	*944*	*310*	*4*	*302*	*283*	*517*	*2,361*	*1,885*	*25.2%*
- Feed	*1,573*	*1,157*	*447*	-	-	*465*	*3,643*	*3,739*	*-2.6%*
Exports	126	286	0	24	4	25	465	538	-13.6%
Total Use	**2,643**	**1,753**	**452**	**326**	**287**	**1,008**	**6,469**	**6,162**	**5.0%**
Ending stocks	-	-	-	-	-	-	-	-	-

sources: EC - DG AGRI

Protein crops balance sheet 2019/20 (EU+UK)

- Total production: 535 thousand tonnes (11.7%) higher production compared with 2018/19, food use increased by 25%, while import and export both 14% down.
- Peas: 200 thousand tonnes higher production, offset by 200 thousand tonnes less imports, 35 thousand tonnes lower exports. Shift from feed to food use by 400 thousand tonnes.
- Broad beans: 345 thousand tonnes higher production, 45 thousand tonnes lower exports, domestic use 390 thousand tonnes higher both food and feed purposes.
- Sweet lupines: 74 thousand tonnes higher production, especially Poland, 30 thousand lower imports, feed use is 44 thousand tonnes higher.
- Chickpeas: 50 thousand tonnes lower production, especially Spain and Italy, imports and exports slightly up, resulting in 45 thousand tonnes lower use.
- Lentils: both 10 thousand tonnes lower production and imports, resulting in 20 thousand tonnes lower consumption.

Protein crops balance sheet 2019/20 (EU)

Thousand metric tonnes

PROTEIN CROPS 19/20 last updated 26/03/2020	Peas	Broad beans	Sweet lupins	Chickpeas	Lentils	Other dry pulses	TOTAL	TOTAL 18/19	Change 18/19
Beginning stocks	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
Usable production	2,035	1,059	260	166	105	643	4,269	4,075	4.8%
Imports	448	110	192	161	186	368	1,465	1,684	-13.0%
Total supply	**2,483**	**1,169**	**452**	**327**	**291**	**1,011**	**5,734**	**5,759**	**-0.4%**
Domestic use	2,261	879	451	302	285	983	5,162	5,149	0.2%
- Food	*794*	*108*	*4*	*302*	*285*	*517*	*2,010*	*1,676*	*19.9%*
- Feed	*1,467*	*772*	*447*	*-*	*-*	*466*	*3,152*	*3,473*	*-9.2%*
Exports	222	290	0	25	6	28	572	610	-6.3%
Total Use	**2,483**	**1,169**	**452**	**327**	**291**	**1,011**	**5,734**	**5,759**	**-0.4%**
Ending stocks	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**

sources: EC - DG AGRI

Protein crops balance sheet 2019/20 (EU)

Comparison of EU+UK and EU (main differences in broad beans and peas)

- Broad beans: production 700 thousand tonnes lower as UK is a major producer, import 100 thousand tonnes higher, resulting in 600 thousand tonnes lower consumption.
- Peas: 160 thousand tonnes lower production, exports are 100 thousand tonnes higher, resulting in 250 thousand tonnes lower consumption for EU27.

Thank you

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 are still displayed