

# Cereals, Oilseeds and Protein Crops

## Market Situation

**CROPS Market Observatory**  
**3 April 2019**



# Agro-weather conditions

# Areas of Concern

## AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 February 2019 until 22 March 2019



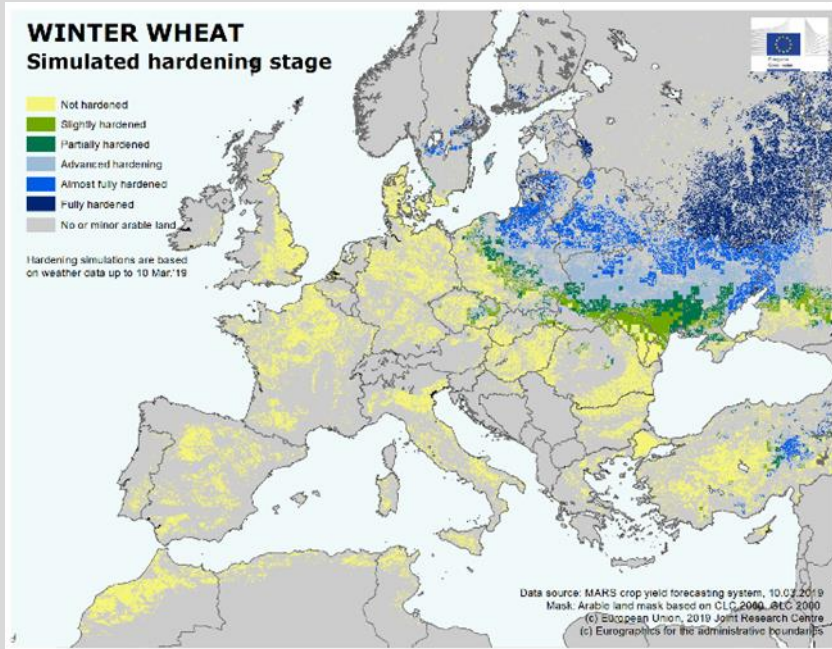
 Rain deficit  Temperature accumulation surplus

- Temperature anomalies

- Rain deficit

- Mediterranean region:
  - Rainfall below 50% LTA
  - Rain deficit up to 50 mm
- HU, SK, RO, BG, EL

# Winter cereals



- Hardening
  - Not or just slightly hardened in western and southern Europe
  - De-hardening started
  - No frost-kill damage
- Stage of development
  - Advanced
  - Reduced rapeseed area



# EU market situation

- **Cereals**
- **Oilseeds**
- **Protein crops**



# Cereals

# EU Cereals Production: 2019/20 forecast

EVOLUTION OF THE EU CEREALS USABLE PRODUCTION					
Million tonnes	2017/2018	2018/2019	2019/2020 Feb fcst	2019/2020 March fcst	% change 2018/2019
<b>TOTAL</b>	<b>305.3</b>	<b>290.5</b>	<b>308.1</b>	<b>307.5</b>	5.9
Soft wheat	142.0	128.7	140.8	140.2	8.9
Durum wheat	8.7	8.7	8.3	8.3	-4.6
Barley	58.3	56.1	60.2	60.3	7.5
Maize	64.8	69.1	68.4	68.4	-1.0
Rye	7.2	6.2	7.9	7.9	27.4
Oats	8.1	7.6	8.0	7.9	3.9

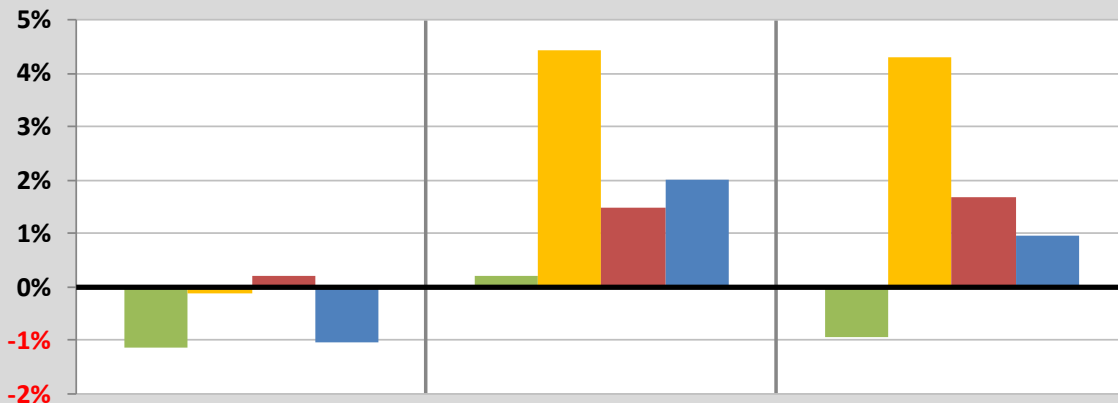
Sources : DG AGRI -G4

# EU cereals production

## 2019/20 forecast: 307.5 million tonnes

2019/20 vs 5 year-trimmed average

Area      Yield      Production



Soft wheat

Maize

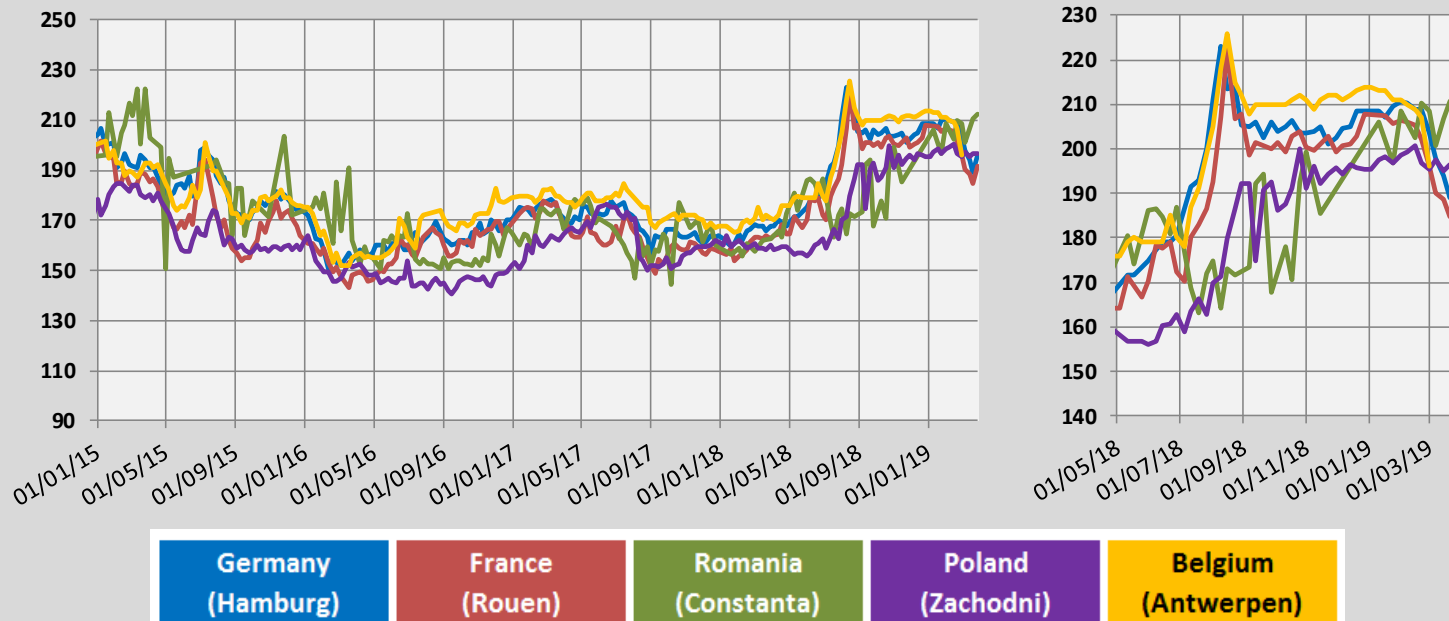
Barley

Cereals

- lower area (excl. Barley)
- higher yields
- higher production (excl. Soft wheat)

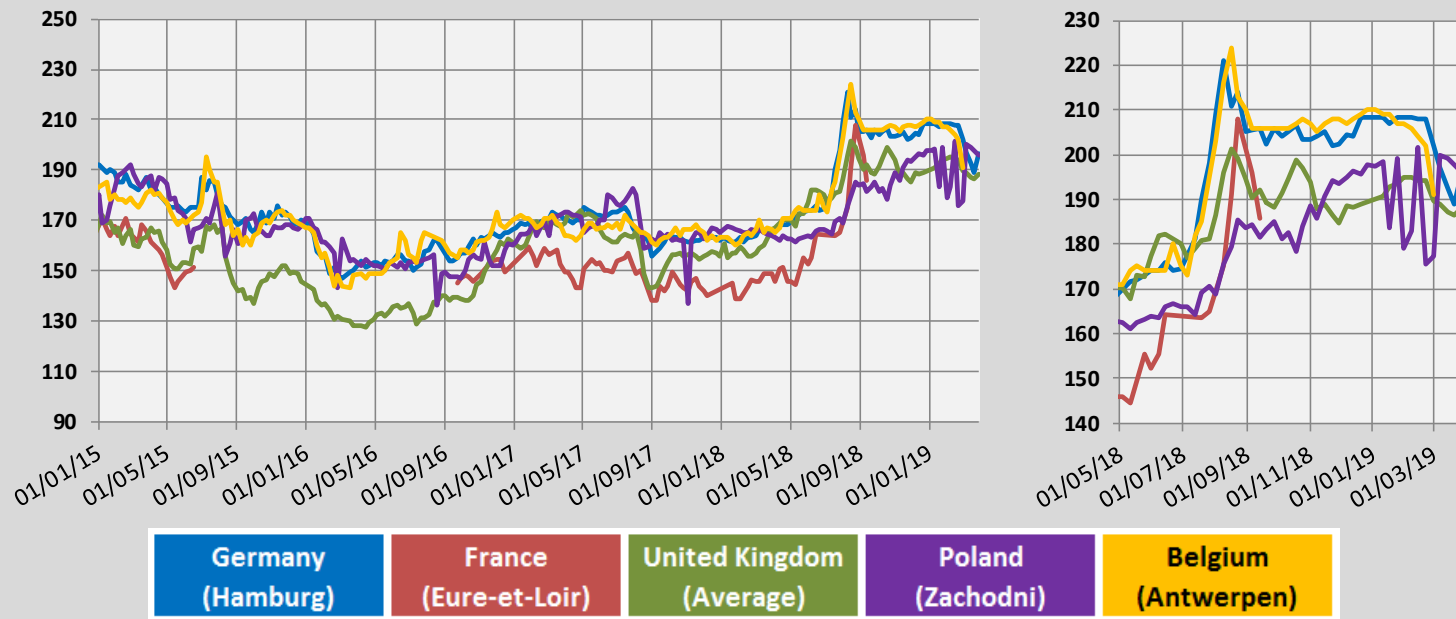


# EU market prices for milling wheat (€/t)



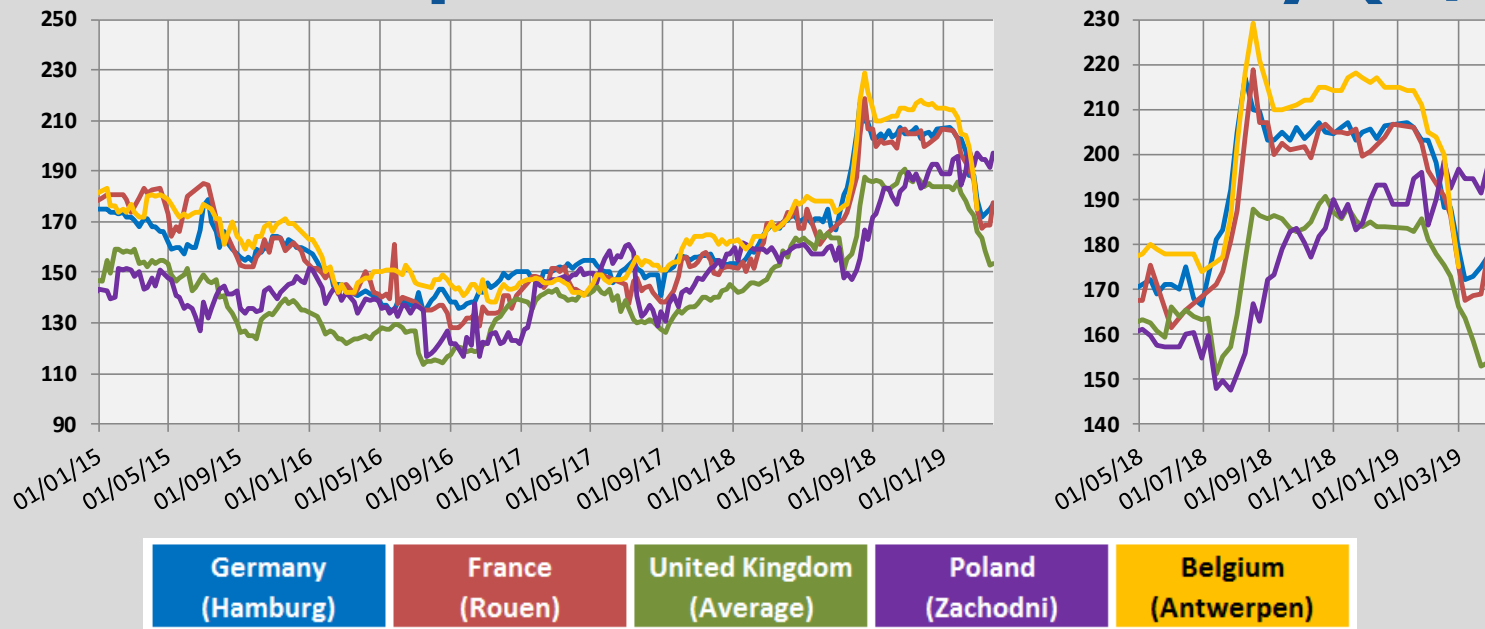
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# EU market prices for feed wheat (€/t)



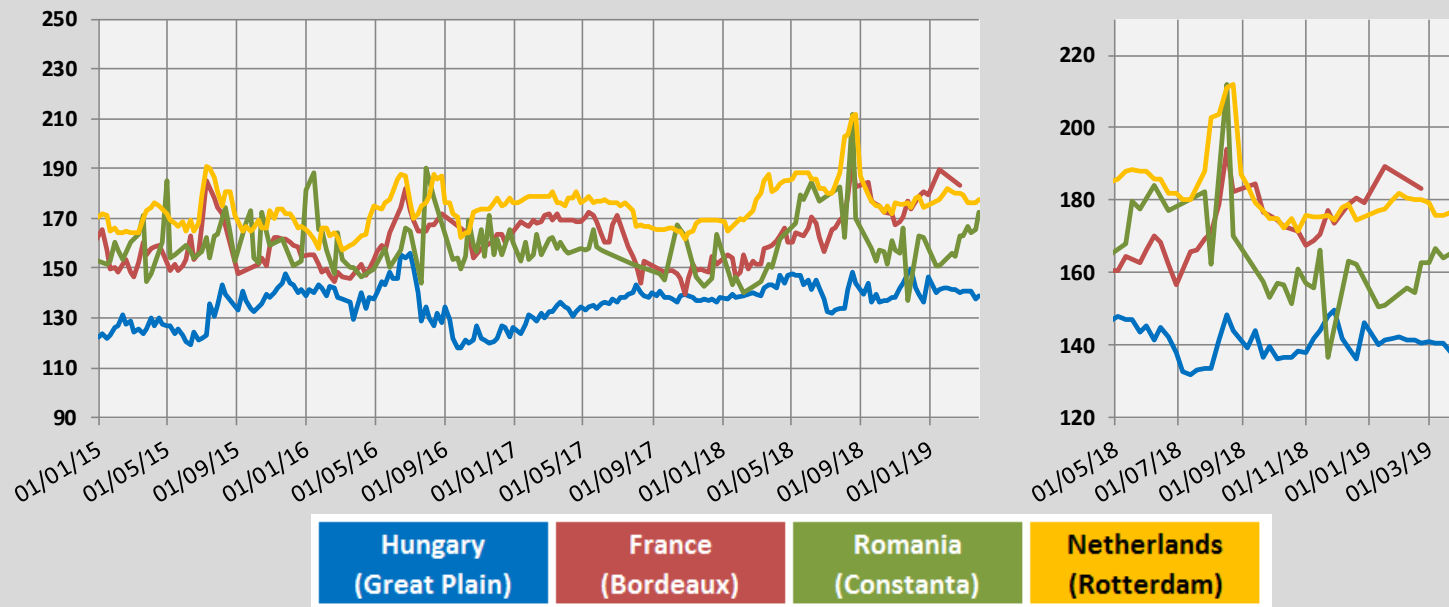
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# EU market prices for feed barley (€/t)



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

# EU market prices for maize (€/t)



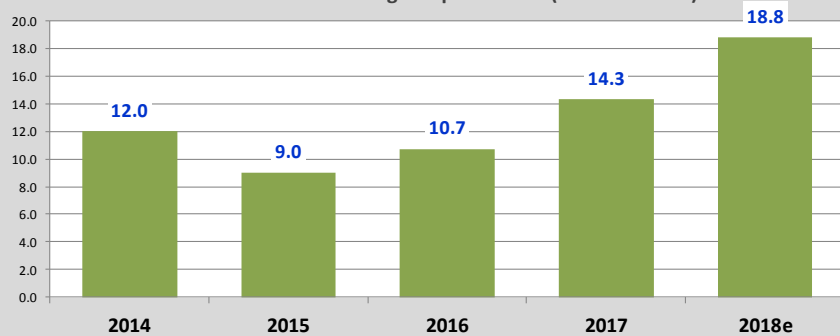
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# EU Cereals Balance Sheet

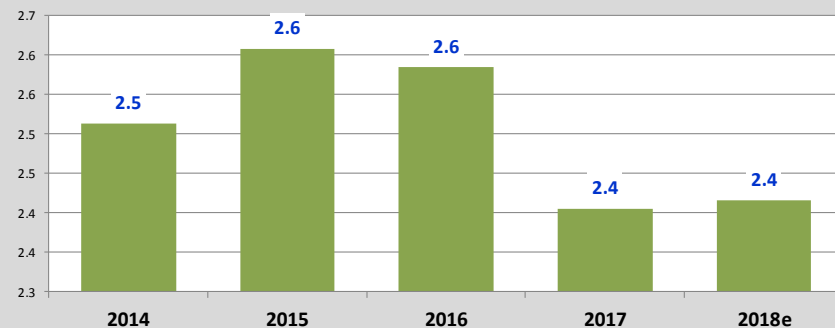
EU 28 total cereals balance sheet (thousand tonnes)					
LAST UPDATED: 28/03/2019	2015/16	2016/17	2017/18	2018/19 est	2019/20 fc
<b>Beginning stocks</b>	<b>46 199</b>	<b>43 584</b>	<b>37 081</b>	<b>47 332</b>	<b>48 356</b>
Usable production	311 699	296 699	305 296	290 520	307 512
<i>Area (thousand ha)</i>	<i>57 279</i>	<i>56 778</i>	<i>55 210</i>	<i>55 118</i>	<i>55 842</i>
<i>Yield (tonnes/ha)</i>	<i>5.4</i>	<i>5.2</i>	<i>5.5</i>	<i>5.3</i>	<i>5.5</i>
Imports (from third countries)	20 832	19 310	24 544	27 867	21 322
<b>Total supply</b>	<b>378 730</b>	<b>359 592</b>	<b>366 921</b>	<b>365 719</b>	<b>377 191</b>
Total domestic use	284 300	284 286	286 046	287 442	286 692
Human consumption	65 144	65 415	65 686	65 815	65 815
Seed	9 575	9 569	9 288	9 244	9 244
Industrial uses	33 971	34 212	34 751	34 686	34 686
<i>of which bioethanol/biofuel</i>	<i>11 989</i>	<i>12 197</i>	<i>12 613</i>	<i>12 659</i>	<i>12 959</i>
Animal feed	173 400	172 880	174 111	175 487	174 737
Losses	2 210	2 210	2 210	2 210	2 210
Exports (to third countries)	50 846	38 226	33 543	29 920	38 422
<b>Total use</b>	<b>335 146</b>	<b>322 511</b>	<b>319 589</b>	<b>317 363</b>	<b>325 115</b>
<b>Ending stocks</b>	<b>43 584</b>	<b>37 081</b>	<b>47 332</b>	<b>48 356</b>	<b>52 076</b>
Change in stocks	-2 615	-6 502	10 251	1 024	3 720

# Romania - Maize

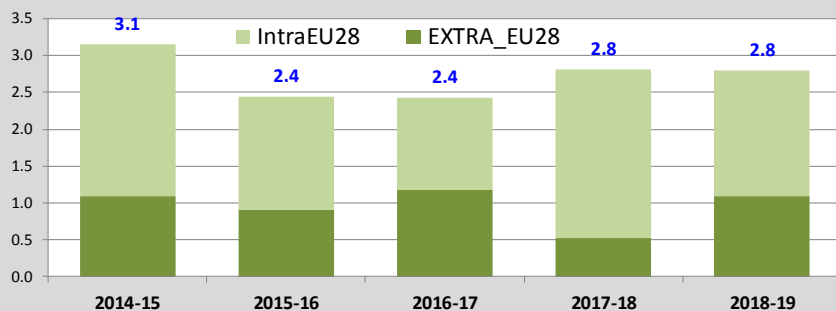
Romania: gross production (million tonnes)



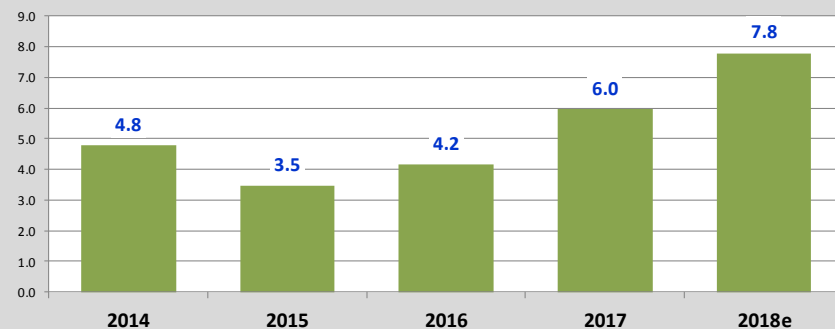
Romania: area (million hectares)



Romania: maize exports (million tonnes) - 7 months (July - January)



Romania: yield (tonnes/hectare)

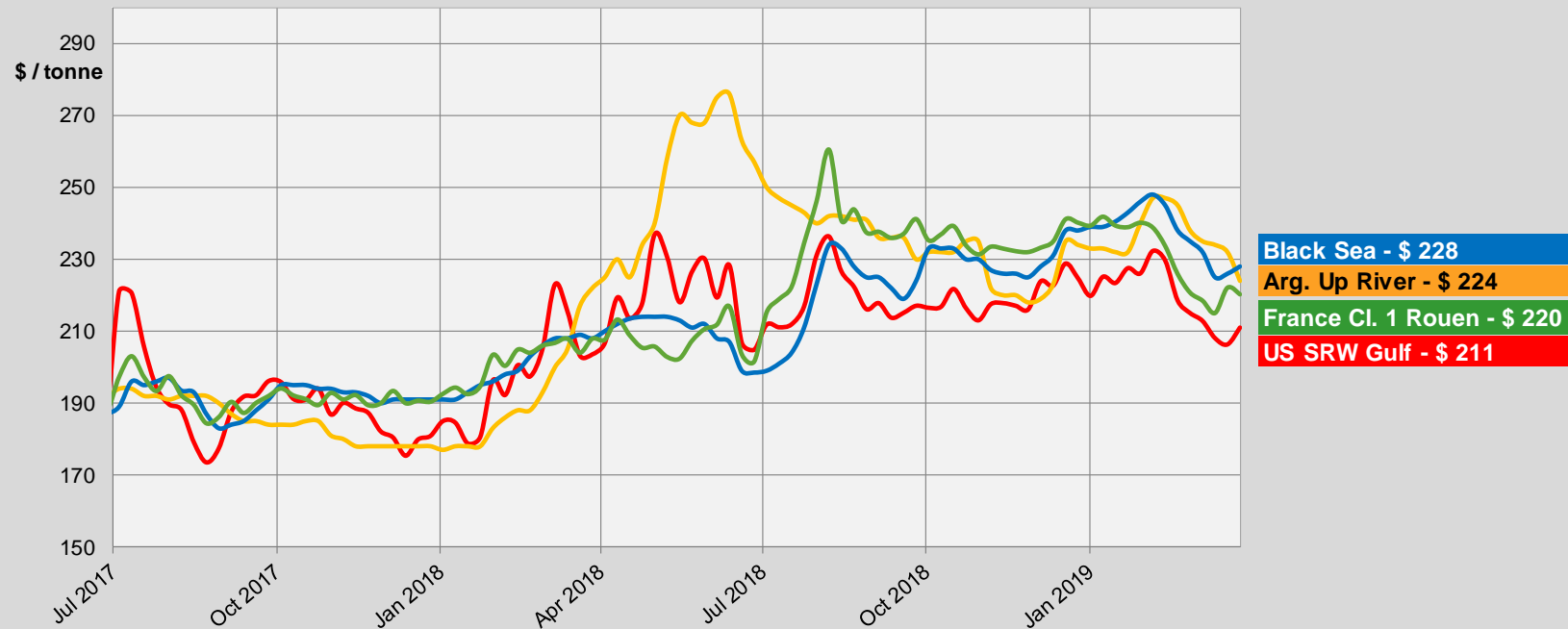




# EU Cereals Market

Romania production estimates - yield evolution, export figures and further production expansion ?

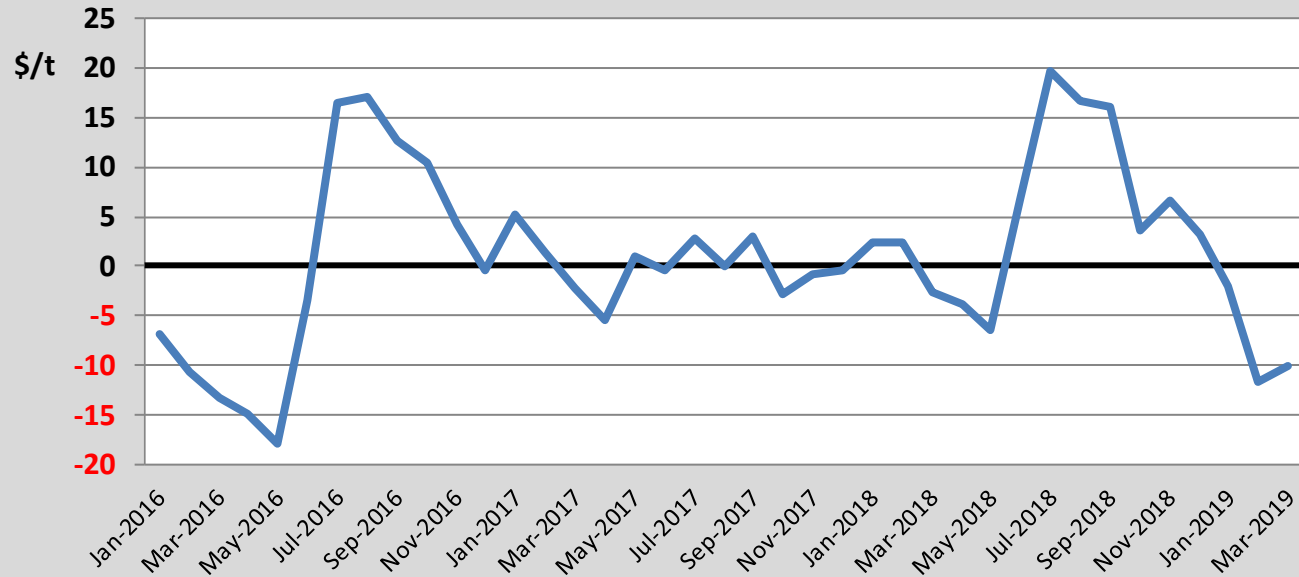
# Milling Soft Wheat FOB export prices



Source: IGC

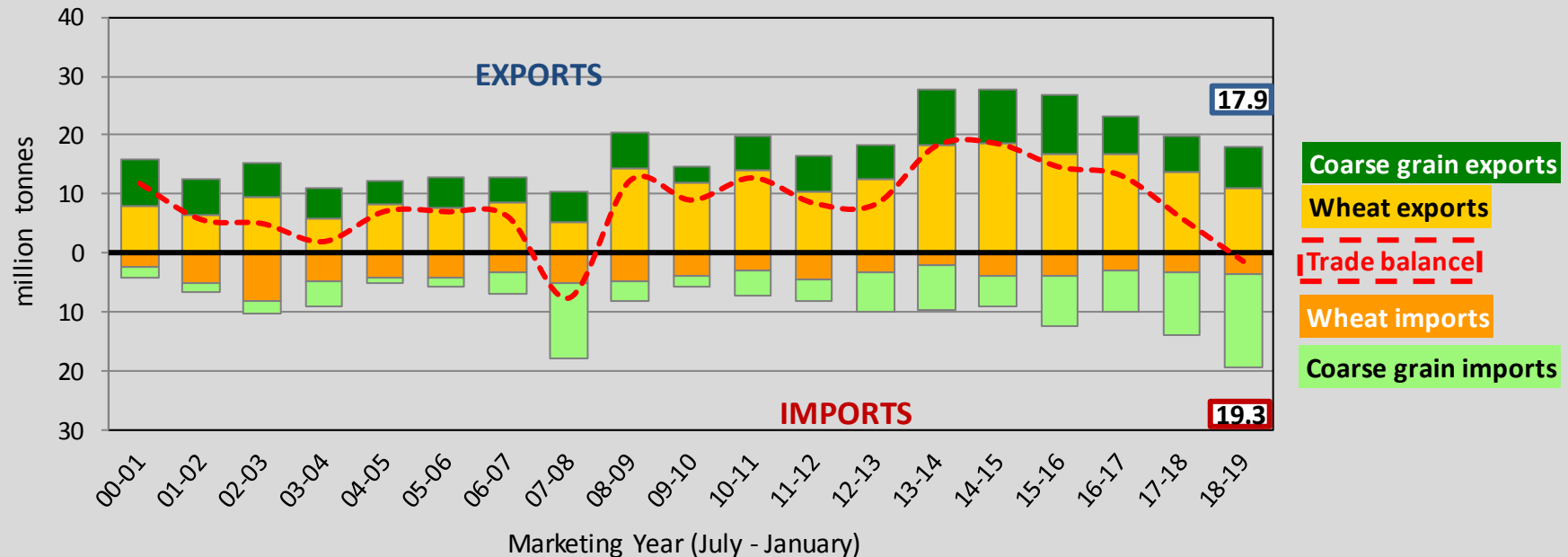


# Monthly Average FOB price spread between EU and Russian Wheat

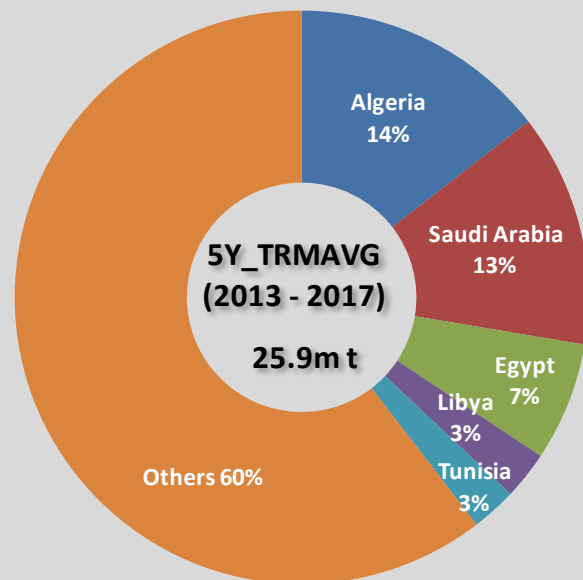


- Spread between EU (France) Grade 1 Rouen and Black Sea/Russia Milling.
- Negative values when EU prices are below Russian prices
- Source: daily quotes - International Grain Council

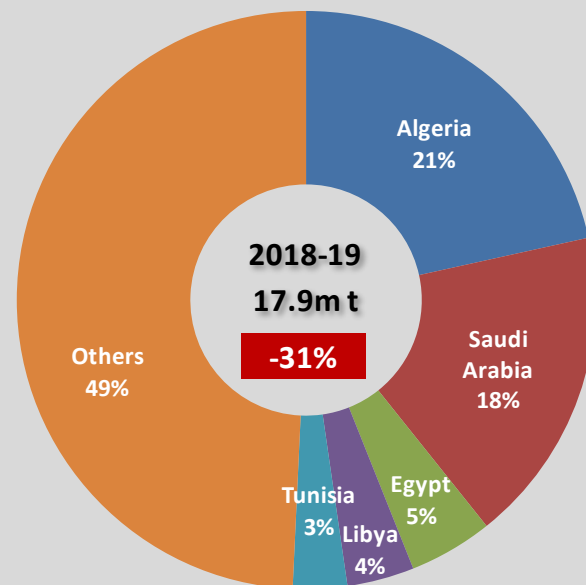
## EU28 – Cereals exports and imports – (July - January) including flour and groats in grain equivalent



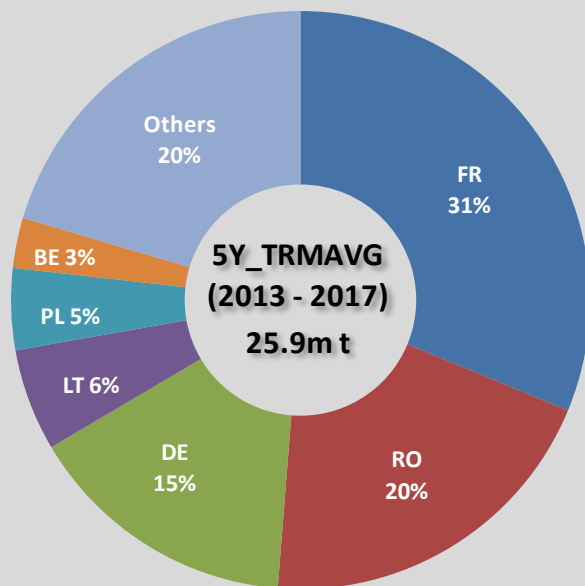
# EU all cereals export destinations (July - January)



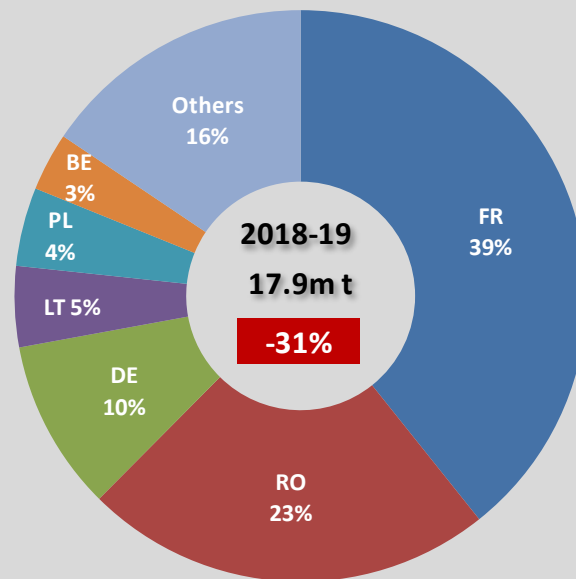
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Algeria	3 758	3 847	↑	2%
Saudi Arabia	3 406	3 168	↓	-7%
Egypt	1 734	836	↓	-52%
Libya	700	670	↓	-4%
Tunisia	657	541	↓	-18%
Others	15 665	8 798	↓	-44%



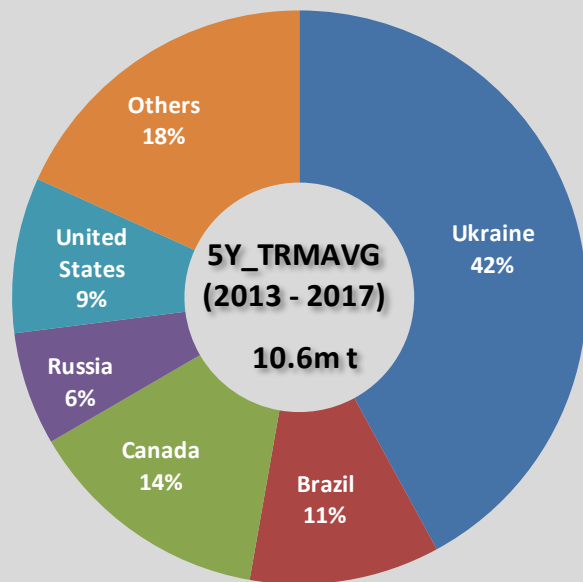
## EU MS exporting all cereals (July - January)



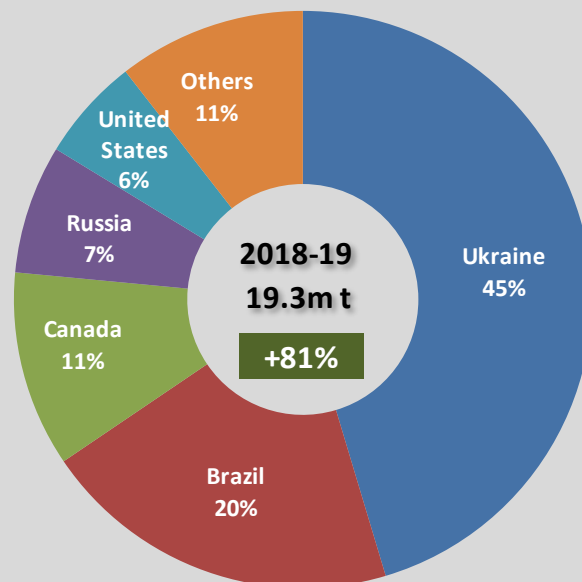
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
FR	8 098	7 015 ↓	-13%
RO	5 187	4 137 ↓	-20%
DE	3 953	1 728 ↓	-56%
LT	1 481	817 ↓	-45%
PL	1 184	795 ↓	-33%
BE	727	589 ↓	-19%
Others	5 291	2 781 ↓	-47%



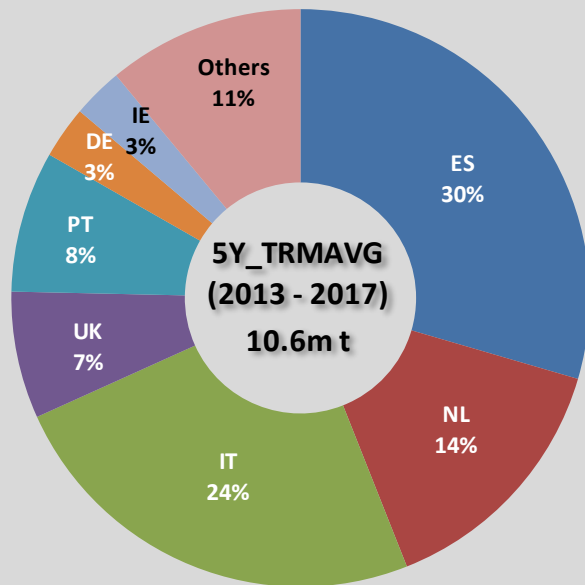
## EU all cereals import origins (July - January)



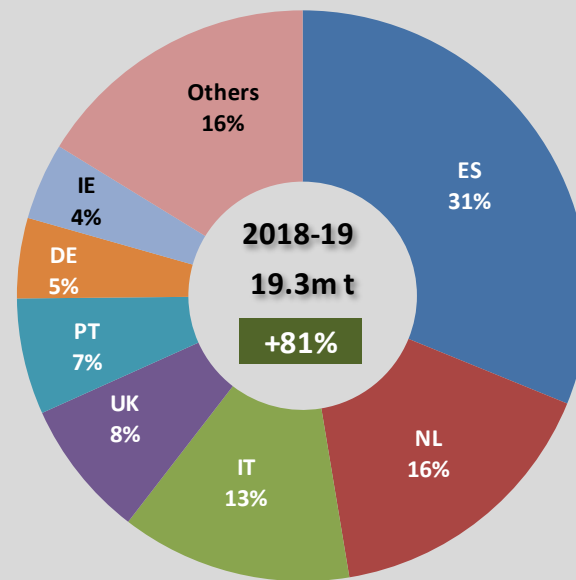
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Ukraine	4 470	8 743	↑	96%
Brazil	1 139	3 884	↑	241%
Canada	1 471	2 116	↑	44%
Russia	679	1 391	↑	105%
United States	931	1 112	↑	19%
Others	1 939	2 026	↑	5%



## EU MS importing all cereals (July - January)



	5Y_TRMAVG (2013 - 2017)	2018-19	
(Thousand t)			
ES	3 138	6 005 ↑	91%
NL	1 539	3 126 ↑	103%
IT	2 577	2 519 ↓	-2%
UK	756	1 506 ↑	99%
PT	840	1 268 ↑	51%
DE	311	877 ↑	182%
IE	299	841 ↑	181%
Others	1 169	3 128 ↑	168%



## EU28 – All wheat exports and imports – (July - January) including flour and groats in grain equivalent

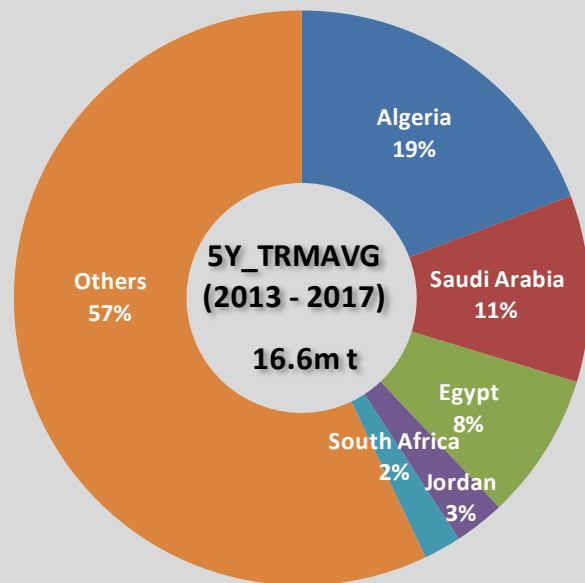


## EU28 – Common wheat exports and imports (July - January) including flour and groats in grain equivalent

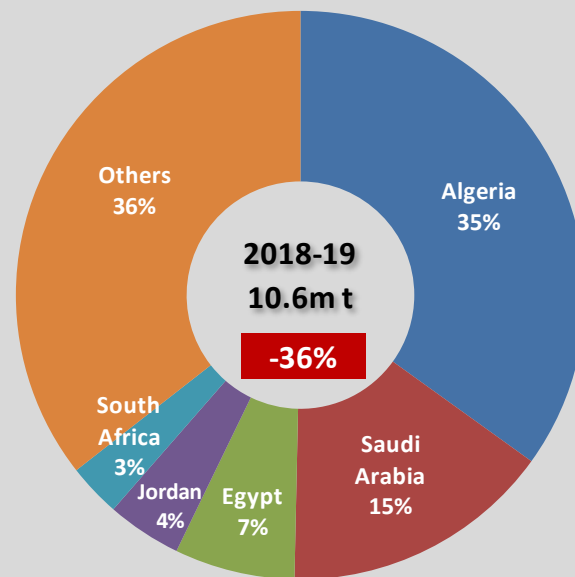




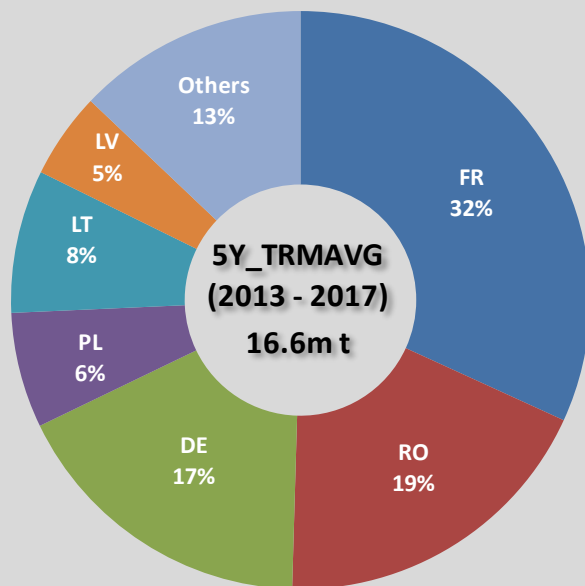
# EU common wheat export destinations (July - January)



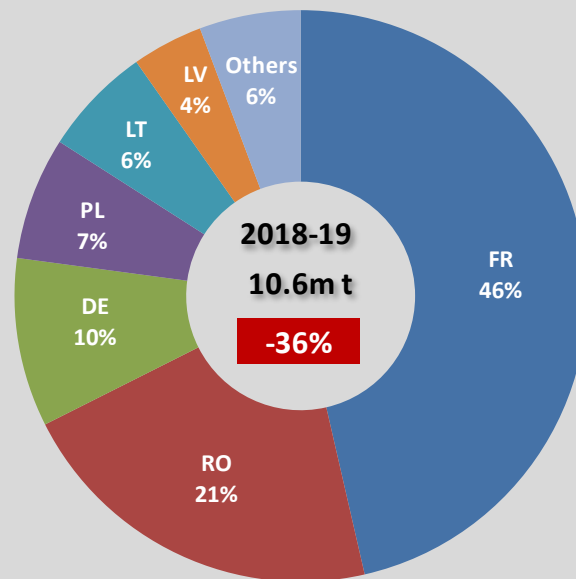
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Algeria	3 186	3 711	↑	16%
Saudi Arabia	1 739	1 636	↓	-6%
Egypt	1 368	726	↓	-47%
Jordan	468	451	↓	-4%
South Africa	348	320	↓	-8%
Others	9 460	3 778	↓	-60%



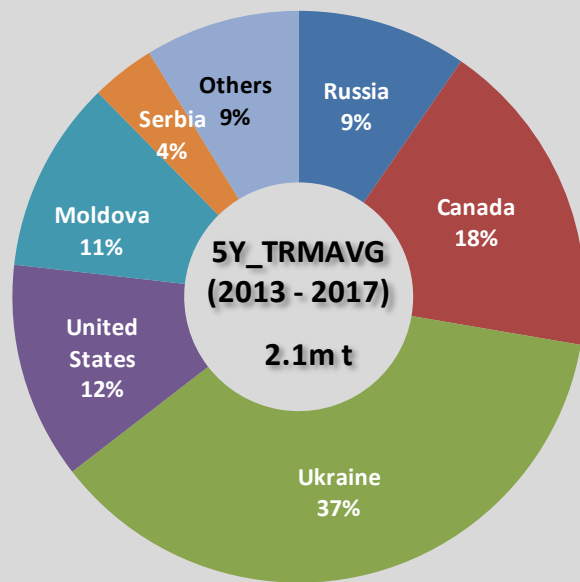
# EU MS exporting common wheat (July - January)



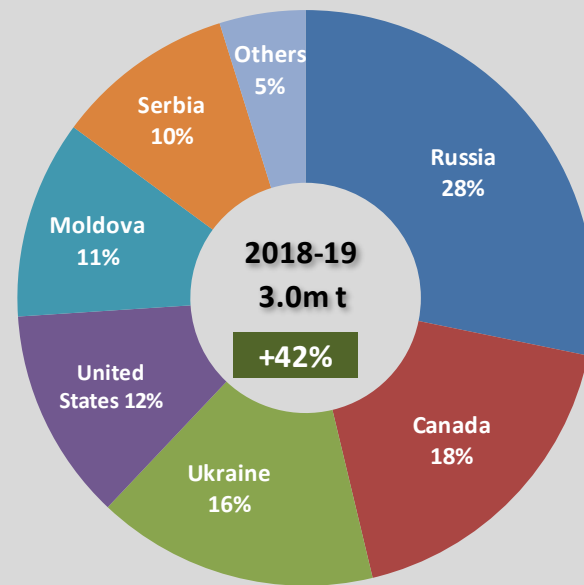
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
FR	5 273	4 930	↓ -7%
RO	3 088	2 249	↓ -27%
DE	2 879	1 014	↓ -65%
PL	1 070	737	↓ -31%
LT	1 326	659	↓ -50%
LV	795	426	↓ -46%
Others	2 138	608	↓ -72%



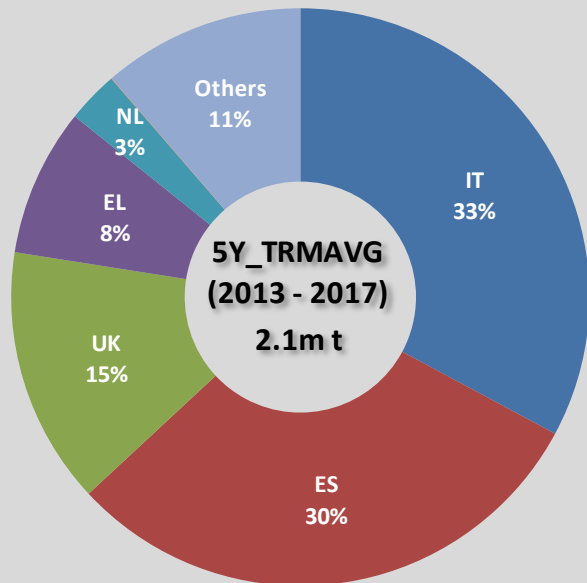
## EU common wheat import origins (July - January)



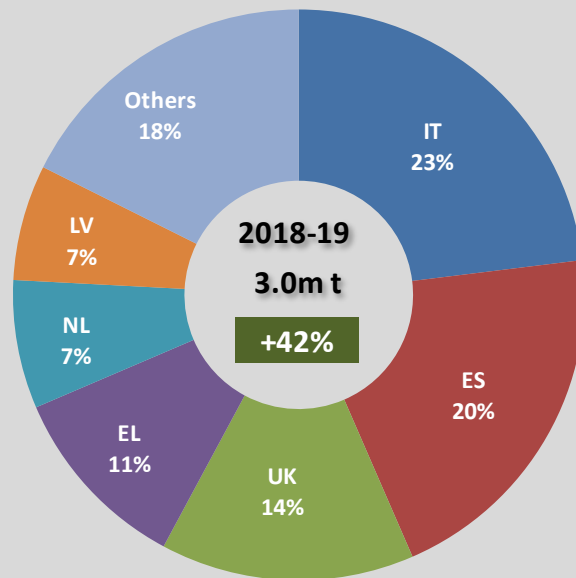
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Russia	205	854	↑	317%
Canada	385	547	↑	42%
Ukraine	785	478	↓	-39%
United States	261	361	↑	38%
Moldova	231	337	↑	46%
Serbia	77	305	↑	297%
Others	186	146	↓	-22%



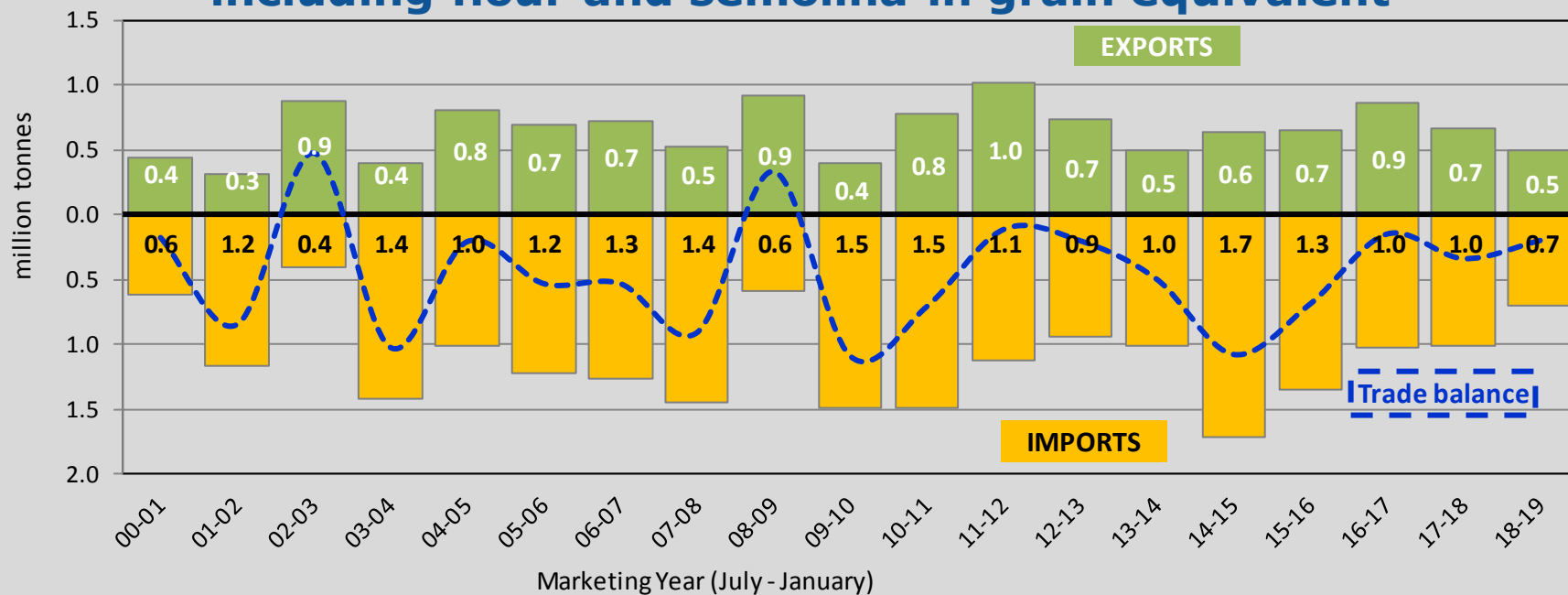
# EU MS importing common wheat (July - January)



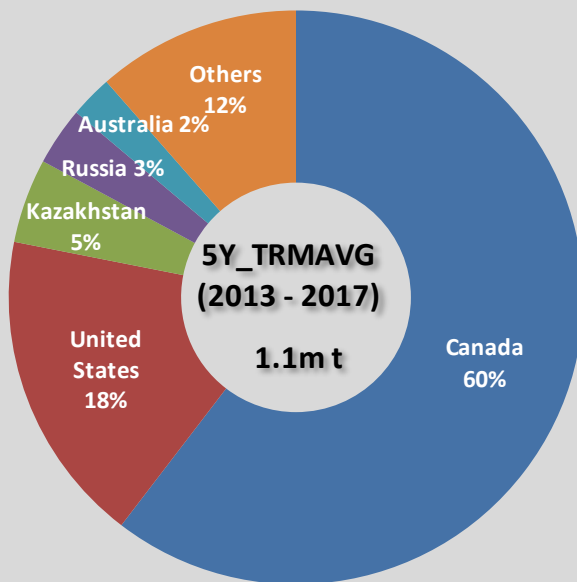
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
IT	700	698	0%
ES	644	619	-4%
UK	307	435	42%
EL	176	325	84%
NL	62	220	257%
LV	1	198	
Others	241	534	121%



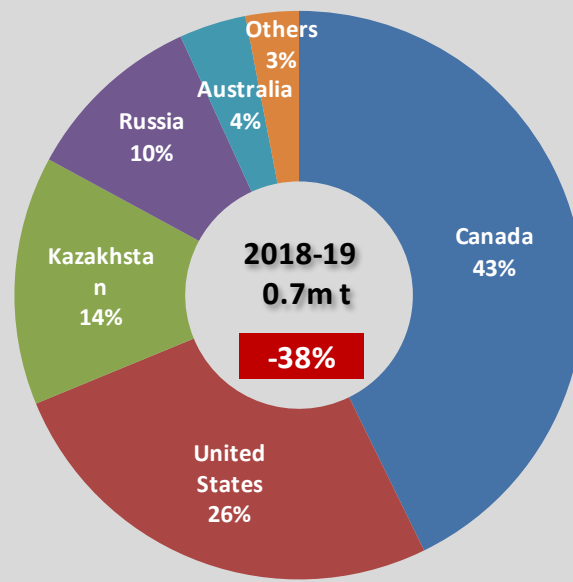
## EU28 – Durum wheat exports and imports – (July - January) including flour and semolina in grain equivalent



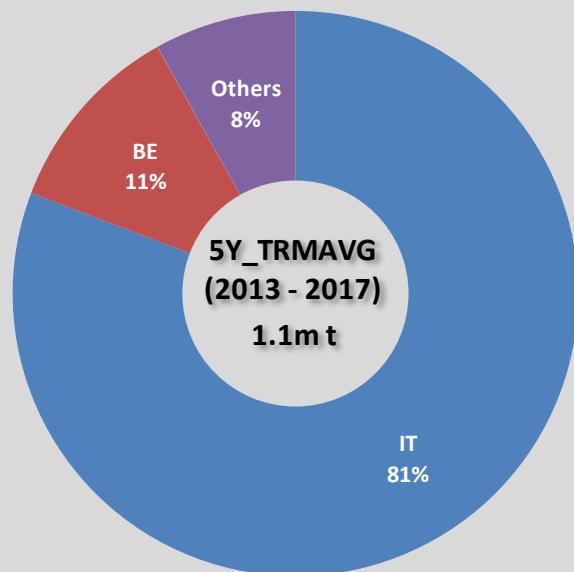
# EU durum wheat import origins (July - January)



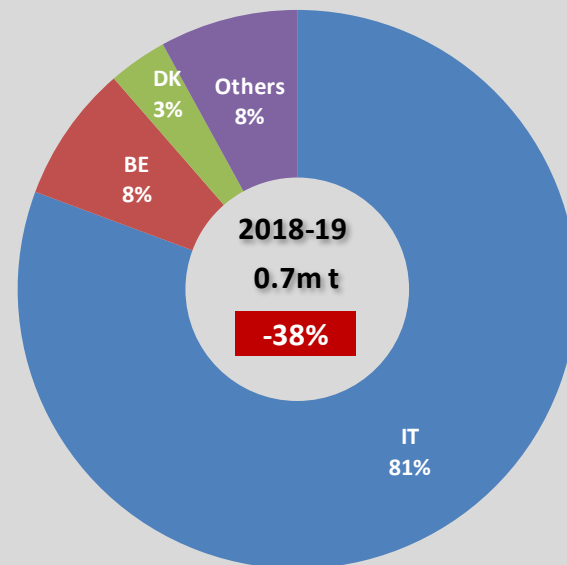
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Canada	678	296	↓	-56%
United States	199	180	↓	-9%
Kazakhstan	53	98	↑	84%
Russia	37	71	↑	93%
Australia	27	26	↓	-1%
Others	129	21	↓	-84%



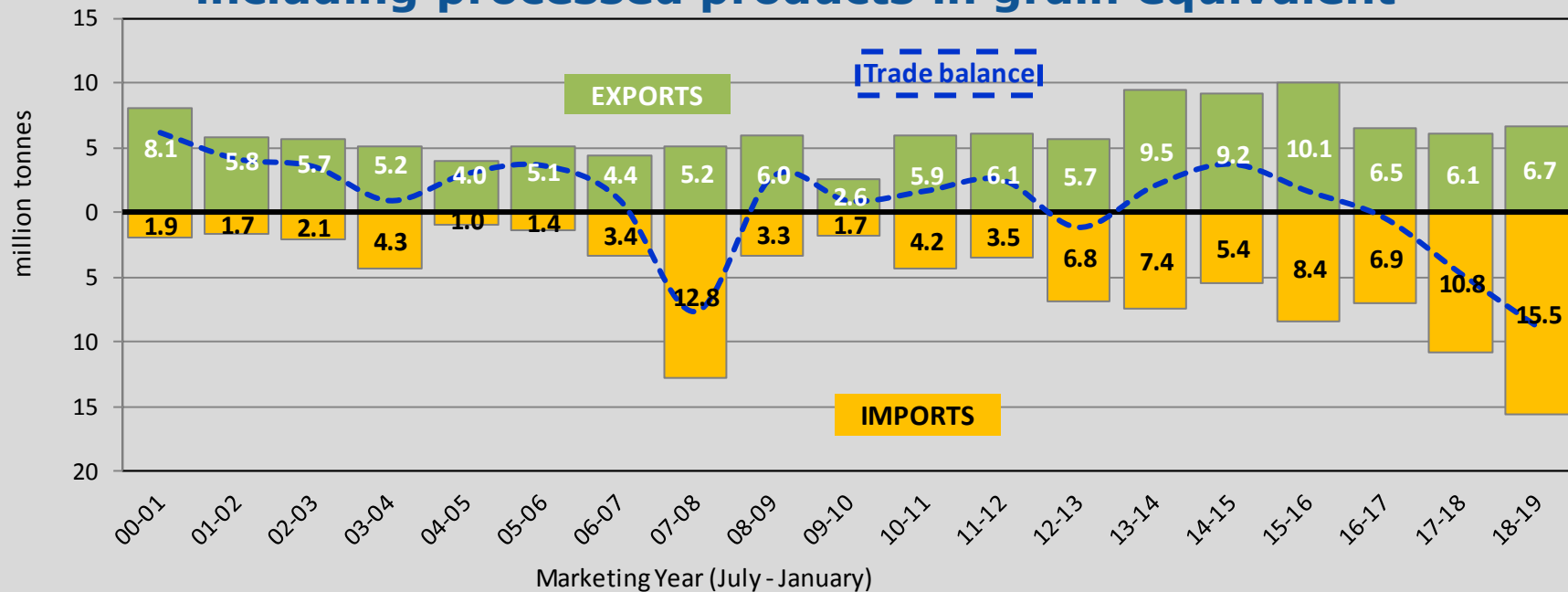
## EU MS importing durum wheat (July - January)



(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
IT	906	559 ↓	-38%
BE	124	55 ↓	-56%
DK	0	24 ↑	
Others	91	55 ↓	-39%

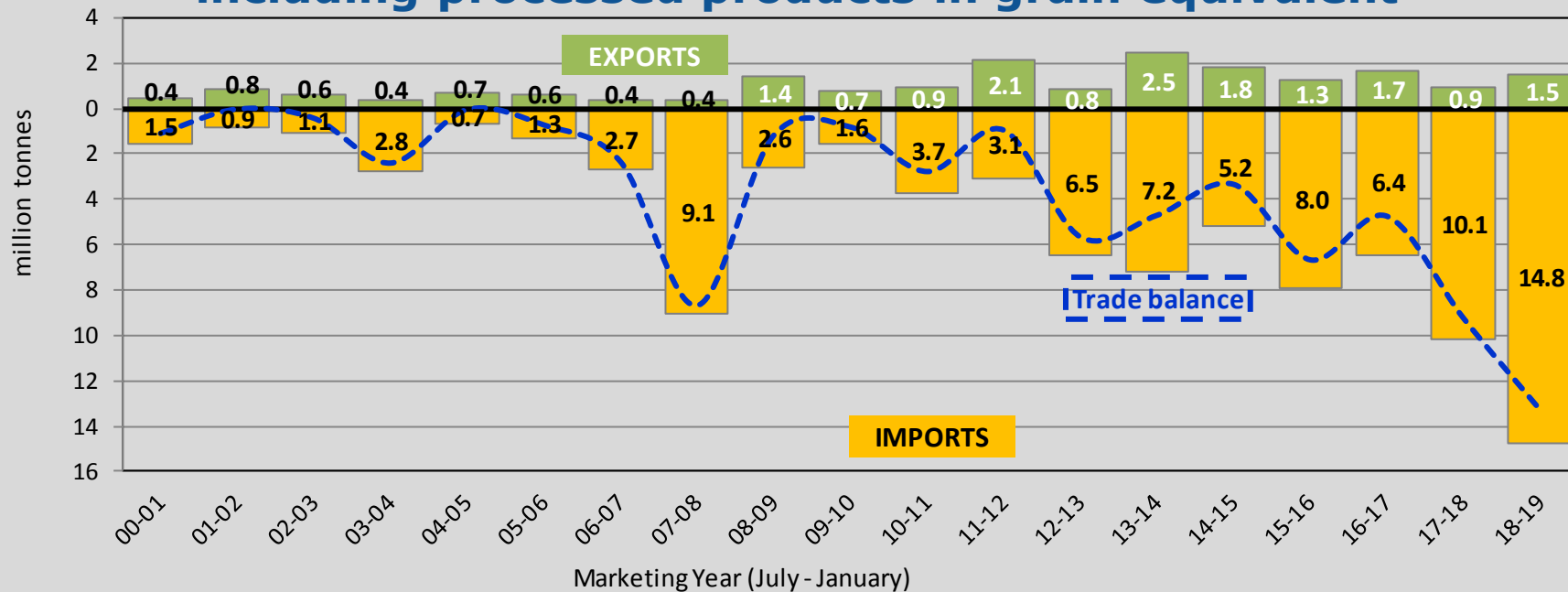


## EU28 – Coarse grain exports and imports – (July - January) including processed products in grain equivalent

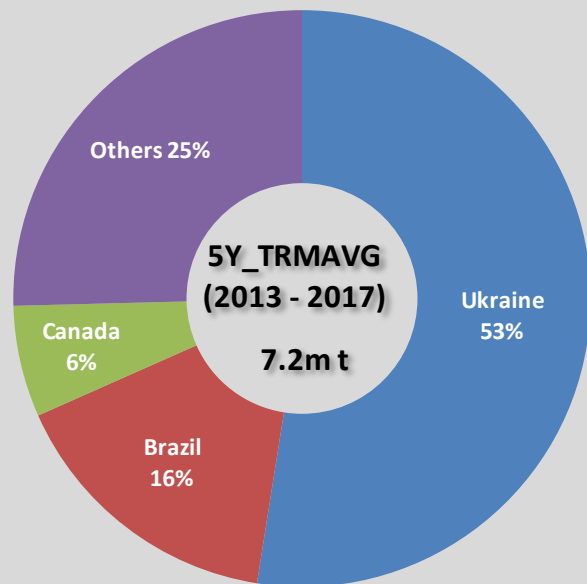




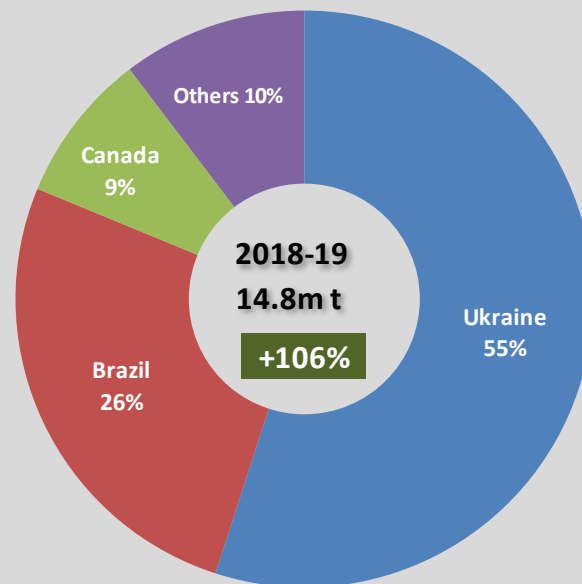
## EU28 – Maize exports and imports – (July - January) including processed products in grain equivalent



# EU maize import origins (July - January)

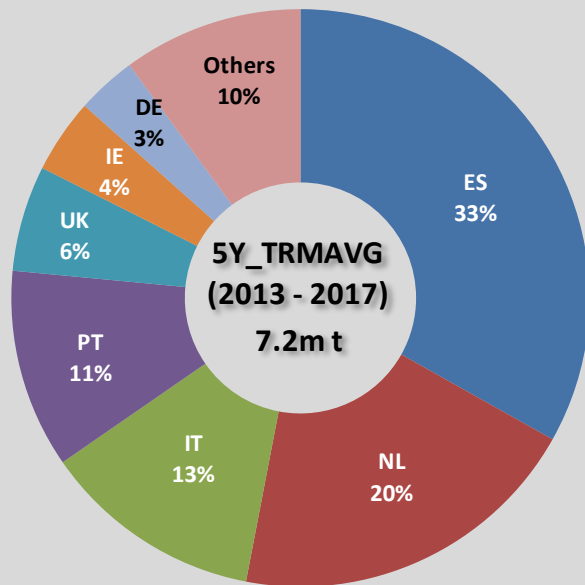


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
Ukraine	3 770	8 133	↑ 116%
Brazil	1 139	3 884	↑ 241%
Canada	449	1 246	↑ 178%
Others	1 825	1 529	↓ -16%

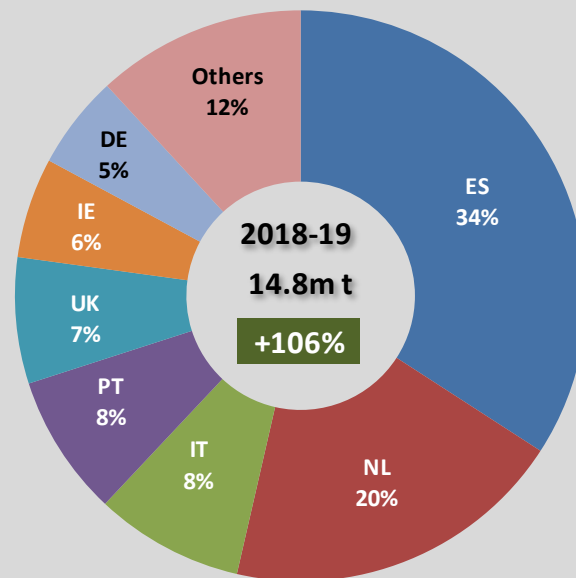


Source: Eurostat- Comext @ 25 Mar 2019

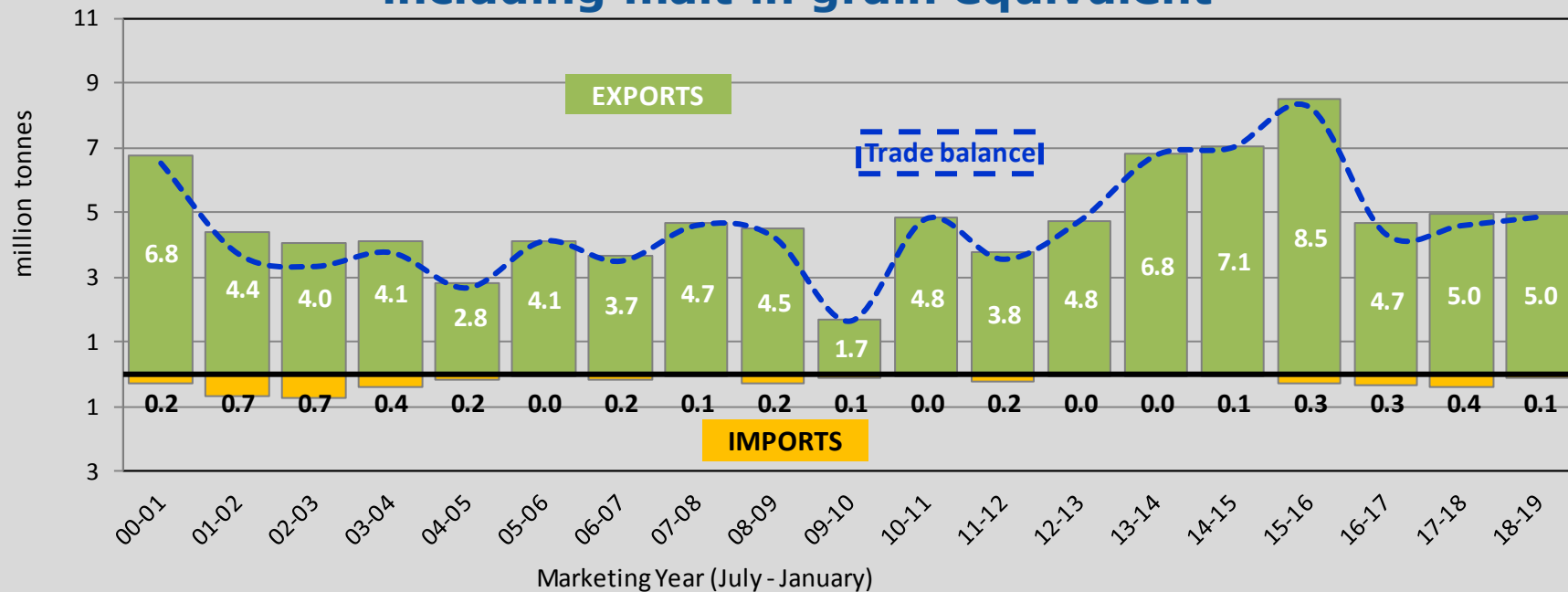
## EU MS importing maize (July - January)



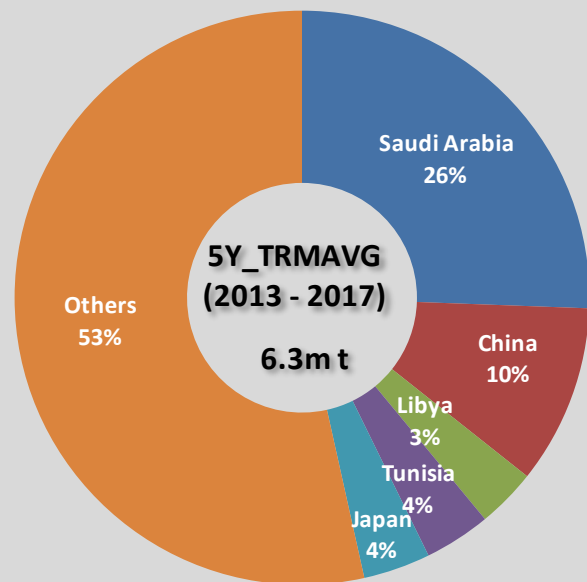
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
ES	2 380	5 050	↑ 112%
NL	1 428	2 876	↑ 101%
IT	887	1 245	↑ 40%
PT	800	1 187	↑ 48%
UK	425	1 057	↑ 149%
IE	299	841	↑ 181%
DE	240	784	↑ 227%
Others	723	1 752	↑ 142%



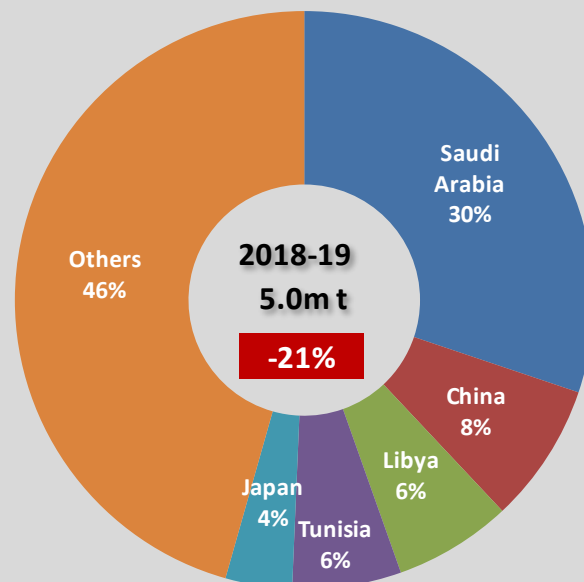
## EU28 – Barley exports and imports – (July - January) including malt in grain equivalent



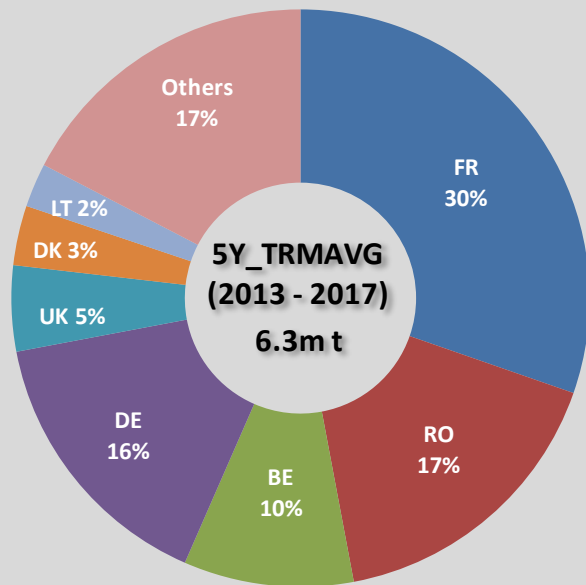
# EU barley export destinations (July - January)



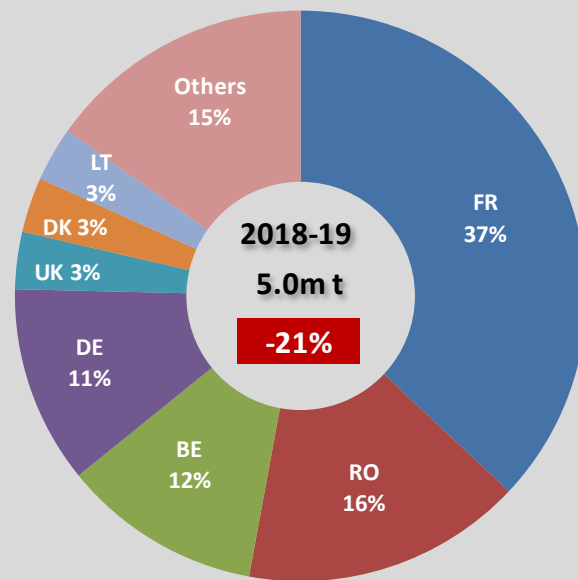
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Saudi Arabia	1 609	1 505	↓	-6%
China	634	391	↓	-38%
Libya	210	328	↑	56%
Tunisia	235	304	↑	30%
Japan	237	186	↓	-22%
Others	3 362	2 276	↓	-32%



## EU MS exporting barley (July - January)



(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
FR	1 907	1 847	↓ -3%
RO	1 051	793	↓ -25%
BE	598	562	↓ -6%
DE	973	559	↓ -42%
UK	302	162	↓ -46%
DK	210	156	↓ -26%
LT	155	154	→ 0%
Others	1 092	757	↓ -31%





## EU Cereals Trade

EU imports of Russian wheat increased this season, what are the main outlets (feed, food...)?

Risks for Russia taking over more EU traditional exports markets for wheat (Algeria...)?

The EU maize imports just breached last year record, what are the prospects for the next season?



# Oilseeds



# EU 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	6.96	<b>6.24</b>	-10.4%	-6.5%
Sunflower	4.20	4.15	<b>4.18</b>	0.7%	-0.6%
Soya Beans	0.90	0.97	<b>0.98</b>	0.1%	8.9%
<b>TOTAL</b>	<b>11.77</b>	<b>12.08</b>	<b>11.39</b>	<b>-6%</b>	<b>-3%</b>

## EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2018/19	2019/20 March	%change 2018/19	%change AVG 5yrs
Rapeseed	21.31	19.86	<b>19.86</b>	0.0%	-6.8%
Sunflower	9.41	10.22	<b>10.08</b>	-1.4%	7.1%
Soya Beans	2.51	2.87	<b>2.87</b>	-0.1%	14.3%
<b>TOTAL</b>	<b>32.88</b>	<b>32.95</b>	<b>32.80</b>	<b>-0.4%</b>	<b>-1.3%</b>

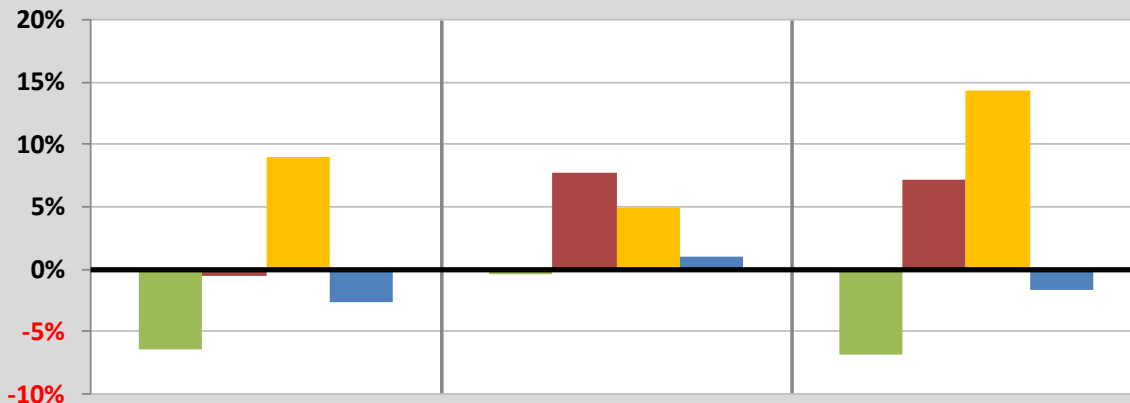
Sources : EC - DG AGRI

# EU oilseeds production

## 2019/20 forecast: 32.8 million tonnes

2019/20 vs 5 year-trimmed average

Area                      Yield                      Production



- lower area (except soya beans)
- higher yields (except rapeseed)
- lower production (except sunflower and soya beans)

Rapeseed

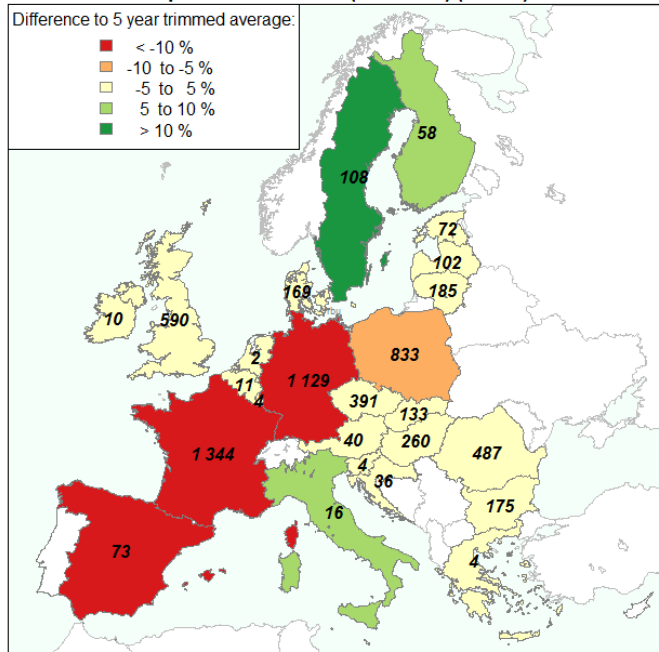
Sunflower

Soya beans

Oilseeds

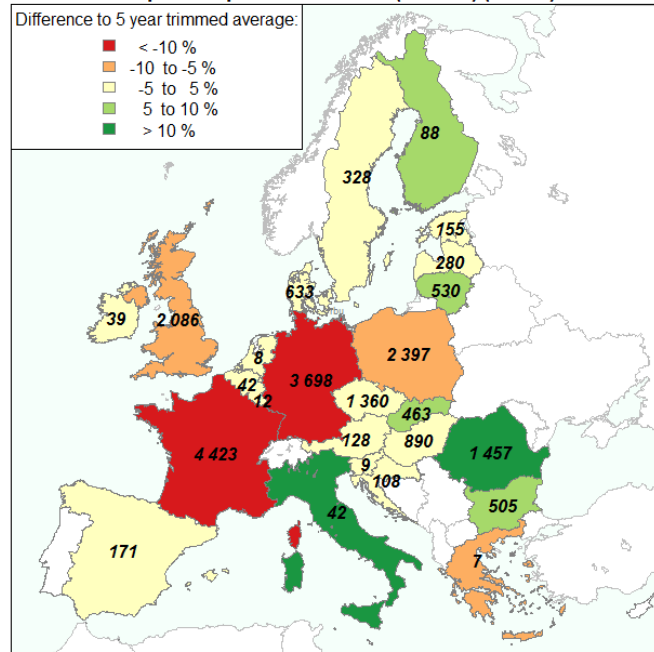
# EU Rapeseed

**Rapeseed area 2019 ( 1000 ha ) (f'cast.)**



Calculations and cartography: European Commission DG AGRI 04 2019.03.19 © EuroGeographics for the administrative boundaries

**Rapeseed production 2019 ( 1000 t ) (f'cast.)**



Calculations and cartography: European Commission DG AGRI 04 2019.03.19 © EuroGeographics for the administrative boundaries

# EU Rapeseed: MS

Production Million tonnes	AVG 5 yrs trimmed	2018/19	2019/20 March	change year on year	%change 5yrs trimmed
<b>TOTAL EU</b>	<b>21.31</b>	<b>19.86</b>	<b>19.86</b>	<b>0%</b>	<b>-7%</b>
France	5.21	4.95	<b>4.42</b>	-11%	-15%
Germany	4.62	3.68	<b>3.70</b>	1%	-20%
Poland	2.54	2.16	<b>2.40</b>	11%	-6%
UK	2.23	2.05	<b>2.09</b>	2%	-6%
Czech Republic	1.33	1.38	<b>1.36</b>	-2%	2%
Romania	1.29	1.51	<b>1.46</b>	-4%	13%
Others	4.09	4.12	<b>4.44</b>	8%	9%

Sources : DG AGRI G.4

# EU Oilseeds Balance Sheet

Thousand metric tonnes

OILSEED	2018/19 est				2019/20 fc			
LAST UPDATED: 28/03/2019	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
<b>Beginning stocks</b>	<b>1 061</b>	<b>1 322</b>	<b>656</b>	<b>3 039</b>	<b>1 065</b>	<b>1 296</b>	<b>641</b>	<b>3 002</b>
Usable production	19 864	2 867	10 219	32 950	19 859	2 865	10 080	32 804
<i>Area (thousand ha)</i>	<i>6 961</i>	<i>975</i>	<i>4 147</i>	<i>12 082</i>	<i>6 235</i>	<i>976</i>	<i>4 177</i>	<i>11 388</i>
<i>Yield (tonnes/ha)</i>	<i>2.9</i>	<i>2.9</i>	<i>2.5</i>	<i>2.7</i>	<i>3.2</i>	<i>2.9</i>	<i>2.4</i>	<i>2.9</i>
Imports (from third countries)	4 600	15 500	500	20 600	3 906	15 000	488	19 395
<b>Total supply</b>	<b>25 525</b>	<b>19 689</b>	<b>11 374</b>	<b>56 589</b>	<b>24 830</b>	<b>19 162</b>	<b>11 209</b>	<b>55 201</b>
Domestic use	24 360	18 203	10 334	52 897	23 512	17 705	10 095	51 313
<i>of which crushing</i>	<i>23 490</i>	<i>16 255</i>	<i>9 194</i>	<i>48 939</i>	<i>22 686</i>	<i>15 221</i>	<i>8 343</i>	<i>46 250</i>
Exports (to third countries)	100	190	400	690	264	178	460	902
<b>Total use</b>	<b>24 460</b>	<b>18 393</b>	<b>10 734</b>	<b>53 587</b>	<b>23 777</b>	<b>17 883</b>	<b>10 555</b>	<b>52 215</b>
<b>Ending stocks</b>	<b>1 065</b>	<b>1 296</b>	<b>641</b>	<b>3 002</b>	<b>1 053</b>	<b>1 278</b>	<b>654</b>	<b>2 986</b>
Change in stocks	4	-26	-15	-37	-12	-18	14	-16

# EU Oilmeal Balance Sheet

Thousand metric tonnes

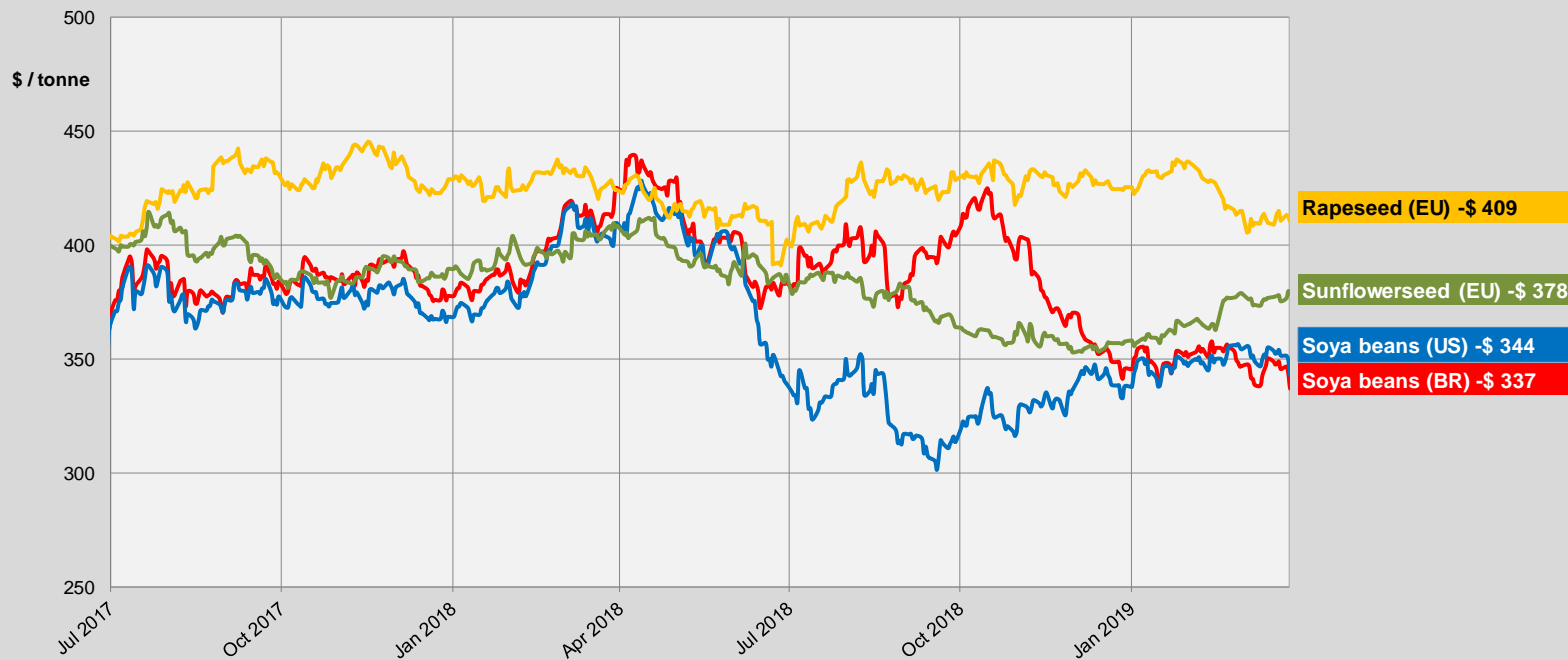
OILSEED MEAL	2018/19 est				2019/20 fc			
LAST UPDATED: 28/03/2019	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
<b>Beginning stocks</b>	<b>50</b>	<b>344</b>	<b>100</b>	<b>494</b>	<b>50</b>	<b>343</b>	<b>100</b>	<b>493</b>
Usable production	13 389	12 841	5 057	31 287	12 931	12 024	4 589	29 544
Imports (from third countries)	500	18 700	3 400	22 600	360	18 700	3 428	22 489
<b>Total supply</b>	<b>13 939</b>	<b>31 886</b>	<b>8 557</b>	<b>54 382</b>	<b>13 341</b>	<b>31 067</b>	<b>8 117</b>	<b>52 525</b>
Domestic use	13 489	31 143	8 164	52 797	12 846	30 385	7 739	50 970
Exports (to third countries)	400	400	292	1 092	444	342	278	1 065
<b>Total use</b>	<b>13 889</b>	<b>31 543</b>	<b>8 457</b>	<b>53 889</b>	<b>13 291</b>	<b>30 727</b>	<b>8 017</b>	<b>52 035</b>
<b>Ending stocks</b>	<b>50</b>	<b>343</b>	<b>100</b>	<b>493</b>	<b>50</b>	<b>340</b>	<b>100</b>	<b>490</b>
Change in stocks	-	-2	-	-2	-	-2	-	-2

# EU Vegetable Oils Balance Sheet

Thousand metric tonnes

VEGETABLE OILS	2018/19 est					2019/20 fc				
LAST UPDATED: 28/03/2019	Rapeseed	Soybean	Sunflower	Palm	TOTAL	Rapeseed	Soybean	Sunflower	Palm	TOTAL
<b>Beginning stocks</b>	<b>592</b>	<b>175</b>	<b>269</b>	<b>492</b>	<b>1 528</b>	<b>589</b>	<b>175</b>	<b>268</b>	<b>489</b>	<b>1 520</b>
Usable production	9 631	3 251	3 862	0	16 743	9 301	3 044	3 504	0	15 849
Imports (from third countries)	300	295	1 430	6 993	9 018	209	292	1 487	7 012	9 001
<b>Total supply</b>	<b>10 522</b>	<b>3 721</b>	<b>5 561</b>	<b>7 485</b>	<b>27 289</b>	<b>10 099</b>	<b>3 511</b>	<b>5 259</b>	<b>7 501</b>	<b>26 371</b>
Domestic use	9 595	2 659	4 865	6 853	23 972	9 161	2 430	4 552	6 870	23 012
Exports (to third countries)	339	887	428	143	1 796	345	906	434	146	1 831
<b>Total use</b>	<b>9 934</b>	<b>3 546</b>	<b>5 293</b>	<b>6 996</b>	<b>25 769</b>	<b>9 506</b>	<b>3 336</b>	<b>4 986</b>	<b>7 016</b>	<b>24 843</b>
<b>Ending stocks</b>	<b>589</b>	<b>175</b>	<b>268</b>	<b>489</b>	<b>1 520</b>	<b>594</b>	<b>175</b>	<b>273</b>	<b>485</b>	<b>1 527</b>
Change in stocks	-3	-	-2	-3	-7	5	-	6	-4	7

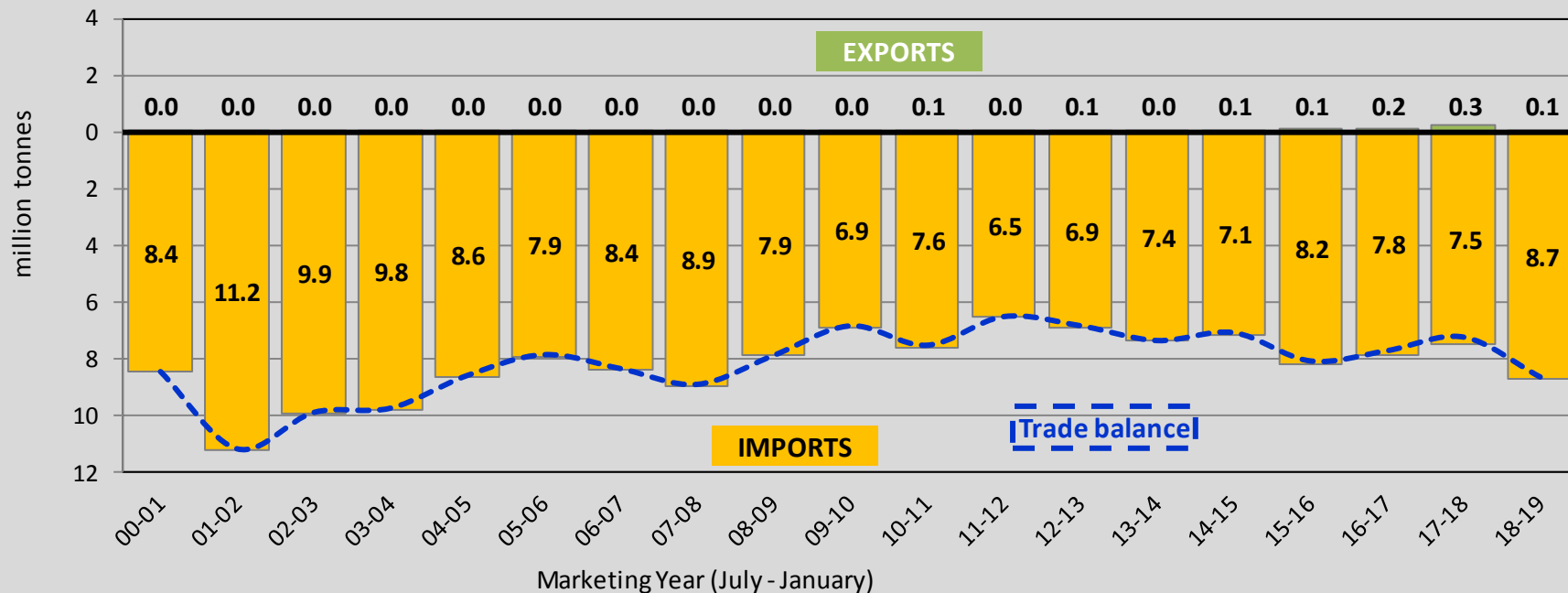
# Oilseeds FOB export prices



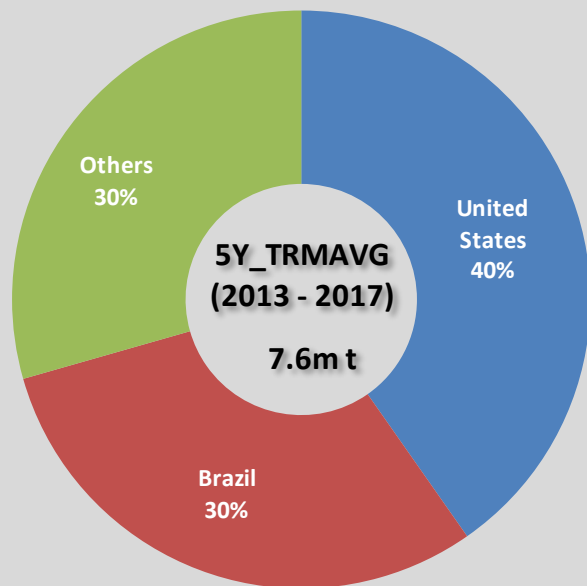
Source: IGC



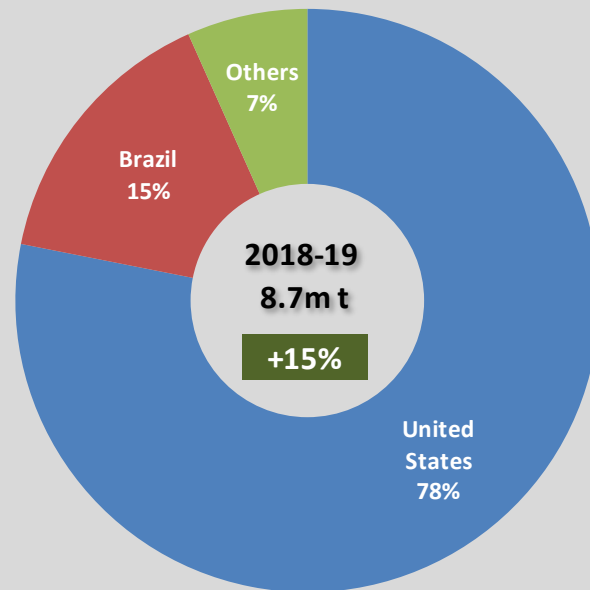
## EU28 – Soya bean exports and imports (July - January)



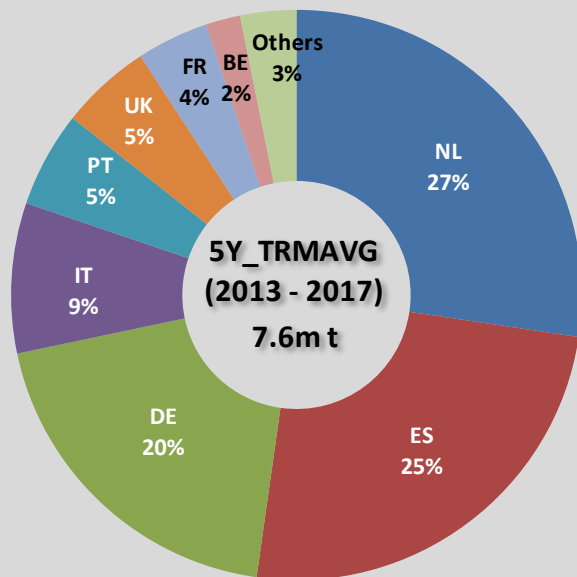
# EU soya beans import origins (July - January)



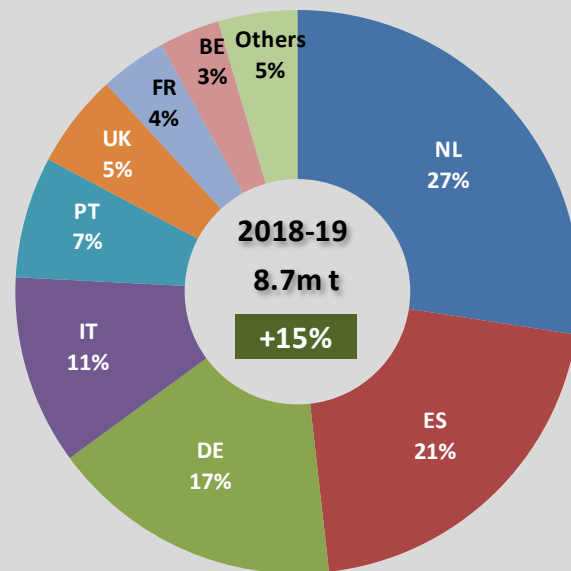
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
United States	3 048	6 797	↑	123%
Brazil	2 292	1 323	↓	-42%
Others	2 227	582	↓	-74%



## EU MS importing soya beans (July - January)



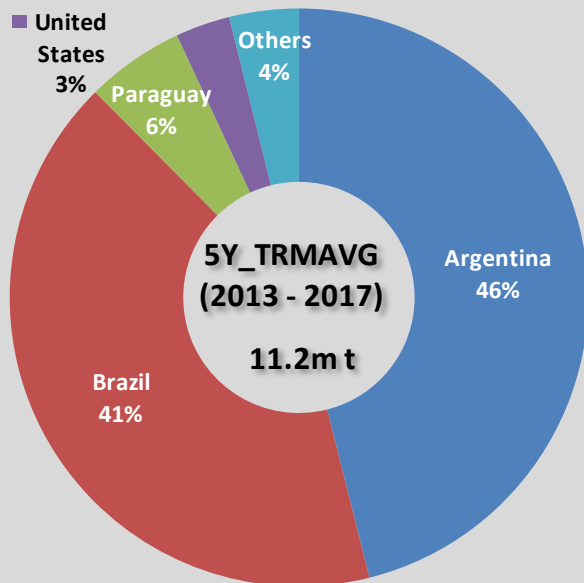
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
NL	2 070	2 387	↑ 15%
ES	1 882	1 808	↓ -4%
DE	1 473	1 456	↓ -1%
IT	644	946	↑ 47%
PT	411	606	↑ 47%
UK	390	469	↑ 20%
FR	308	332	↑ 8%
BE	148	302	↑ 104%
Others	240	395	↑ 64%



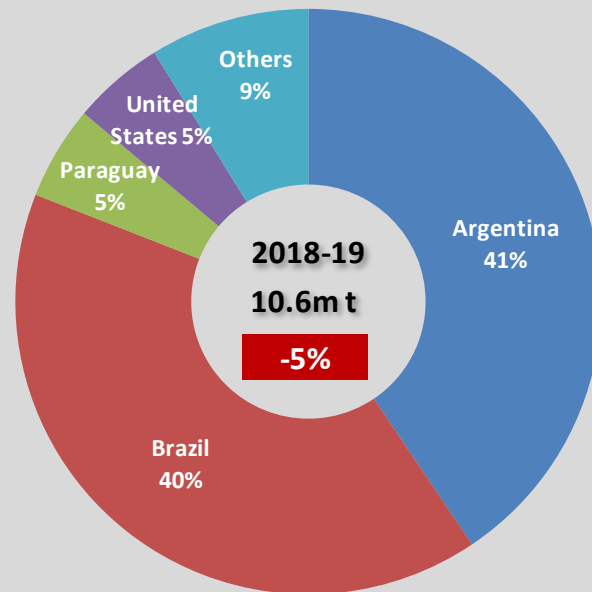
## EU28 – Soya meal exports and imports (July - January)



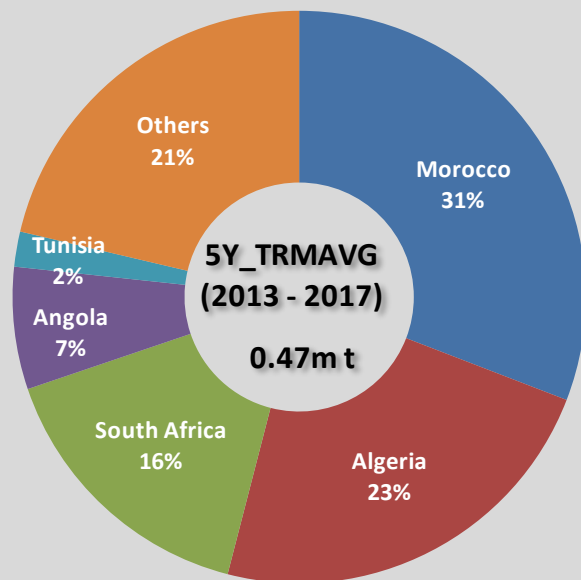
# EU soya meal import origins (July - January)



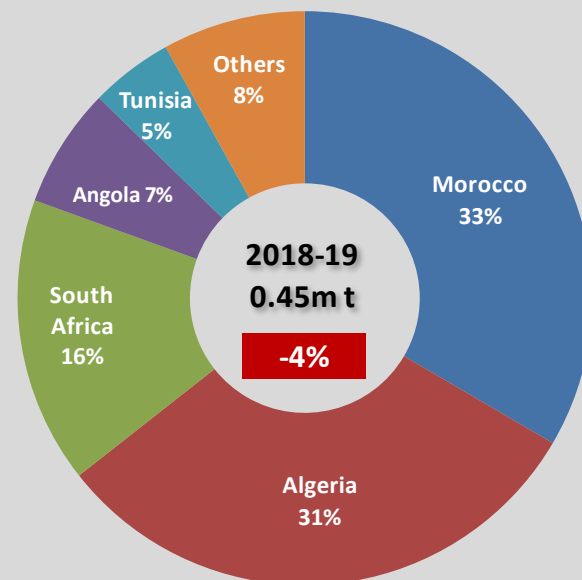
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Argentina	5 160	4 306	↓	-17%
Brazil	4 646	4 285	↓	-8%
Paraguay	617	549	↓	-11%
United States	341	538	↑	58%
Others	435	936	↑	115%



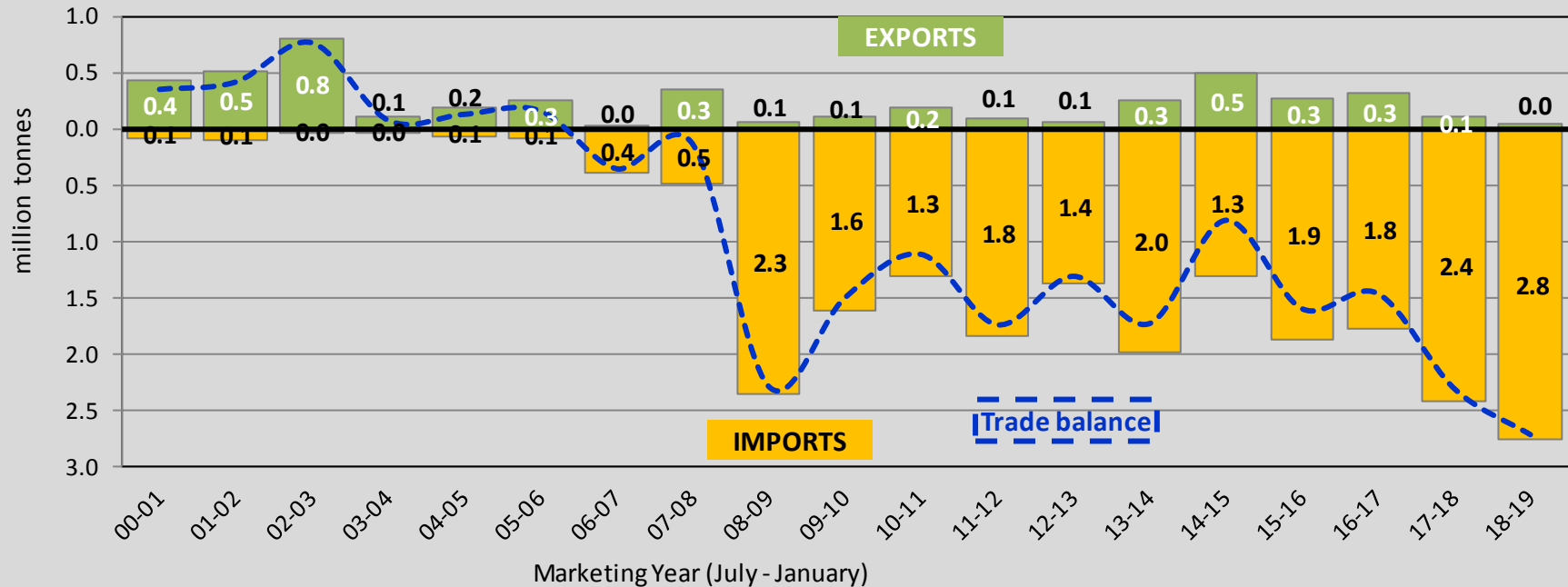
# EU soya oil export destinations (July - January)



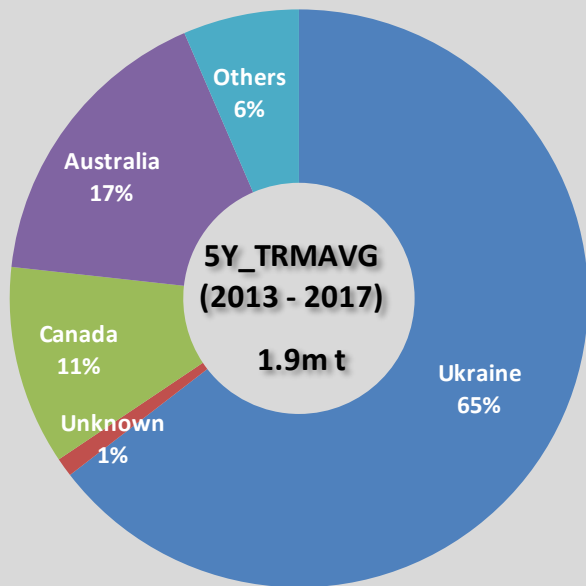
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Morocco	145	151	↑	4%
Algeria	109	140	↑	29%
South Africa	74	73	↓	-1%
Angola	32	31	↓	-6%
Tunisia	9	21	↑	127%
Others	100	36	↓	-



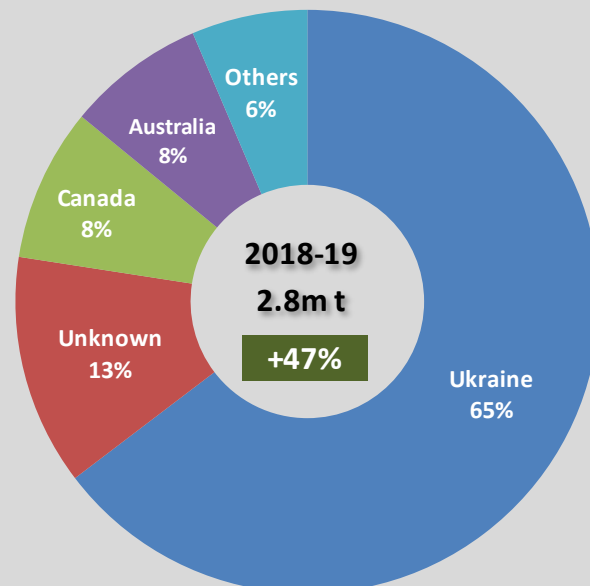
## EU28 – Rapeseed exports and imports (July - January)



# EU rapeseed import origins (July - January)

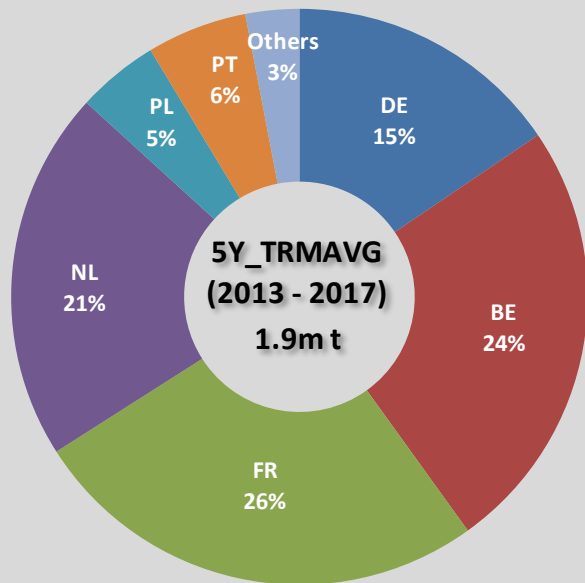


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
Ukraine	1 208	1 780	↑ 47%
Unknown	20	353	↑
Canada	209	234	↑ 12%
Australia	314	211	↓ -33%
Others	121	177	↑ 46%

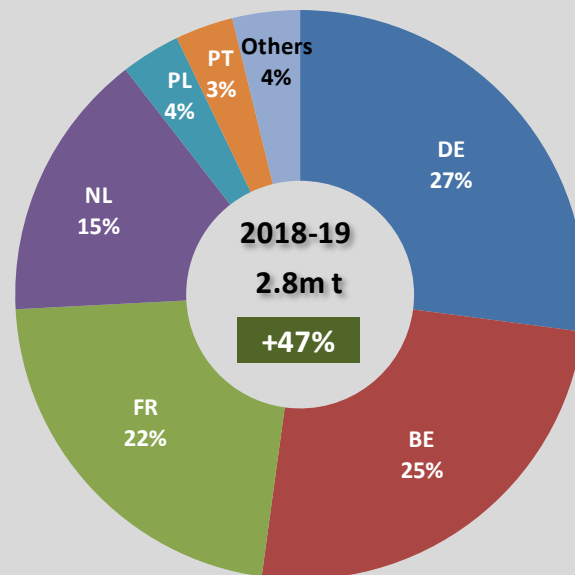




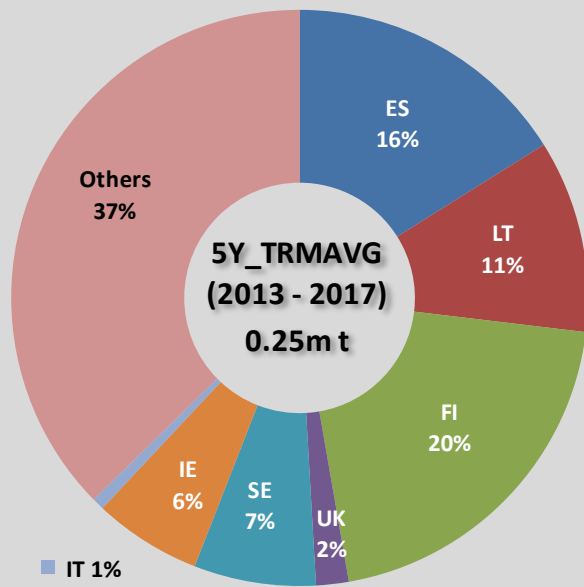
## EU MS importing rapeseed (July - January)



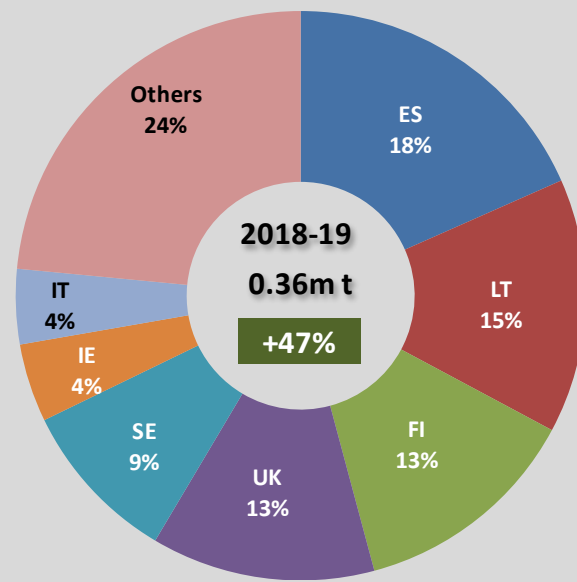
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
DE	290	746	↑ 157%
BE	460	690	↑ 50%
FR	485	607	↑ 25%
NL	390	422	↑ 8%
PL	86	93	↑ 8%
PT	105	91	↓ -14%
Others	56	106	↑ 87%



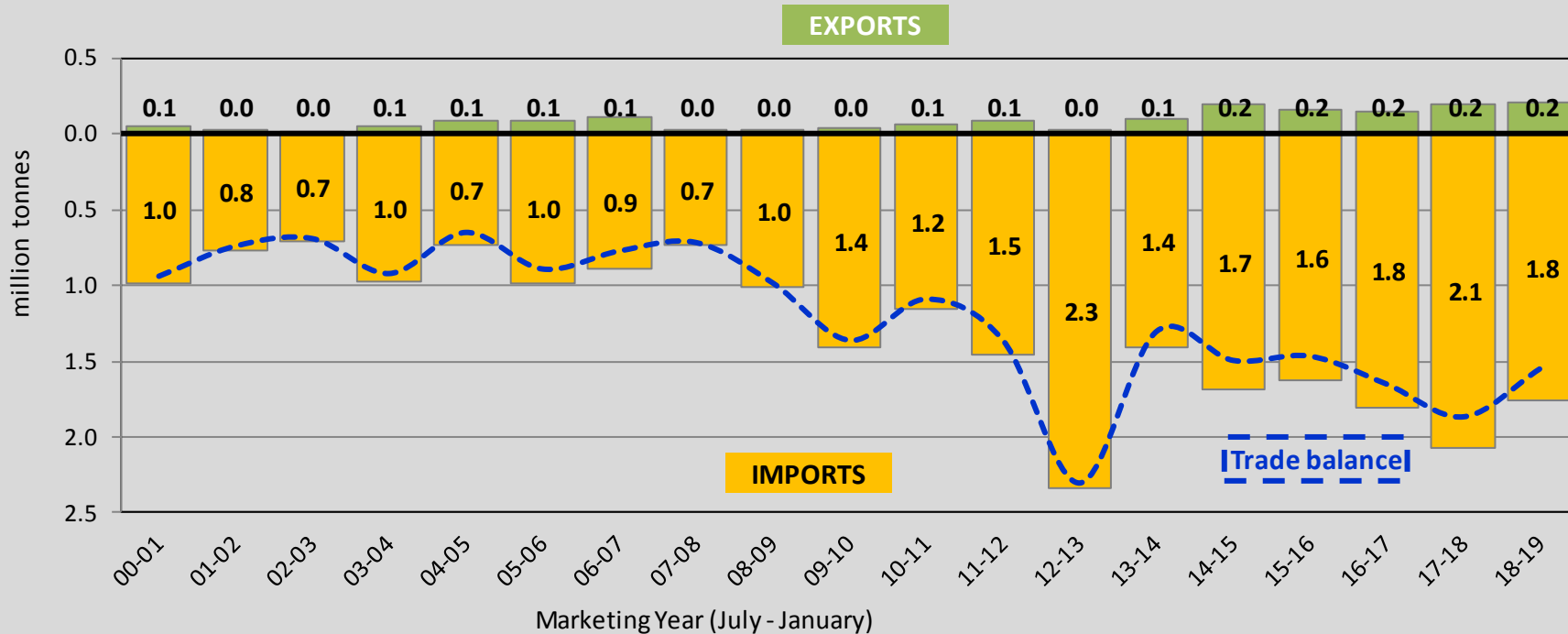
## EU MS importing rapeseed meal (July - January)



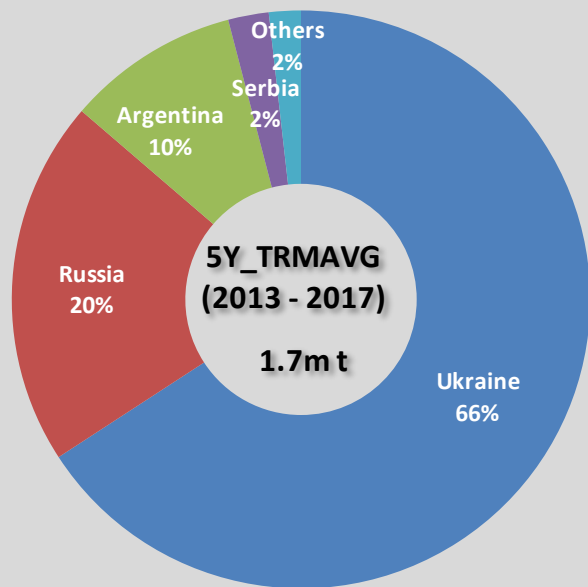
	5Y_TRMAVG (2013 - 2017)	2018-19
(Thousand t)		
ES	40	67 <span>↑</span> 67%
LT	27	52 <span>↑</span> 96%
FI	50	47 <span>↓</span> -6%
UK	5	46 <span>↑</span> 917%
SE	17	34 <span>↑</span> 99%
IE	15	16 <span>↑</span> 8%
IT	2	15 <span>↑</span> 814%
Others	92	85 <span>↓</span> -8%



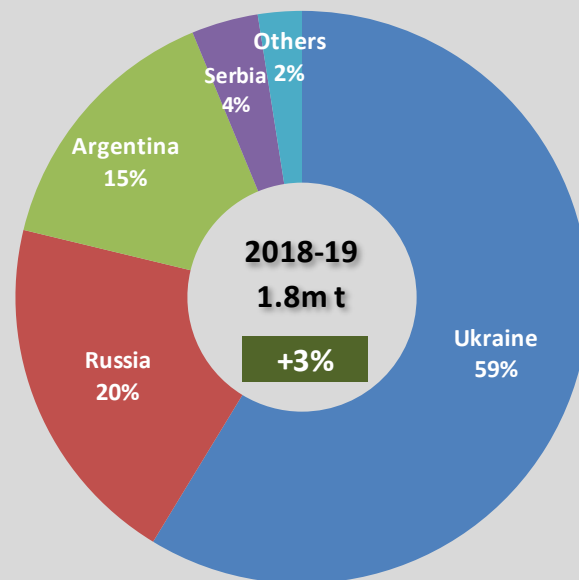
## EU28 – Sunflower meal exports and imports (July - January)



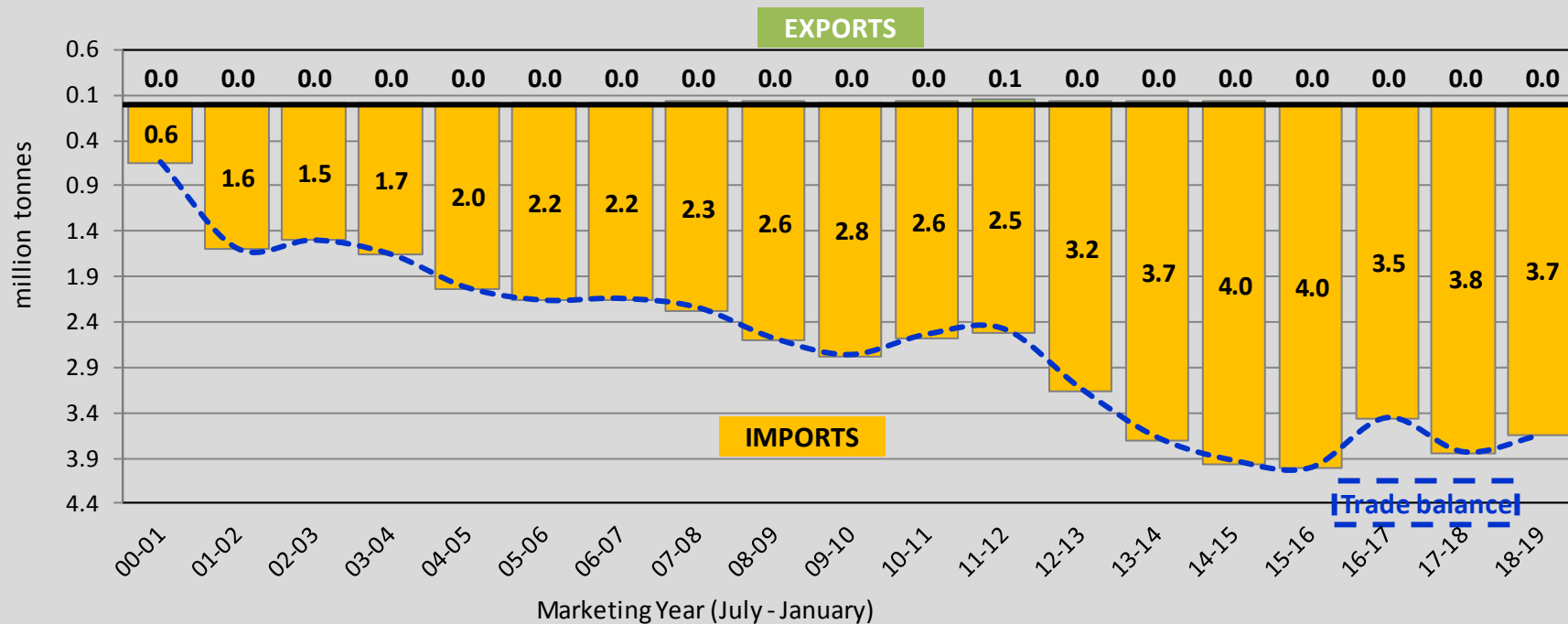
# EU sunflowerseed meal import origins (July - January)



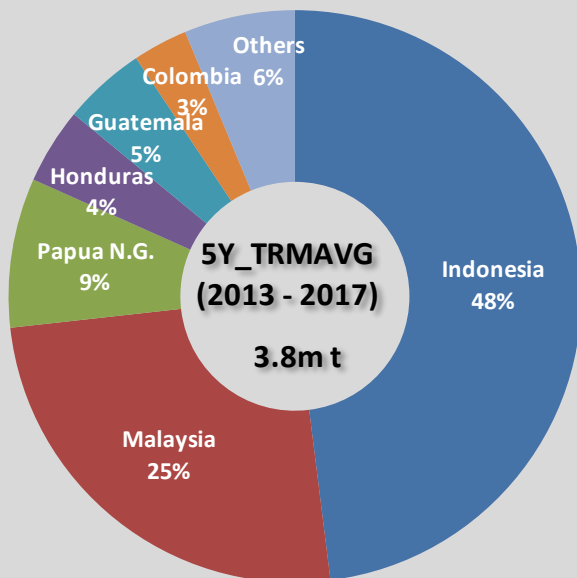
(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Ukraine	1 123	1 033	↓	-8%
Russia	350	353	↑	1%
Argentina	165	264	↑	60%
Serbia	39	66	↑	71%
Others	30	44	↑	43%



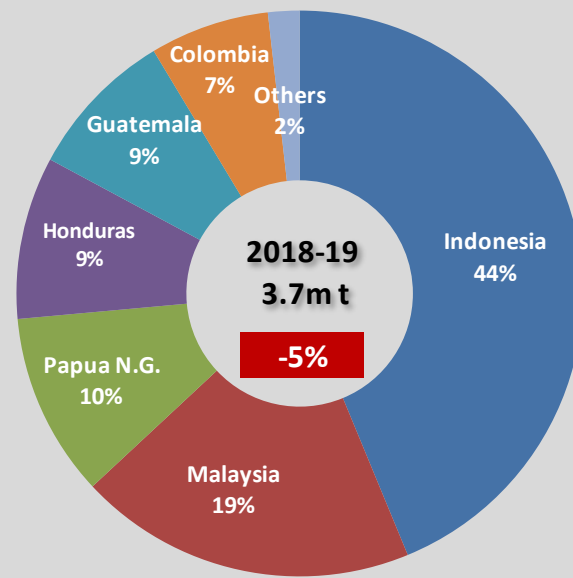
## EU28 – Palm oil exports and imports (July - January)



# EU palm oil import origins (July - January)

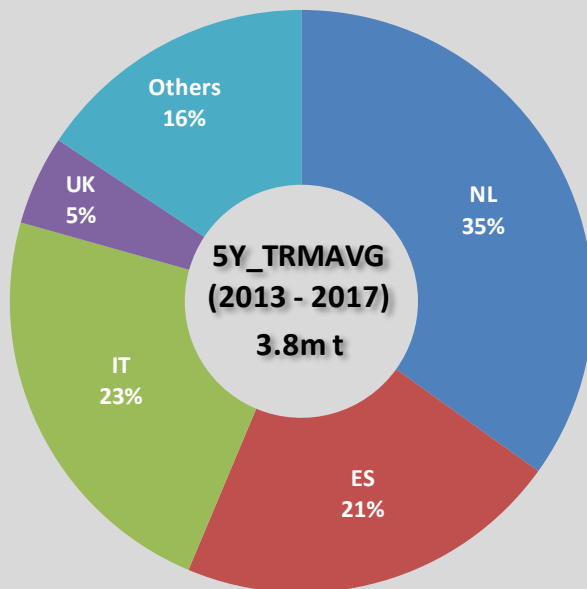


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
Indonesia	1 842	1 600	↓ -13%
Malaysia	968	705	↓ -27%
Papua N.G.	324	384	↑ 19%
Honduras	165	340	↑ 106%
Guatemala	179	312	↑ 74%
Colombia	119	249	↑ 110%
Others	240	66	↓ -73%

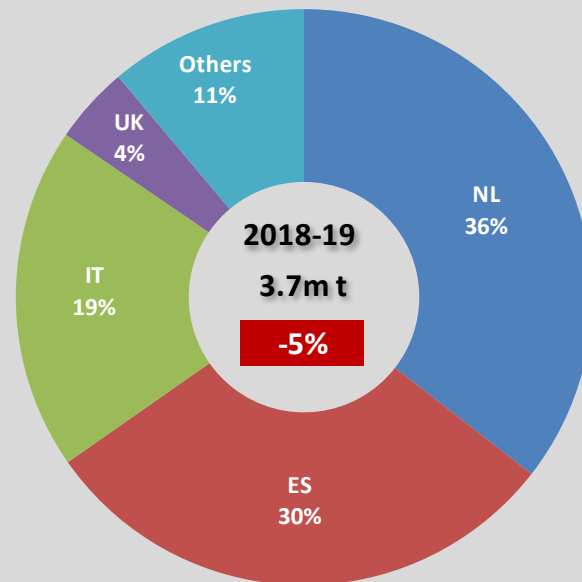


Source: Eurostat- Comext @ 25 Mar 2019

## EU MS importing palm oil (July - January)



(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
NL	1 339	1 298 ↓	-3%
ES	822	1 088 ↑	32%
IT	883	704 ↓	-20%
UK	191	158 ↓	-17%
Others	601	407 ↓	-32%





## EU Oilseeds

What are your expectations on the development of the EU's **soya bean area** ?

How do you see the development of EU **rapeseed imports**?





# Protein crops

# EU 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	0.85	0.90	<b>0.90</b>	0.1%	5.5%
Broad beans	0.64	0.64	<b>0.64</b>	0.1%	0.0%
Sweet lupins	0.16	0.13	<b>0.15</b>	20.0%	-3.0%
<b>TOTAL</b>	<b>1.68</b>	<b>1.66</b>	<b>1.69</b>	<b>2%</b>	<b>1%</b>

## 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	<b>2.28</b>	13.7%	6.8%
Broad beans	1.83	1.62	<b>1.90</b>	17.3%	3.5%
Sweet lupins	0.26	0.18	<b>0.24</b>	34.3%	-8.1%
<b>TOTAL</b>	<b>4.24</b>	<b>3.80</b>	<b>4.41</b>	<b>16.2%</b>	<b>3.9%</b>

Sources : EC - DG AGRI

# EU Protein Crops Balance sheet

	EU-28					
	2014/15	2015/16	2016/17	2017/18e	2018/19f	2019/2020
<b>Production</b>	<b>3 573</b>	<b>5 165</b>	<b>5 459</b>	<b>6 142</b>	<b>4 950</b>	<b>5 534</b>
Field peas	1 394	2 077	2 315	2 766	2 001	2 276
Broad beans	1 248	1 962	1 922	2 173	1 619	1 898
Lentils	51	56	70	66	76	76
Lupins	209	364	297	263	176	236
Chickpeas	58	61	78	132	191	197
Other dry pulses	613	646	776	743	887	851
<b>Total domestic use</b>	<b>4 066</b>	<b>5 058</b>	<b>5 337</b>	<b>6 464</b>	<b>6 819</b>	<b>6 573</b>
Field peas	1 443	1 630	1 716	2 517	3 287	2 751
Broad beans	990	1 487	1 547	1 775	1 093	1 482
Lentils	239	253	299	294	293	289
Lupins	283	453	445	465	450	382
Chickpeas	183	199	214	271	378	350
Other dry pulses	927	1 036	1 115	1 142	1 318	1 318
<b>Imports</b>	<b>1 040</b>	<b>987</b>	<b>1 099</b>	<b>1 504</b>	<b>2 552</b>	<b>1 900</b>
Field peas	165	56	132	427	1 386	907
Broad beans	10	9	10	9	8	9
Lentils	194	200	234	231	221	217
Lupins	74	89	148	202	275	146
Chickpeas	129	146	147	167	198	153
Other dry pulses	469	486	427	467	465	467
<b>Exports</b>	<b>547</b>	<b>1 094</b>	<b>1 221</b>	<b>1 183</b>	<b>683</b>	<b>955</b>
Field peas	115	503	731	677	100	431
Broad beans	267	484	386	407	534	426
Lentils	6	4	5	4	4	4
Lupins	0	0	0	0	0	0
Chickpeas	3	7	11	28	11	10
Other dry pulses	155	96	87	67	34	83
<b>End stocks</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>



# EU Protein Crops

How do you see the developments for **protein crop imports** (especially for peas and lentils)?

What is your opinion on the strong development for **chickpeas production**?

**Thank you for your attention!**

**Market data for cereals, oilseeds and protein  
crops are available at the  
EU Crops Market Observatory .**

**[https://ec.europa.eu/agriculture/market-  
observatory/crops](https://ec.europa.eu/agriculture/market-observatory/crops)**