



Oilseeds and Protein Crops market situation

**Civil Dialogue Group Arable Crops
Dried fodder, Energy and Non-food crops**

1st June 2018



Contents

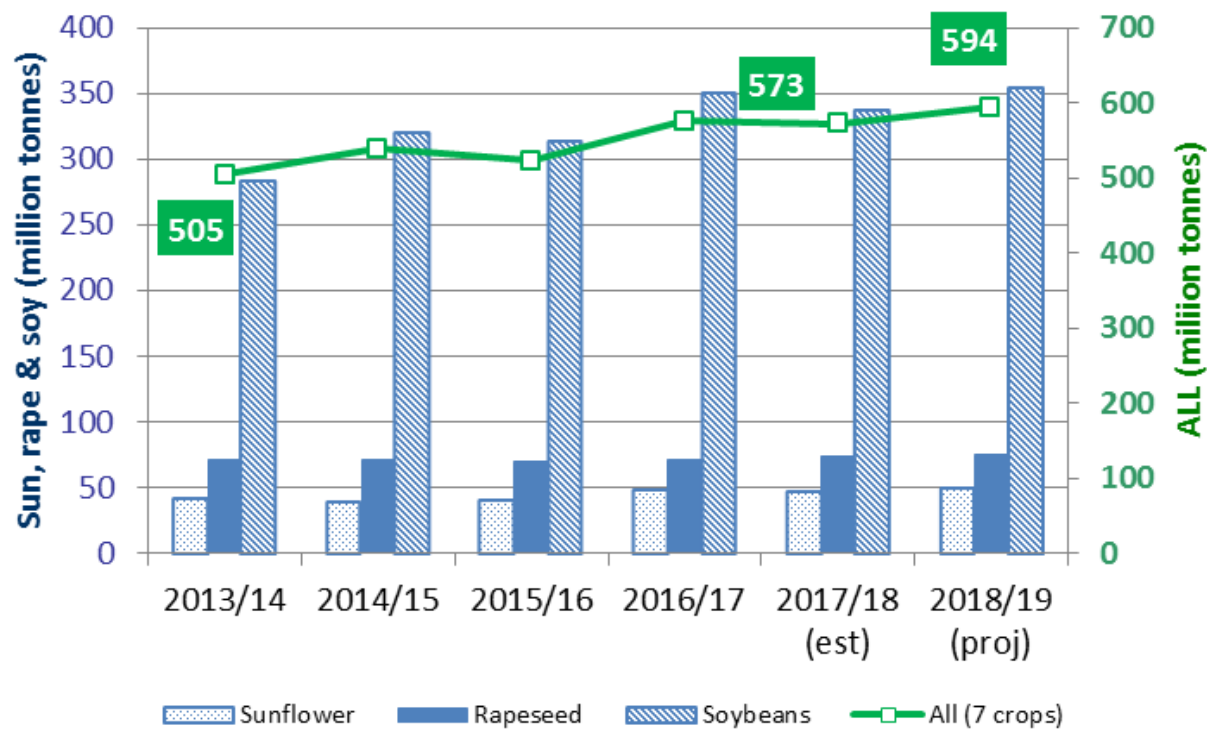
1. World Oilseeds

2. EU Oilseeds & Protein crops: areas & production (2018/19)

3. S&D balance sheets (oilseeds, oils, meals)

4. S&D balance sheet (protein crops)

World oilseeds production 2018/19



Total/changes (y/y):

Oilseeds: 594 m t ↑

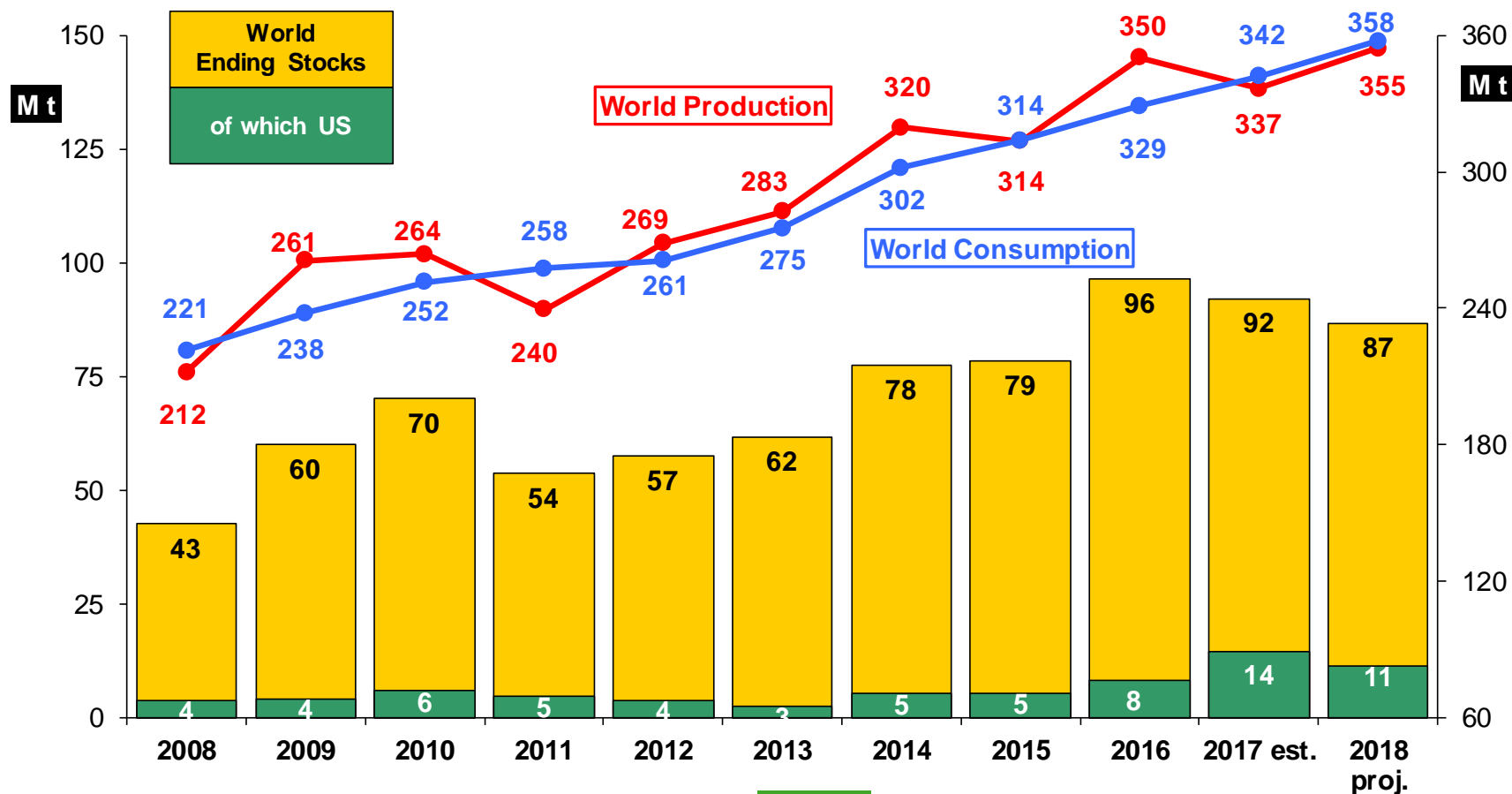
Soybeans: 355 m t ↑

Rapeseed: 75 m t ↑

Sunflower: 50 m t ↑

Source: USDA

Soybeans: production, consumption, stocks



Source: USDA May report



World oilseeds production: key messages

Total Oilseeds:

- **First projections 2018/19 marketing year: higher production** (594 m t; +10% vs 5 year average), **higher consumption** and **lower ending stocks** compared to 2017/18.

Soybeans

- production is projected up 18 m t y/y – mostly due to recovery from drought in ARG (355 m t; +11% vs 5 year average)
- US production cut y/y on lower harvested area and trend yields (116 m t)
- Production in South America: increase in ARG (up 17 m t y/y), flat production projected for BZ

Rapeseed

- Forecast at record level of 75 m t (+5% vs 5 year average)

Sunflower

- global production projected to increase to 50 m t (+15% vs 5 year average)

World oilseeds: Export prices (fob)

| Export prices FOB | | 22 mai 2018 | | Changes on average | | | | | |
|-------------------|----------------------|-------------|---------|--------------------|---|----|---------|---|----|
| | | | | m/m | | | y/y | | |
| | | EUR/t | US \$/t | US \$/t | | % | US \$/t | | % |
| <i>soybeans</i> | Argentina - Up River | 352 | 415 | -6 | ▼ | -1 | 55 | ▲ | 15 |
| | Brazil - Paranagua | 341 | 403 | -24 | ▼ | -6 | 39 | ▲ | 11 |
| | US Gulf | 341 | 402 | -15 | ▼ | -4 | 37 | ▲ | 10 |
| | Ukraine | 366 | 432 | -1 | ▬ | 0 | 53 | ▲ | 14 |
| <i>rapeseed</i> | Australia | 362 | 427 | -2 | ▬ | 0 | -13 | ▼ | -3 |
| | Canada | 389 | 459 | -2 | ▬ | 0 | 34 | ▲ | 8 |
| | EU (Rouen) | 353 | 416 | -7 | ▼ | -2 | 13 | ▲ | 3 |
| | Ukraine | 353 | 417 | -9 | ▼ | -2 | 19 | ▲ | 5 |
| <i>sunflower</i> | EU (Bordeaux) | 331 | 391 | -14 | ▼ | -3 | -15 | ▼ | -4 |
| | Ukraine | 320 | 377 | 1 | ▬ | 0 | -1 | ▬ | 0 |



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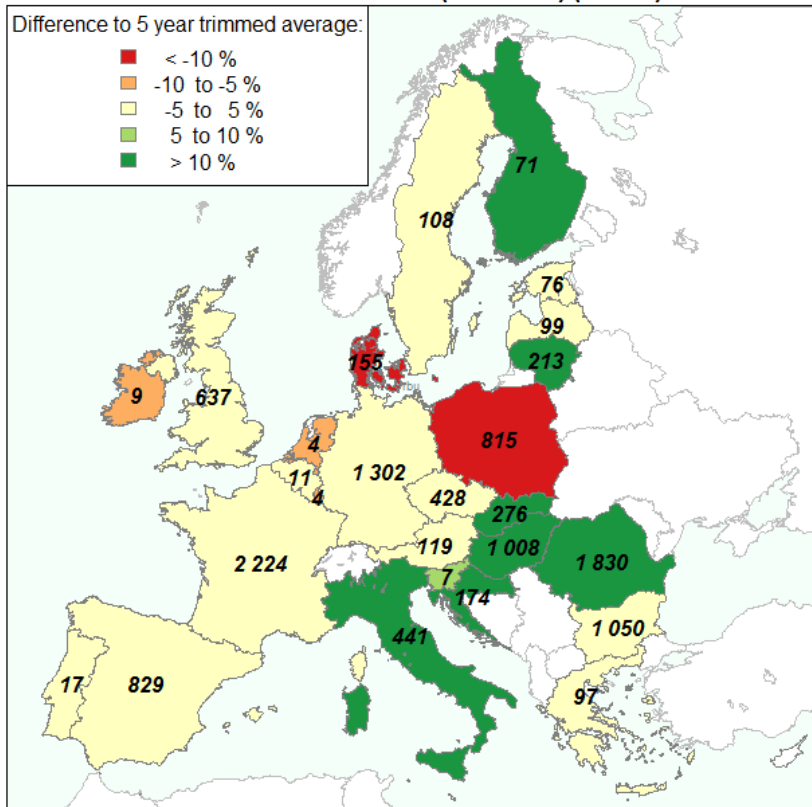
European
Commission

EU Oilseeds (incl. Linseed)

All oilseeds area 2018 (1000 ha) (f'cast.)

Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %



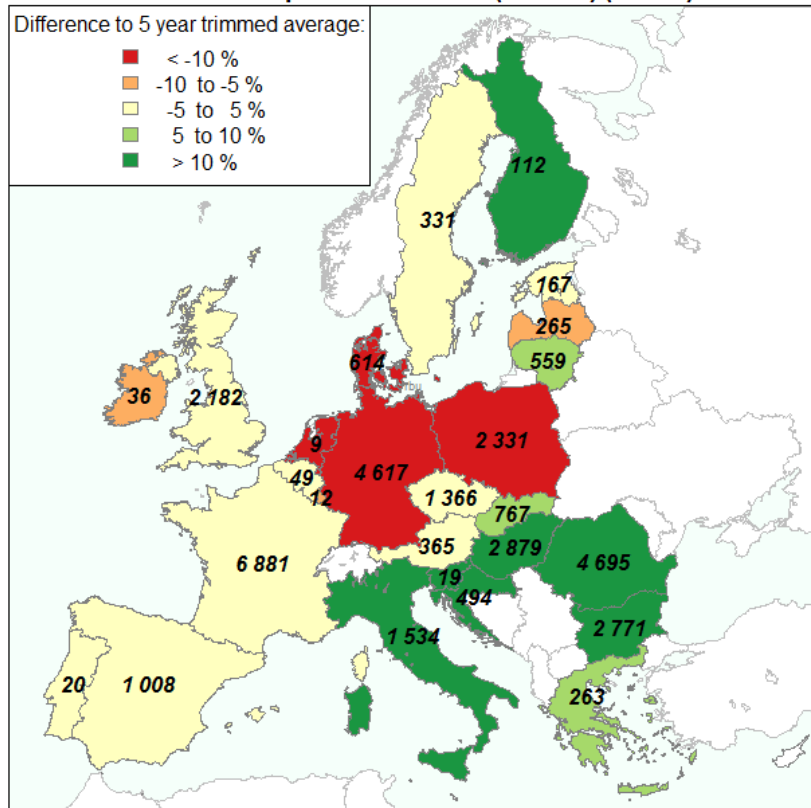
EU28 area : 12 005 (1000 ha) Difference to 5 year trimmed average: 3 %

Calculations and cartography: European Commission DG AGRI G4 2018-05-29 © EuroGeographics for the administrative boundaries

All oilseeds production 2018 (1000 t) (f'cast.)

Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %

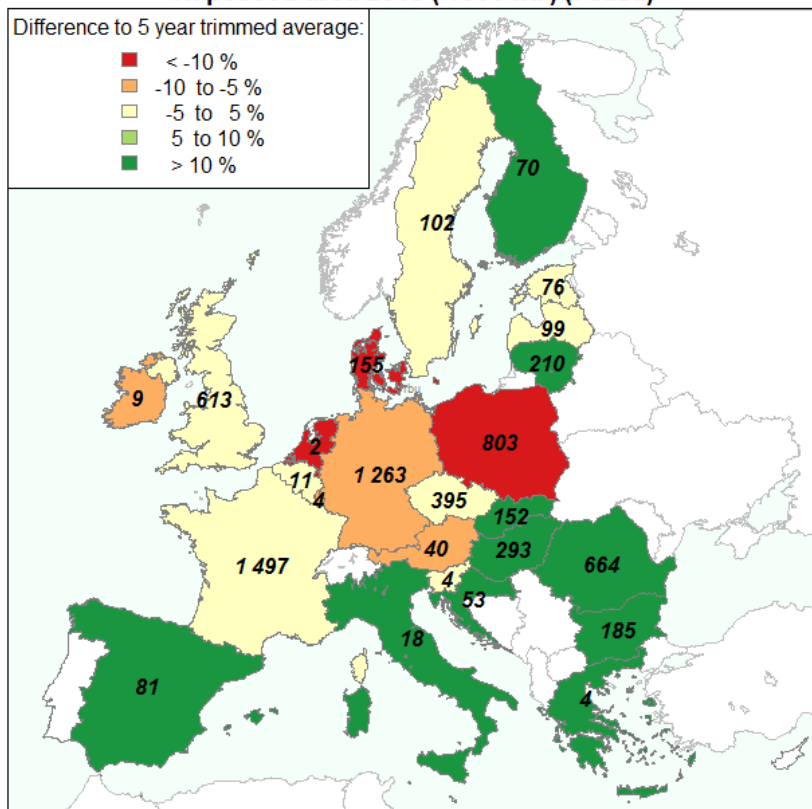


EU28 production : 34 346 (1000 t) Difference to 5 year trimmed average: 4 %

Calculations and cartography: European Commission DG AGRI G4 2018-05-29 © EuroGeographics for the administrative boundaries

EU rapeseed

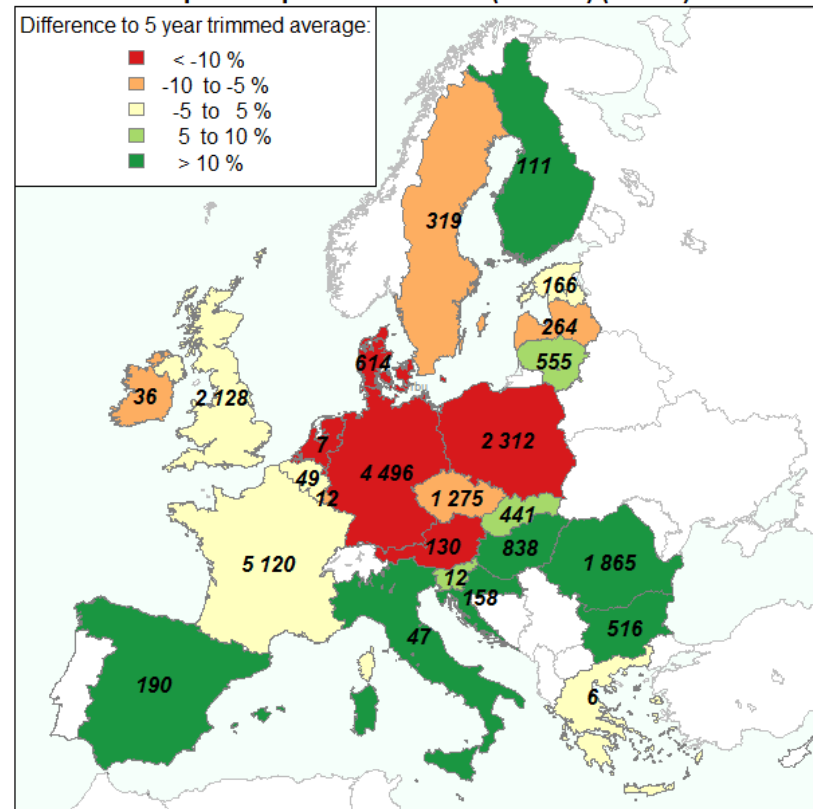
Rapeseed area 2018 (1000 ha) (f'cast.)



EU28 area : 6 802 (1000 ha) Difference to 5 year trimmed average: 2 %

Calculations and cartography: European Commission DG AGRI G4 2018-05-29 © EuroGeographics for the administrative boundaries

Rapeseed production 2018 (1000 t) (f'cast.)



EU28 production : 21 667 (1000 t) Difference to 5 year trimmed average: 0 %

Calculations and cartography: European Commission DG AGRI G4 2018-05-29 © EuroGeographics for the administrative boundaries



European
Commission

JRC MARS May Bulletin: rapeseed

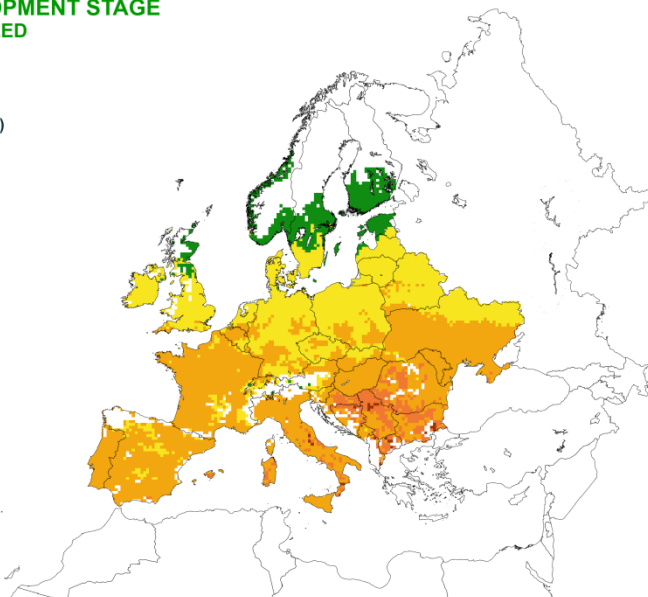
Dry and warmer-than-usual temperatures **shortened flowering period**, led to **flower abortion**, **bud desiccation**, **weak plant status**

CROP DEVELOPMENT STAGE WINTER RAPESEED

from : 01 May 2018
to : 10 May 2018

Year of interest (YOI)

Unit: -
vegetative
flowering
grain filling
ripening
maturity



16/05/2018
resolution: 25x25 km



© European Union 2018
Source: Joint Research Centre (JRC CGMS 12)
Processed by: Alterra consortium

MAX. TEMP. AROUND FLOWERING WINTER RAPESEED

Highest values

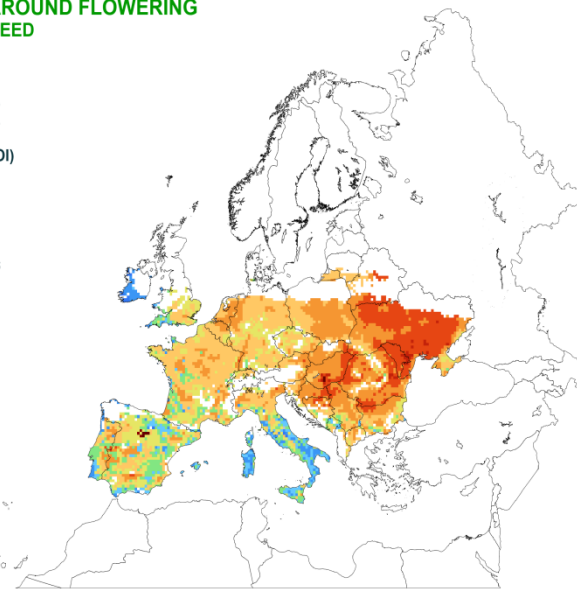
from : 01 May 2018
to : 10 May 2018

Year of interest (YOI)

Unit: degrees Celsius

<= 10
> 10 - <= 15
> 15 - <= 20
> 20 - <= 22
> 22 - <= 24
> 24 - <= 26
> 26 - <= 28
> 28 - <= 30
> 30 - <= 32
> 32 - <= 34
> 34 - <= 36
> 36

16/05/2018
resolution: 25x25 km



© European Union 2018
Source: Joint Research Centre (JRC CGMS 12)
Processed by: Alterra consortium



EU Oilseeds 2018/19: key messages

- **Area** at 12 m ha, with increase for rapeseed but decrease for soybeans – at record level last marketing year – and unchanged for sunflower.
- **Production** forecast decreased to 34.2 m t due to lower rapeseed output now forecasted at 22 m t.

EU Protein crops

EU PROTEIN CROPS AREA

| Million ha | AVG 5 yrs trimmed | 2017/18 | 2018/19 April | 2018/19 May | %change 2017/18 | %change 5yrs trimmed |
|--------------|----------------------|------------|------------------|----------------|--------------------|-------------------------|
| Field peas | 0.7 | 1.0 | 0.90 | 0.88 | -13.7 | 20.7 |
| Broad beans | 0.6 | 0.7 | 0.65 | 0.65 | -7.2 | 17.2 |
| Sweet lupins | 0.2 | 0.2 | 0.20 | 0.21 | 9.9 | 27.6 |
| TOTAL | 1.4 | 1.9 | 1.75 | 1.74 | -9.0 | 20.2 |

Sources : EC - DG AGRI

EU PROTEIN CROPS PRODUCTION

| Million tonnes | AVG 5 yrs trimmed | 2017/18 | 2018/19 April | 2018/19 May | %change 2017/18 | %change 5yrs trimmed |
|----------------|----------------------|------------|------------------|----------------|--------------------|-------------------------|
| Field peas | 2.3 | 2.7 | 2.2 | 2.4 | -12.8 | 5.9 |
| Broad beans | 2.0 | 2.2 | 1.9 | 2.1 | -4.7 | 4.3 |
| Sweet lupins | 0.3 | 0.3 | 0.3 | 0.4 | 14.5 | 11.2 |
| TOTAL | 4.6 | 5.2 | 4.4 | 4.8 | -7.8 | 5.6 |

Sources : EC - DG AGRI



EU Protein crops 2018/19: key messages

- **Area** forecast 9% below last year: at this stage very tentative because mostly based on last 3 years **average, not MS notification**
- **Production** forecast below last year, but still above the 5 years trimmed average thanks to good yields.



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EU oilseeds balance sheet

Thousand metric tonnes

| OILSEED * | 2017/18 fc | | | | 2018/19 fc | | | |
|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | Rapeseed | Soybean | Sunflower | TOTAL *** | Rapeseed | Soybean | Sunflower | TOTAL *** |
| Beginning stocks | 1 033 | 1 217 | 667 | 2 917 | 1 061 | 1 322 | 656 | 3 039 |
| Usable production | 21 961 | 2 618 | 10 369 | 34 949 | 21 667 | 2 806 | 9 726 | 34 199 |
| <i>Area (thousand ha)</i> | 6 680 | 947 | 4 232 | 11 859 | 6 802 | 902 | 4 233 | 11 936 |
| <i>Yield (tonnes/ha)</i> | 3.3 | 2.8 | 2.5 | 2.9 | 3.2 | 3.1 | 2.3 | 2.9 |
| Imports (from third countries) | 4 200 | 13 500 | 500 | 18 200 | 3 739 | 13 709 | 436 | 17 885 |
| Total supply | 27 195 | 17 335 | 11 536 | 56 066 | 26 467 | 17 838 | 10 818 | 55 123 |
| Domestic use | 25 934 | 15 713 | 10 481 | 52 127 | 25 086 | 16 388 | 9 717 | 51 192 |
| <i>of which crushing</i> | 25 104 | 14 016 | 9 225 | 48 346 | 24 284 | 14 619 | 8 553 | 47 457 |
| Exports (to third countries) | 200 | 300 | 400 | 900 | 316 | 153 | 460 | 929 |
| Total use | 26 134 | 16 013 | 10 881 | 53 027 | 25 402 | 16 542 | 10 177 | 52 121 |
| Ending stocks**** | 1 061 | 1 322 | 656 | 3 039 | 1 065 | 1 296 | 641 | 3 002 |
| Change in stocks**** | 28 | 106 | -11 | 122 | 4 | -26 | -15 | -37 |

* Marketing year: from July to June

*** Total of rapeseed, soybean and sunflower

**** At the end of the marketing year

EU oilmeals balance sheet

| OILSEED MEAL * | 2017/18 fc | | | | 2018/19 fc | | | |
|--------------------------------|---------------|---------------|--------------|---------------|---------------|---------------|--------------|---------------|
| | Rapeseed | Soybean | Sunflower | TOTAL *** | Rapeseed | Soybean | Sunflower | TOTAL *** |
| Beginning stocks | 50 | 333 | 100 | 483 | 50 | 344 | 100 | 494 |
| Usable production | 14 309 | 11 073 | 5 074 | 30 456 | 13 842 | 11 549 | 4 704 | 30 096 |
| Imports (from third countries) | 300 | 18 800 | 3 600 | 22 700 | 387 | 18 619 | 3 349 | 22 355 |
| Total supply | 14 659 | 30 206 | 8 774 | 53 640 | 14 279 | 30 513 | 8 153 | 52 945 |
| Domestic use | 14 195 | 29 544 | 8 374 | 52 113 | 13 796 | 29 855 | 7 797 | 51 449 |
| Exports (to third countries) | 415 | 318 | 300 | 1 032 | 433 | 315 | 256 | 1 003 |
| Total use | 14 609 | 29 862 | 8 674 | 53 145 | 14 229 | 30 170 | 8 053 | 52 452 |
| Ending stocks**** | 50 | 344 | 100 | 494 | 50 | 343 | 100 | 493 |
| Change in stocks**** | - | 11 | - | 11 | - | -2 | - | -2 |

* Marketing year: from July to June

*** Total of rapeseed, soybean and sunflower

**** At the end of the marketing year

EU vegetable oils balance sheet

Thousand metric tonnes

| VEGETABLE OILS * | 2016/17 est | | | 2017/18 fc | | | | | 2018/19 fc | | | | |
|--------------------------------|--------------|--------------|---------------|---------------|--------------|--------------|--------------|---------------|---------------|--------------|--------------|--------------|---------------|
| | Sunflower | Palm | TOTAL *** | Rapeseed | Soybean | Sunflower | Palm | TOTAL *** | Rapeseed | Soybean | Sunflower | Palm | TOTAL *** |
| Beginning stocks | 250 | 500 | 1 500 | 600 | 175 | 283 | 475 | 1 533 | 592 | 175 | 269 | 492 | 1 528 |
| Usable production | 3 346 | 0 | 15 851 | 10 293 | 2 803 | 3 875 | 0 | 16 971 | 9 956 | 2 924 | 3 592 | 0 | 16 473 |
| Imports (from third countries) | 1 673 | 6 774 | 8 887 | 226 | 295 | 1 700 | 7 000 | 9 221 | 231 | 301 | 1 337 | 6 947 | 8 816 |
| Total supply | 5 268 | 7 274 | 26 238 | 11 119 | 3 273 | 5 858 | 7 475 | 27 725 | 10 780 | 3 400 | 5 199 | 7 438 | 26 817 |
| Domestic use | 4 530 | 6 647 | 22 851 | 10 227 | 2 298 | 5 207 | 6 841 | 24 574 | 9 855 | 2 337 | 4 537 | 6 804 | 23 533 |
| Exports (to third countries) | 455 | 152 | 1 853 | 300 | 800 | 381 | 142 | 1 624 | 336 | 887 | 395 | 146 | 1 764 |
| Total use | 4 985 | 6 799 | 24 705 | 10 527 | 3 098 | 5 589 | 6 983 | 26 197 | 10 191 | 3 225 | 4 932 | 6 949 | 25 297 |
| Ending stocks**** | 283 | 475 | 1 533 | 592 | 175 | 269 | 492 | 1 528 | 589 | 175 | 268 | 489 | 1 520 |
| Change in stocks**** | 33 | -25 | 33 | -8 | - | -14 | 17 | -6 | -3 | - | -2 | -3 | -7 |

* Marketing year: from July to June

*** Total of rapeseed, soybean, sunflower and palm oil

**** At the end of the marketing year



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EU Protein crops 2017/18 balance sheet

| LAST UPDATED: 06/04/2018 | Grain legumes | | | | | | | Fodder legumes | | |
|---------------------------------|---------------|--------------|------------|--------------|------------|----------------------------|--------------|----------------|--------------------------------|---------------|
| | Peas | Broad beans | Lentils | Sweet lupins | Chickpeas | Beans and Other dry pulses | EUR 28 | Lucerne | Green leguminous mainly Clover | EUR 28 |
| Beginning stocks | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |
| Usable production | 2 695 | 1 930 | 55 | 296 | 66 | 700 | 5 742 | 36 128 | 14 406 | 50 534 |
| Imports (from third countries)* | 151 | 11 | 244 | 234 | 160 | 478 | 1 278 | 11 | 11 | 22 |
| Dried | 149 | 10 | 242 | 234 | 158 | 476 | | 11 | 11 | |
| Flour & meals | 2 | 2 | 2 | | 2 | 2 | | | | |
| Total supply | 2 846 | 1 941 | 299 | 530 | 225 | 1 178 | 7 020 | 36 139 | 14 417 | 50 556 |
| Total domestic use | 2 155 | 1 517 | 293 | 530 | 185 | 1 109 | 5 789 | 34 965 | 14 414 | 49 379 |
| Food (dried) | 618 | 236 | 293 | 5 | 185 | 517 | 1 854 | | | |
| Animal feed | 1 537 | 1 281 | | 525 | | 592 | 3 936 | 34 965 | 14 414 | |
| Non-food industrial use | | | | | | | | | | |
| Exports (to third countries)* | 691 | 424 | 5 | | 40 | 69 | 1 231 | 1 174 | 3 | 1 178 |
| Dried | 689 | 423 | 4 | | 39 | 67 | | 1 174 | 3 | |
| Flour & meals | 2 | 2 | 2 | | 2 | 2 | | | | |
| Total use | 2 846 | 1 941 | 299 | 530 | 225 | 1 178 | 7 020 | 36 139 | 14 417 | 50 556 |
| Ending stocks | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |



EU Protein crops 2017/18 balance sheet

Comments welcome:

- Which crops to include?
- Opening/closing stocks: which data?
- Food/feed consumption: which data?



Thank you for your attention!

**Market data the 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)**