Crops Market Observatory
Impacts of Ukraine/Russia crisis

4 March 2022

AGRI-E4

EU supply situation

Cereal : EU Cereals Supply & Demand

(thousand metric tonnes)

LAST UPDATED: 24/02/2022

	2021/22 fc									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	8 934	4 534	2 166	20 337	847	1 256	1 242	2 128	353	41 795
Usable production	129 797	51 973	7 720	72 469	7 764	891	7 477	11 534	3 563	293 188
Area (thousand ha)	*21 676*	*10 314*	*2 203*	*9 206*	*1 914*	*174*	*2 567*	*2 662*	*1 241*	*51 956*
Yield (tonnes/ha)	*6*	*5*	*4*	*8*	*4*	*5*	*3*	*4*	*3*	*6*
Imports (from third countries)	2 000	1 000	1 500	14 500	200	20	47	1	161	19 429
Total supply	140 731	57 507	11 386	107 306	8 812	2 167	8 765	13 662	4 077	354 412
Total domestic use	96 132	43 905	9 131	81 546	7 410	1 089	7 297	11 566	3 784	261 860
Human consumption	41 153	363	8 090	4 709	2 963	155	1 101	52	23	58 609
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 400	6 700	95	11 900	1 500		101	445	170	30 310
of which bioethanol/biofuel	*3 400*	*437*		*6 800*	*900*			*344*	*14*	*11 895*
Animal feed	40 200	34 400	500	64 100	2 600	900	5 700	10 500	3 300	162 200
Losses	779	312	46	435	47	5	45	69	21	1 759
Exports (to third countries)	32 000	9 500	800	6 000	200	10	130	4	19	48 663
Total use	128 132	53 405	9 931	87 546	7 610	1 099	7 427	11 570	3 803	310 523
Ending stocks**	12 598	4 102	1 455	19 760	1 202	1 067	1 338	2 092	274	43 888
Change in stocks**	3 665	-432	-711	-577	355	-189	96	-35	-79	2 094

* Marketing year: from July to June

** At the end of the marketing year

Cereals – EU Trade

Cumul of weeks 1 to 35

Customs Surveillance (tonnes)	EU* 01/07/2021 - 27/02/2022 Export	EU* 01/07/2021 - 27/02/2022 Import	EU + UK 01/07/2020 - 28/02/2021 Export	EU + UK 01/07/2020 - 28/02/2021 Import	EU + UK 01/07/2019 - 01/03/2020 Export	EU + UK 01/07/2019 - 01/03/2020 Import
Common wheat	17 890 053	1 698 978	18 241 972	1 567 851	21 478 133	1 558 802
Common wheat flour (grain equivalent)	345 123	154 578	292 818	43 173	385 334	17 738
Durum wheat	608 005	997 865	225 453	1 965 885	600 622	1 345 899
Durum wheat meal (grain equivalent)	149 848	2 162	158 988	1 467	159 654	874
Total Wheat	**18 993 029**	**2 853 583**	**18 919 231**	**3 578 375**	**22 623 743**	**2 923 313**
Barley	5 174 923	593 092	5 315 867	219 203	5 135 908	522 024
Malt (grain equivalent)	1 914 694	17 674	2 050 708	5 586	1 866 822	12 853
Maize	3 713 772	10 961 290	1 645 253	10 998 300	3 473 942	14 826 244
Rye	135 733	194 799	137 907	1 031	195 599	3 240
Oats	82 708	48 908	69 754	4 526	133 745	1 748
Sorghum	8 326	14 201	2 886	10 903	1 127	38 802
Total Coarse grains	**11 030 156**	**11 829 964**	**9 222 374**	**11 239 548**	**10 807 144**	**15 404 910**
General Total	**30 023 185**	**14 683 547**	**28 141 605**	**14 817 924**	**33 430 887**	**18 328 223**

* The United Kingdom is no longer a Member State of the European Union, however until the end of the transition period it was still a part of the EU Customs Union. Due to the absence of intra-trade data in the surveillance system, the totals of the EU trade data therefore also include the UK data until 31/12/2020. The data as of 1/1/2021 is therefore not comparable with the data until 31/12/2020.

European Commission

Cereals – EU Trade

Top 5 import origins* - (update of 28 févr 2022)

Common wheat

Origin	MY 2021/22 tonnes	MY 2021/22 share	MY 2020/21 tonnes	MY 2020/21 share
Russia	354 245	20.9%	250 206	16.0%
Ukraine	321 311	18.9%	577 246	36.8%
Serbia	254 465	15.0%	88 005	5.6%
United Kingdom	221 810	13.1%	2 448	0.2%
Moldova	159 569	9.4%	11 846	0.8%

Common wheat flour (grain equivalent)

Origin	MY 2021/22 tonnes	MY 2021/22 share	MY 2020/21 tonnes	MY 2020/21 share
United Kingdom	133 152	86.1%	24 481	56.7%
Serbia	5 570	3.6%	2 318	5.4%
Mauritius	4 986	3.2%	5 197	12.0%
Moldova	3 413	2.2%	1 415	3.3%
India	3 280	2.1%	6 324	14.6%

Barley

Origin	MY 2021/22 tonnes	MY 2021/22 share	MY 2020/21 tonnes	MY 2020/21 share
United Kingdom	505 516	85.2%	142 446	65.0%
Ukraine	53 331	9.0%	36 881	16.8%
Serbia	15 676	2.6%	16 328	7.4%

Malt (grain equivalent)

Origin	MY 2021/22 tonnes	MY 2021/22 share	MY 2020/21 tonnes	MY 2020/21 share
United Kingdom	10 400	58.8%	928	16.6%
Serbia	5 776	32.7%	4 150	74.3%
Ukraine	1 257	7.1%	------------------	-----------

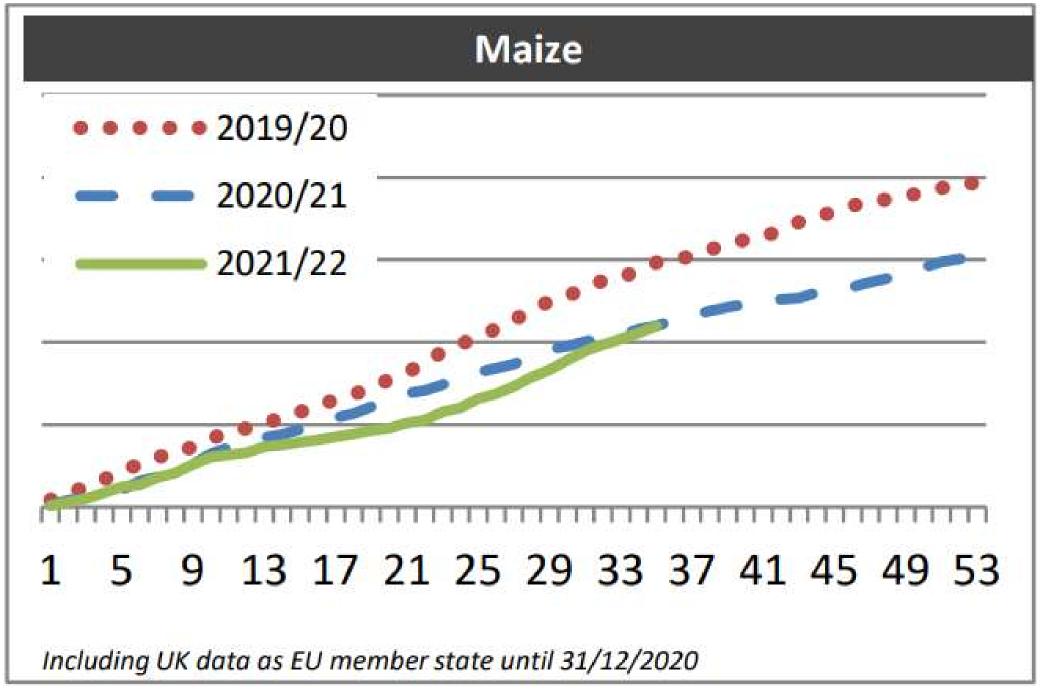
Maize

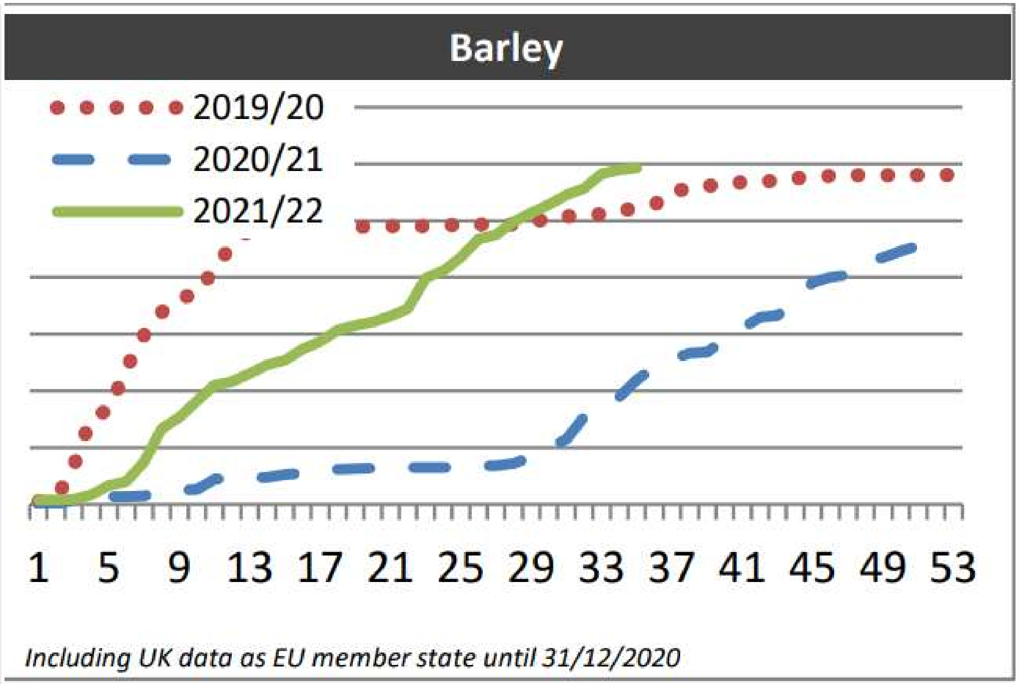
Origin	MY 2021/22 tonnes	MY 2021/22 share	MY 2020/21 tonnes	MY 2020/21 share
Ukraine	5 886 591	53.7%	4 191 083	38.1%
Brazil	3 288 118	30.0%	4 494 717	40.9%
Canada	590 209	5.4%	652 240	5.9%
Serbia	538 181	4.9%	1 119 526	10.2%
Moldova	255 113	2.3%	32 555	0.3%

Rye

Origin	MY 2021/22 tonnes	MY 2021/22 share	MY 2020/21 tonnes	MY 2020/21 share
Ukraine	116 138	59.6%	6	0.6%
Russia	66 999	34.4%	------------------	-----------

Cereals – EU Imports





Source: TAXUD Surv. Data

European Commission

Oilseeds

OILSEEDS SUPPLY & DEMAND *(thousand metric tonnes)*

last updated: 24/02/2022	2020/21 est.				2021/22 fc			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	1 500	1 500	1 000	4 000	500	1 100	700	2 300
Usable production	16 699	2 628	9 076	28 403	17 018	2 681	10 548	30 247
Area (thousand ha)	5 324	948	4 448	10 720	5 325	949	4 493	10 767
Yield (tonnes/ha)	3.14	2.77	2.04	2.65	3.20	2.83	2.35	2.81
Imports (from third countries)	5 797	15 028	818	21 643	4 900	14 500	500	19 900
Total supply	23 995	19 157	10 894	54 045	22 418	18 281	11 748	52 447
Domestic use	23 322	17 859	9 523	50 704	21 418	16 850	10 235	48 504
of which crushing	*(22 513)*	*(15 763)*	*(8 416)*	*(46 692)*	*(20 672)*	*(14 861)*	*(9 056)*	*(44 589)*
Exports (to third countries)	173	197	671	1 041	500	231	610	1 341
Total use	23 495	18 057	10 194	51 745	21 918	17 081	10 845	49 845
Ending stocks	500	1 100	700	2 300	500	1 200	903	2 603
Change in stocks	-1 000	-400	-300	-1 700	-	100	203	303

Sources : EC – DG AGRI

Oilseeds

OILSEED MEALS SUPPLY & DEMAND *(thousand metric tonnes)*

last updated: 24/02/2022	2020/21 est.				2021/22 fc			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	50	340	100	490	50	342	100	492
Usable production	12 832	12 453	4 629	29 914	11 783	11 740	4 981	28 504
Imports (from third countries)	467	16 607	2 684	19 757	600	16 400	2 000	19 000
Total supply	13 349	29 400	7 413	50 161	12 433	28 482	7 081	47 996
Domestic use	12 548	28 283	6 702	47 534	11 795	27 410	6 421	45 626
Exports (to third countries)	750	774	610	2 135	588	731	560	1 879
Total use	13 299	29 057	7 313	49 669	12 383	28 141	6 981	47 505
Ending stocks	50	342	100	492	50	342	100	492
Change in stocks	-	2	-	2	-	-1	-	-1

Sources : EC – DG AGRI

European Commission

Oilseeds

VEGETABLE OILS SUPPLY & DEMAND *(thousand metric tonnes)*

last updated: 24/02/2022	2020/21 est.					2021/22 fc				
	Rapeseed	Soya beans	Sunflower	Palm	TOTAL	Rapeseed	Soya beans	Sunflower	Palm	TOTAL
Beginning stocks	594	175	273	485	1 527	591	175	270	489	1 525
Usable production	9 230	3 153	3 535	0	15 917	8 476	2 972	3 804	0	15 251
Imports (from third countries)	314	479	1 691	6 338	8 822	500	446	2 000	5 600	8 546
Total supply	10 138	3 807	5 499	6 823	26 266	9 567	3 593	6 074	6 089	25 322
Domestic use	8 824	2 646	4 495	6 191	22 155	8 614	2 412	5 203	5 374	21 603
Exports (to third countries)	722	986	734	143	2 586	361	1 005	600	228	2 193
Total use	9 546	3 632	5 229	6 334	24 741	8 975	3 418	5 803	5 601	23 796
Ending stocks	591	175	270	489	1 525	592	175	271	488	1 526
Change in stocks	-2	-	-3	3	-2	1	-	1	-1	1

Sources : EC – DG AGRI

European Commission

Oilseeds – EU Trade

Cumul of week 1 to 35

(tonnes)	EU* 01/07/2021 - 27/02/2022		EU + UK 01/07/2020 - 28/02/2021		EU + UK 01/07/2019 - 01/03/2020	
	Export	Import	Export	Import	Export	Import
Soyabeans	221 137	8 712 906	149 836	9 691 017	168 048	9 378 265
Rapeseed	389 876	3 231 020	76 407	4 450 697	14 161	4 469 503
Sunflowerseed	209 365	313 708	397 599	716 717	281 983	722 603
Total seeds	**820 378**	**12 257 634**	**623 842**	**14 858 431**	**464 193**	**14 570 371**
Soyameal	555 906	10 603 509	367 970	11 624 650	316 083	12 130 972
Rapeseed meal	490 266	389 936	395 822	274 855	299 602	241 011
Sunflowerseed meal	418 084	1 373 035	325 530	1 753 907	341 998	2 003 837
Total meals	**1 464 256**	**12 366 480**	**1 089 323**	**13 653 411**	**957 684**	**14 375 819**
Soyaoil	666 045	369 440	503 301	331 028	377 319	339 634
Rapeseed oil	203 960	404 479	305 625	176 070	115 194	217 297
Sunflowerseed oil	378 208	1 300 921	365 740	1 249 759	342 528	1 501 587
Palm oil	124 520	3 378 150	62 234	3 802 239	82 913	3 785 493
Total oils	**1 372 733**	**5 452 989**	**1 236 900**	**5 559 096**	**917 954**	**5 844 011**
General Total	**3 657 366**	**30 077 104**	**2 950 064**	**34 070 939**	**2 339 831**	**34 790 201**

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Source: TAXUD Surv. Data

Oilseeds – EU Trade

Top 5 import origins* - Marketing Year 2021/22 (update of 27/02/2022)

Soyabeans		
Origin	tonnes	share
Brazil	3 719 308	42.7%
United States of America	3 522 337	40.4%
Canada	1 071 217	12.3%
Ukraine	299 569	3.4%
Togo	22 554	0.3%

Rapeseed		
Origin	tonnes	share
Ukraine	1 612 674	49.9%
Australia	865 591	26.8%
Canada	501 757	15.5%
Moldova	79 012	2.4%
Serbia	59 285	1.8%

Sunflowerseed		
Origin	tonnes	share
Moldova	191 391	61.0%
Turkey	26 505	8.4%
China	24 572	7.8%
Serbia	18 634	5.9%
Ukraine	16 656	5.3%

Soyameal		
Origin	tonnes	share
Brazil	4 788 997	45.2%
Argentina	4 300 641	40.6%
Paraguay	422 957	4.0%
United States of America	314 419	3.0%
India	195 748	1.8%

Rapeseed meal		
Origin	tonnes	share
Russia	141 695	36.3%
Ukraine	137 491	35.3%
United Kingdom	66 964	17.2%
Belarus	36 021	9.2%

Sunflowerseed meal		
Origin	tonnes	share
Ukraine	538 020	39.2%
Russia	468 416	34.1%
Argentina	321 029	23.4%
Serbia	33 870	2.5%
Bosnia and Herzegovina	9 880	0.7%

Sunflowerseed oil		
Origin	tonnes	share
Ukraine	1 117 185	85.9%
Moldova	84 829	6.5%
Serbia	60 711	4.7%
Bosnia and Herzegovina	9 278	0.7%
United Kingdom	9 128	0.7%

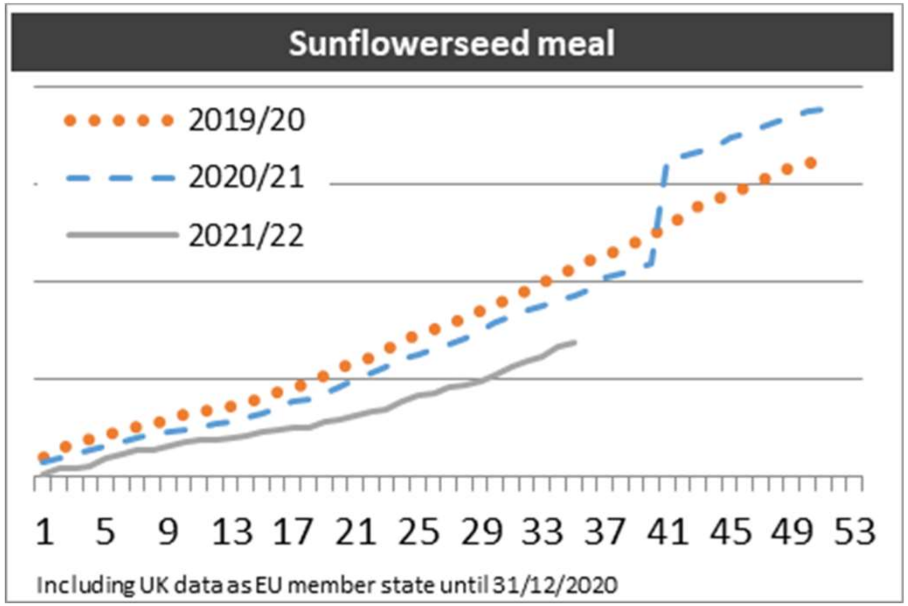
Rapeseed oil		
Origin	tonnes	share
Ukraine	125 629	31.1%
Russia	101 234	25.0%
Belarus	76 602	18.9%
United Kingdom	47 692	11.8%
United Arab Emirates	30 750	7.6%

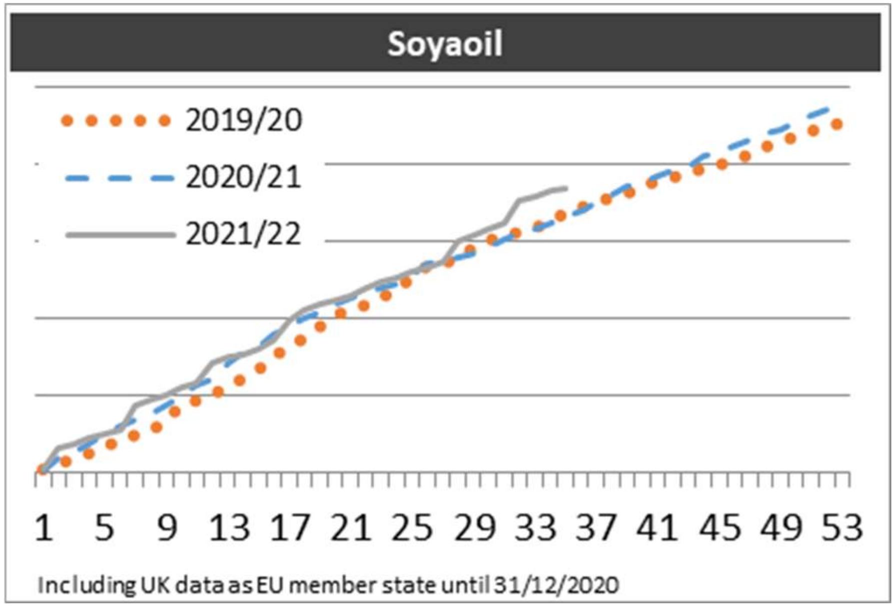
Soyaoil		
Origin	tonnes	share
Ukraine	129 502	35.1%
Argentina	109 164	29.5%
Norway	46 702	12.6%
Serbia	32 098	8.7%
Russia	23 524	6.4%

Source: TAXUD Surv. Data

European Commission

Oilseeds – EU Imports





Source: TAXUD Surv. Data

European Commission

Logistics

Ukraine

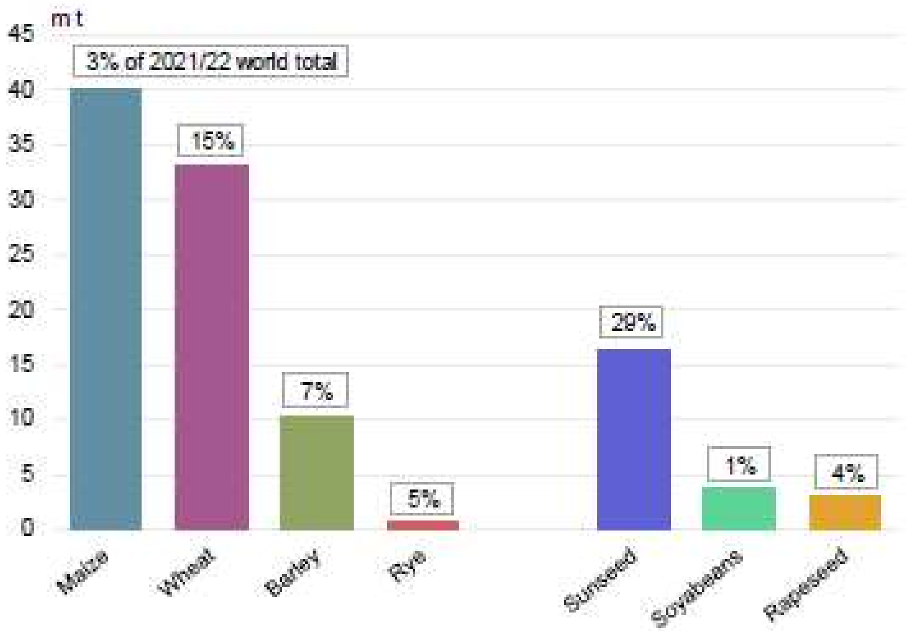
- All **Black Sea** ports are closed, damages to port infrastructure likely but hard to assess at this stage.
- Damages to storage facilities at ports or inland are unknown. Same for railwork.

Russia

- **Azov sea** closed for commercial shipping.
- **Black sea** ports reported to be open, but very limited grain shipments due to insecurity.
- Capacity for RUS to switch some grain exports to rail (e.g. to KZH).
- Grain shipments to Turkey/Egypt?

Situation in Ukraine

Grains & oilseeds: Ukraine production (21/22)



Grains & oilseeds: Ukraine production trends

m t	18/19	19/20	20/21 (est.)	21/22 (f'cast)	y/y change
Wheat	25.1	29.2	25.4	33.0	+ 29.8%
Maize	35.8	35.9	30.3	40.0	+ 32.0%
Barley	7.6	9.5	7.9	10.2	+ 28.4%
Rye	0.4	0.3	0.5	0.6	+ 30.7%
Other coarse grains	0.9	1.0	1.1	1.0	- 8.5%
Total grains	69.7	75.9	65.3	84.8	+ 30.0%
Sunflowerseed	15.3	16.5	13.1	16.4	+ 25.1%
Soyabeans	4.5	3.7	2.8	3.4	+ 21.8%
Rapeseed	2.9	3.5	2.7	2.9	+ 6.8%
Oilseeds	22.6	23.7	18.6	22.7	+ 21.9%

Source: IGC

European Commission

Situation in Ukraine

Cereals

- **Global market** – in 2021/22 (Jul/Jun) Ukraine was forecast to represent 18% of **maize** exports, 12% for **wheat**, and 12% for **barley.**

(source – IGC forecast)

- **Unshipped volumes** in 2021/22: 6.6m t of **wheat**, 13.6m t of **maize** and 0.4m t of **barley**. *(IGC estimate)*

Oilseeds

- **Global market** - marketing year 2021/22: Ukraine accounts for 16% of the **rapeseed** market, 50% of the **sunflower seed oil** market, 9% of trade in **sunflower seeds** and 61% of that of **sunflower meal**

(source – IGC forecast).

European Commission

Alternative sources – adaptation strategies

Maize

- Short-term supplies limited primarily to US. In a few months, with new crops arriving on world market, ARG and BRA.
- Strong competition for available supplies & uncertain Chinese demand.
- In EU: replace some maize with feed wheat or feed barley in feed mix.
- If no or very limited sowings in UKR for 2022 harvest, very tight global supplies.

Oilseeds (sunflower meal)

- The possible tight availabilities of sunflower seed meal in the EU could be offset by higher use of **soya bean meal.**
- Lower **sunflower meal** demand from China due to an increase production (46% year-on-year).
- Limited **sunflower oil** availabilities in Argentina (-11% year-on-year).

European Commission

Thank you