



# **OILSEEDS and PROTEIN CROPS**

**CIVIL DIALOGUE GROUP "ARABLE CROPS"**

**12 October 2017**



European  
Commission

# Content

EU oilseeds & protein crops:

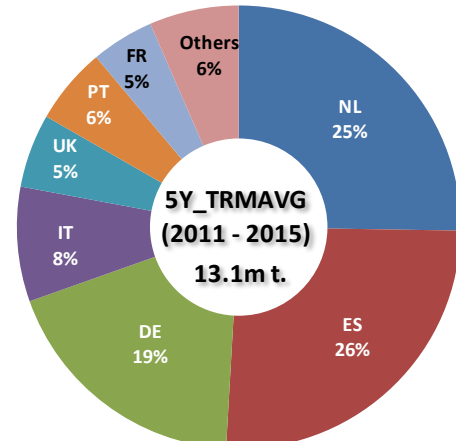
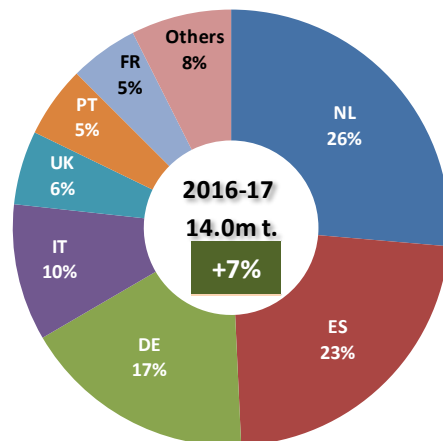
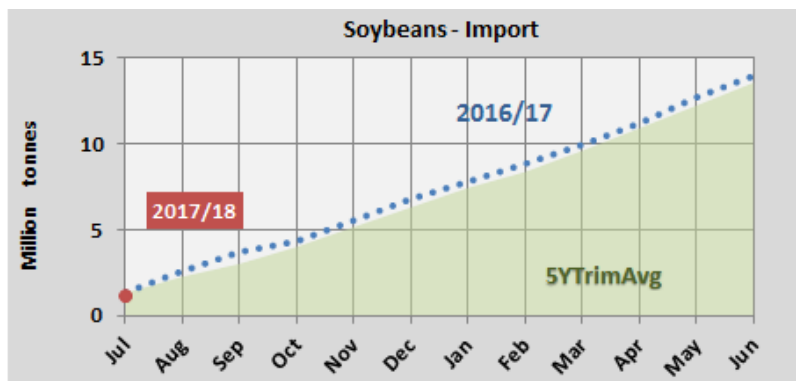
1. trade (2016/17)

2. areas & production (2017/18)



# **2016/17 EU 28 Oilseeds & protein crops trade (12 Months)**

## EU soybeans imports

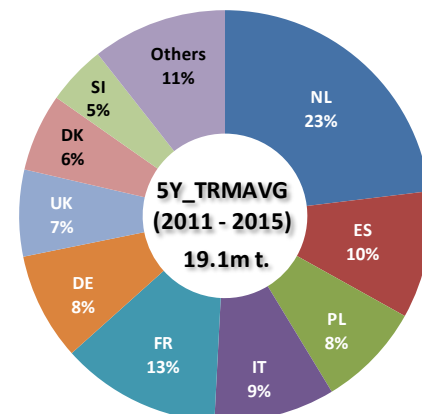
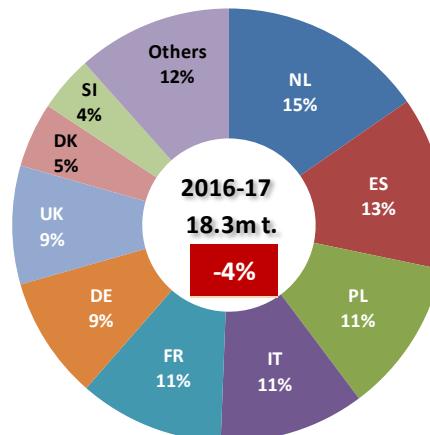
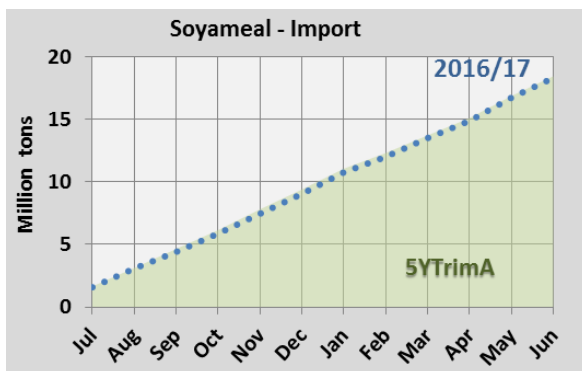


### Origin of imports

(Thousand tons)	5Y_TRMAVG (2011 - 2015)	2016-17
United States	3 648	5 087 ↑ 39%
Brazil	5 821	5 073 ↓ -13%
Canada	1 109	1 064 ↓ -4%
Paraguay	1 559	908 ↓ -42%
Uruguay	456	678 ↑ 49%
Others	467	1 172 ↑ 151%

(Thousand tons)	5Y_TRMAVG (2011 - 2015)	2016-17
NL	3 298	3 686 ↑ 12%
ES	3 351	3 203 ↓ -4%
DE	2 437	2 422 ↓ -1%
IT	1 092	1 417 ↑ 30%
UK	702	765 ↑ 9%
PT	731	741 ↑ 1%
FR	598	709 ↑ 19%
Others	852	1 039 ↑ 22%

## EU soymeal imports

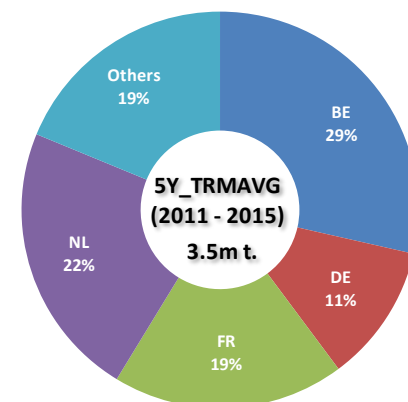
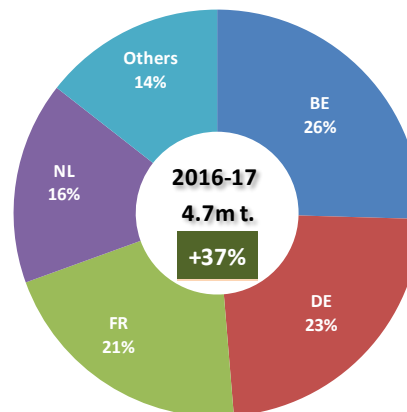
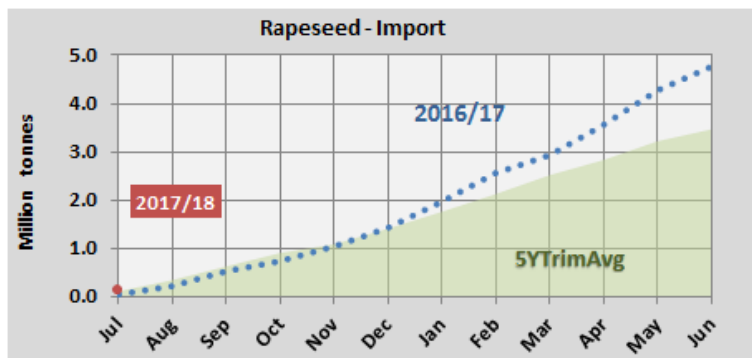


## Origin of imports

(Thousand tons)	5Y_TRMAVG (2011 - 2015)	2016-17
Argentina	8 413	8 824 ↑ 5%
Brazil	7 950	6 785 ↓ -15%
Paraguay	523	1 220 ↑ 133%
Others	2 195	1 495 ↓ -32%

(Thousand tons)	5Y_TRMAVG (2011 - 2015)	2016-17
NL	4 404	2 811 ↓ -36%
ES	1 910	2 370 ↑ 24%
PL	1 570	2 106 ↑ 34%
IT	1 813	1 987 ↑ 10%
FR	2 393	1 984 ↓ -17%
DE	1 612	1 675 ↑ 4%
UK	1 299	1 623 ↑ 25%
DK	1 167	887 ↓ -24%
SI	890	761 ↓ -15%
Others	2 022	2 121 ↑ 5%

## EU rapeseed imports



### Origin of imports

(Thousand tons)	5Y_TRMAVG (2011 - 2015)	2016-17	
Australia	1 682	2 349 ↑	40%
Ukraine	1 114	801 ↓	-28%
Canada	150	762 ↑	407%
Others	522	832 ↑	59%

(Thousand tons)	5Y_TRMAVG (2011 - 2015)	2016-17	
BE	990	1 208 ↑	22%
DE	391	1 102 ↑	182%
FR	655	986 ↑	50%
NL	781	763 ↓	-2%
Others	651	685 ↑	5%



# EU oilseeds Trade - Key messages

## **Soybeans**

Imports +7% (vs trimmed five years average) at 14 m t  
Mainly from US and BZ

## **Soybeans meals**

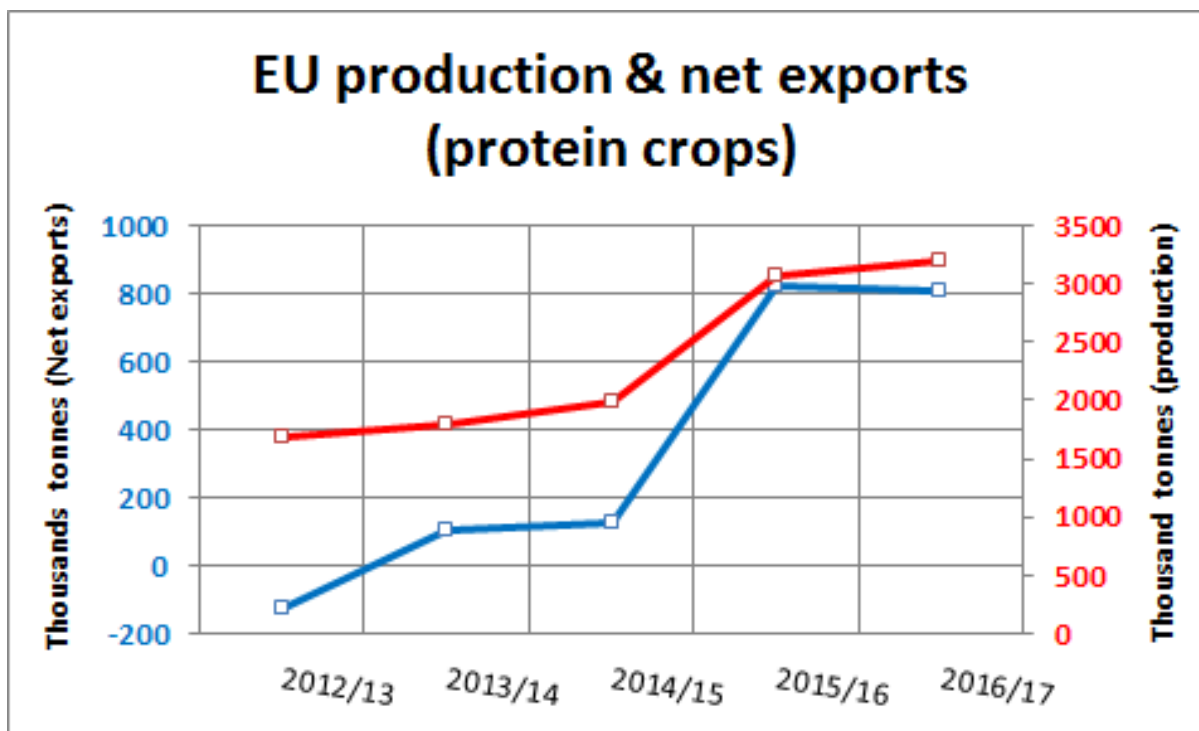
Imports -4% at 18.3 m t  
Mainly from ARG and Brazil

## **Rapeseed**

Rapeseed imports +37% (poor EU crop) with 4.7m t  
Mainly from Australia; share of Canada in total imports increased.-

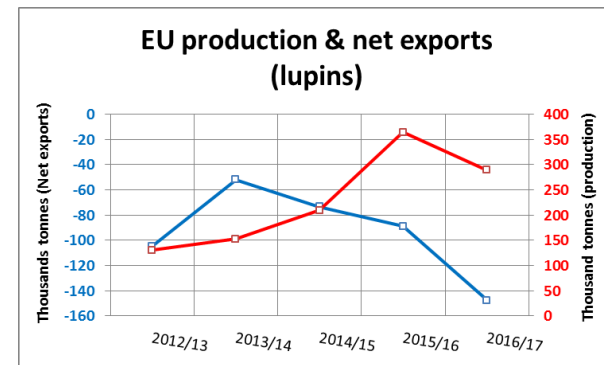
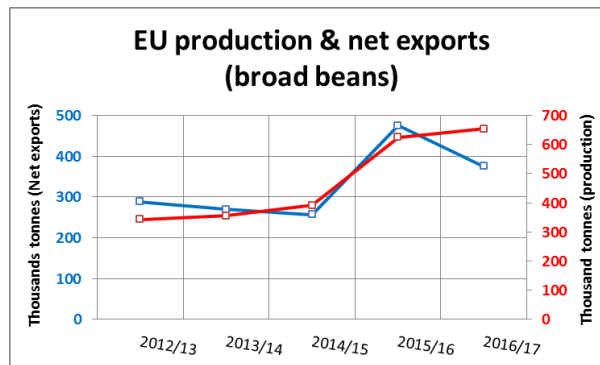
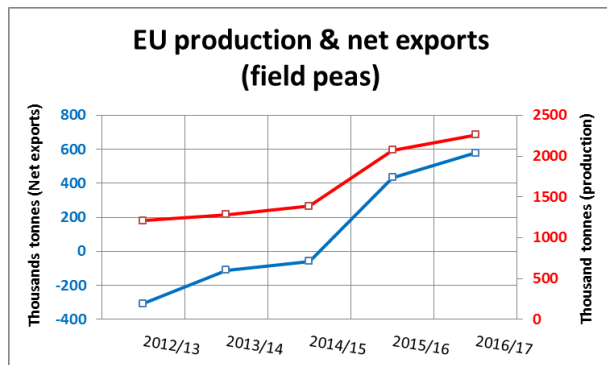


## EU protein crops trade





## EU protein crops trade



## EU partners in 2016-17 marketing year

Imports from	Exports to
Canada	India
Russia	Norway
Ukraine	Pakistan
Argentina	Turkey*
Turkey*	Switzerland

Imports from	Exports to
Egypt*	Egypt*
Turkey	Norway
Australia	Sudan
China	Morocco
Lebanon*	Lebanon*

Imports from	Exports to
Australia	Canada
Ukraine	Switzerland
Chile	Brazil
South Africa	China
Russia*	Russia*

Source: EUROSTAT (COMEXT)



# EU protein crops trade - Key messages

Since 2014, the EU is a net exporter of protein crops

Dynamic trade including countries from Asia, Americas and Africa

- Field peas: from net importer to net exporter
- Broad beans: traditionnally net exporter – export volume increase (since 2014)
- Lupins: traditionnally net importer – import volume increase (since 2013)



# **2017/18 EU 28 Oilseeds & protein crops Areas & production**

# EU Oilseeds

## EU OILSEEDS AREA

Million ha	AVG 5 yrs trimmed	2016/17	2017/18 August 2017	2017/18 September 2017	%change 2016/17	%change 5yrs trimmed
Rapeseed	6.6	6.5	6.7	6.8	4.0	3.6
Sunflower	4.3	4.2	4.2	4.3	4.7	2.1
Soja	0.6	0.8	0.9	0.9	12.6	50.4
Linseed	0.1	0.1	0.1	0.1	-19.9	4.2
<b>TOTAL</b>	<b>11.5</b>	<b>11.6</b>	<b>11.9</b>	<b>12.2</b>	<b>4.7</b>	<b>5.6</b>

Sources : DG AGRI G.4

## EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 August 2017	2017/18 September 2017	%change 2016/17	%change 5yrs trimmed
Rapeseed	21.0	20.1	21.9	22.3	10.9	6.3
Sunflower	8.5	8.5	8.7	9.2	8.2	7.3
Soja	1.8	2.5	2.6	2.7	8.5	49.4
Linseed	0.1	0.1	0.1	0.1	-3.4	1.9
<b>TOTAL</b>	<b>31.4</b>	<b>31.2</b>	<b>33.3</b>	<b>34.3</b>	<b>9.9</b>	<b>9.0</b>

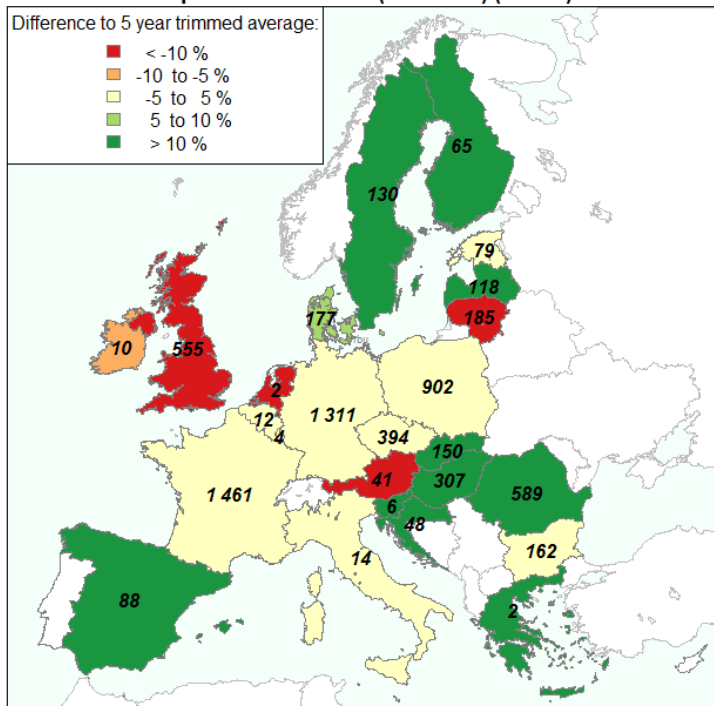
Sources : DG AGRI G.4



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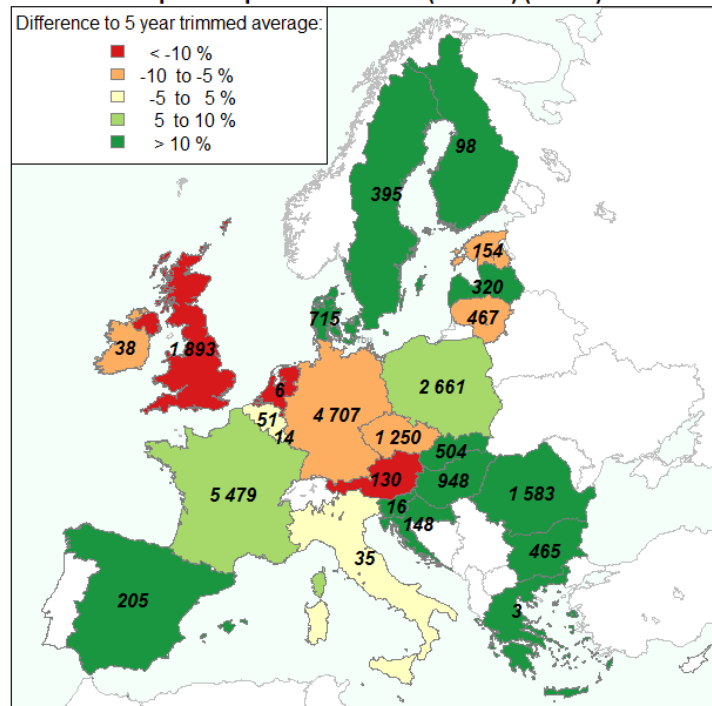
# EU Rapeseed

**Rapeseed area 2017 ( 1000 ha ) (f'cast.)**



Calculations and cartography: European Commission DG AGRI 04 2017-09-21 © EuroGeographics for the administrative boundaries

**Rapeseed production 2017 ( 1000 t ) (f'cast.)**



Calculations and cartography: European Commission DG AGRI 04 2017-09-21 © EuroGeographics for the administrative boundaries

# EU Rapeseed

Rapeseed						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 August 2017	2017/18 September 2017	%change 2016/17	%change 5yrs trimmed
TOTAL EU	20.96	20.10	21.86	22.29	10.9	6.3
France	5.18	4.74	5.23	5.48	15.6	5.8
Germany	5.21	4.58	4.70	4.71	2.8	-9.6
Poland	2.53	2.22	2.71	2.66	19.9	5.1
UK	2.38	1.78	1.90	1.89	6.6	-20.4
Czech Republic	1.35	1.36	1.25	1.25	-8.0	-7.6
Romania	0.88	1.34	1.49	1.58	18.5	79.6
Others	3.44	4.09	4.58	4.71	15.2	37.2
Sources : DG AGRI G.4						

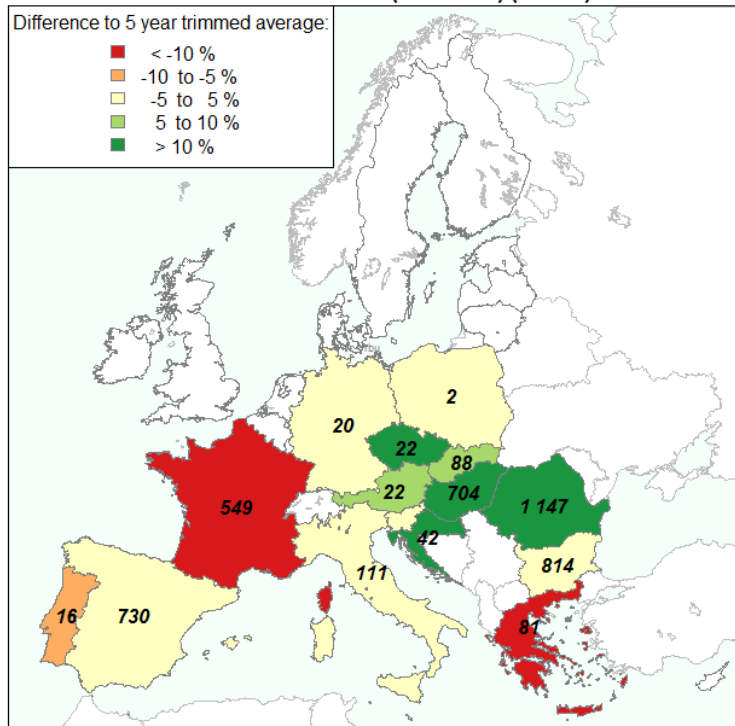




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# EU Sunflower

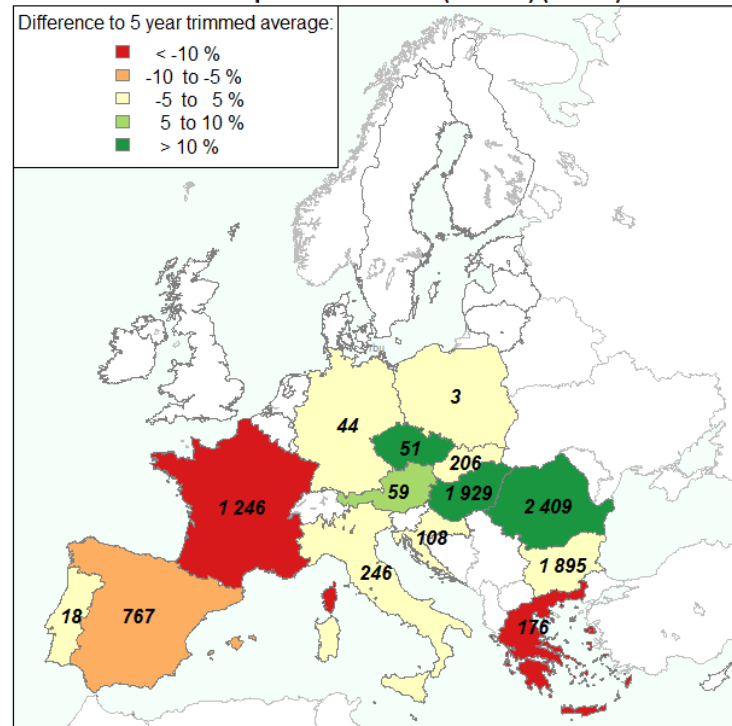
**Sunflower area 2017 ( 1000 ha ) (f'cast.)**



EU28 area : 4 348 ( 1000 ha ) Difference to 5 year trimmed average: 2 %

Calculations and cartography: European Commission DG AGRI G4 2017-09-21 © EuroGeographics for the administrative boundaries

**Sunflower production 2017 ( 1000 t ) (f'cast.)**



EU28 production : 9 158 ( 1000 t ) Difference to 5 year trimmed average: 7 %

Calculations and cartography: European Commission DG AGRI G4 2017-09-21 © EuroGeographics for the administrative boundaries



# EU Sunflower

Sunflower						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 August 2017	2017/18 September 2017	%change 2016/17	%change 5yrs trimmed
TOTAL EU	8.54	8.46	8.69	9.16	8.2	7.3
Romania	1.96	1.95	1.92	2.41	23.3	22.9
Bulgaria	1.82	1.80	1.94	1.90	5.3	3.9
Spain	0.81	0.71	0.77	0.77	7.5	-5.5
France	1.44	1.08	1.25	1.25	15.8	-13.5
Hungary	1.55	1.89	1.82	1.93	1.9	24.8
Others	0.95	1.03	0.99	0.91	-11.3	-4.5
Sources : DG AGRI G.4						



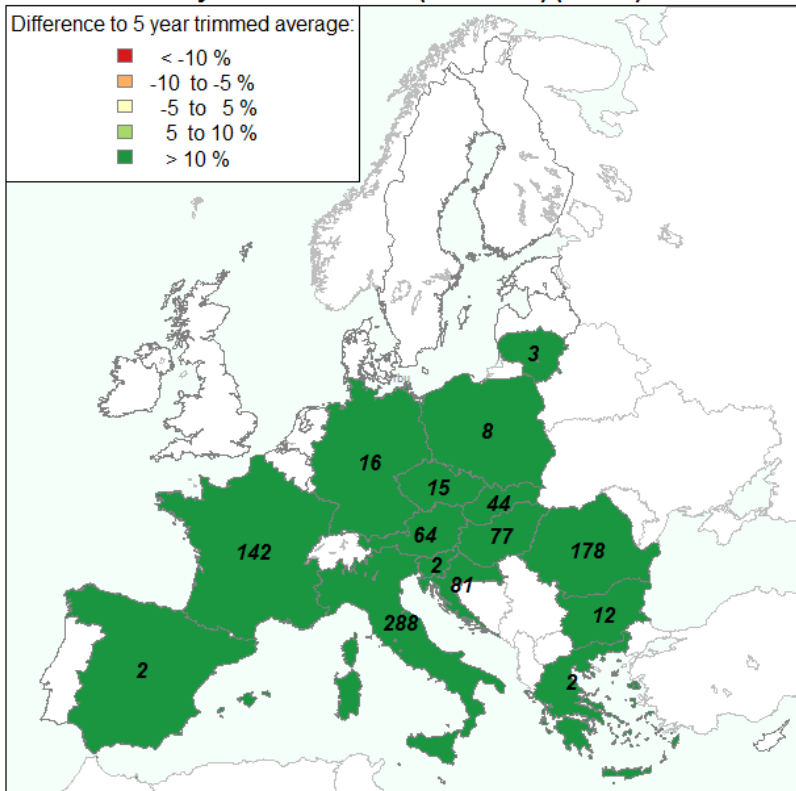
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# EU Soybeans

**Soybeans area 2017 ( 1 000 ha ) (f'cast.)**

Difference to 5 year trimmed average:

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



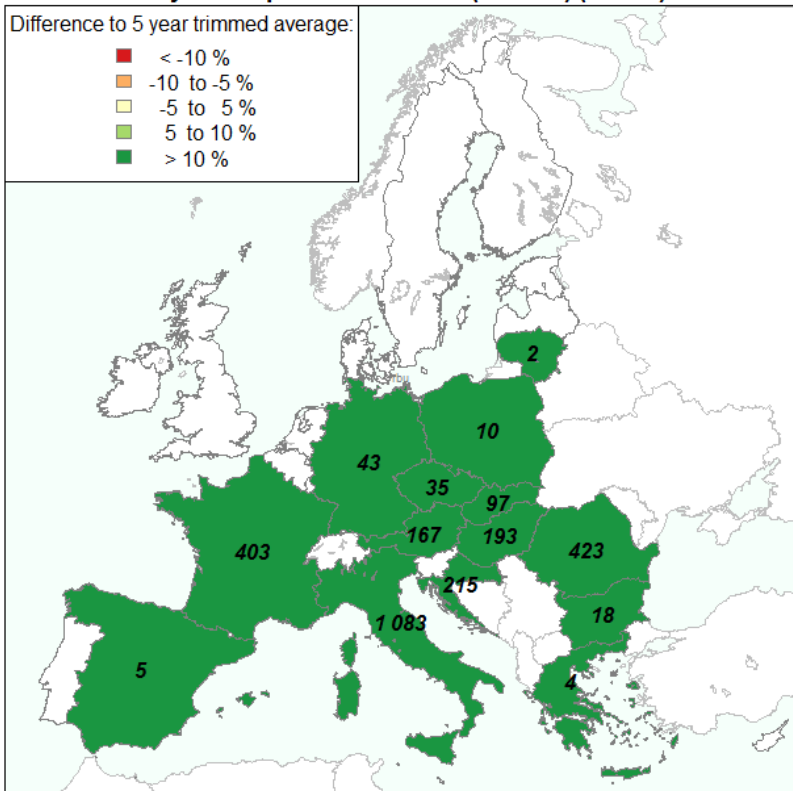
Calculations and cartography: European Commission DG AGRI C4 2017.09.21 © EuroGeographics for the administrative boundaries

EU28 area : 934 ( 1000 ha ) Difference to 5 year trimmed average: 50 %

**Soybeans production 2017 ( 1000 t ) (f'cast.)**

Difference to 5 year trimmed average:

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



Calculations and cartography: European Commission DG AGRI C4 2017.09.21 © EuroGeographics for the administrative boundaries

EU28 production : 2 700 ( 1000 t ) Difference to 5 year trimmed average: 49 %

# EU Soybeans

Soya						
Production Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 August 2017	2017/18 September 2017	%change 2016/17	%change 5yrs trimmed
TOTAL EU	1.81	2.49	2.59	2.70	8.5	49.4
Italy	0.88	1.08	1.08	1.08	0.2	23.2
Romania	0.20	0.26	0.35	0.42	61.6	106.6
France	0.22	0.36	0.40	0.40	12.6	81.2
Croatia	0.15	0.24	0.21	0.21	-10.1	46.7
Hungary	0.11	0.18	0.17	0.19	6.7	70.5
Austria	0.12	0.15	0.17	0.17	9.8	40.2
Others	0.12	0.21	0.22	0.21	0.0	77.5
Sources : DG AGRI G.4						



## Key messages - oilseeds

High level of total production at 34.3m t (+9% vs average)  
> result of higher area & better yields

Crops:

Rapeseed at 22.3m t (+11% y/y) – second highest level  
FR: +16%; PL: +20%; RO: +18%

Sunflower at 9.2m t (+8 % y/y) – close to record level  
RO: +23%; BG: +5%; ES: +7%; FR: +16%

Soyabeans at 2.7m t (+13% y/y) – record level  
IT: +0%; RO: +62%; FR: +13%

# EU Protein crops

## EU PROTEIN CROPS AREA

Million ha	AVG 5 yrs trimmed	2016/17	2017/18 August 2017	2017/18 September 2017	%change 2016/17	%change 5yrs trimmed
Field peas	0.6	0.9	1.0	1.0	9.8	68.2
Broad beans	0.5	0.7	0.6	0.7	2.4	46.2
Sweet lupins	0.1	0.2	0.2	0.2	1.7	39.1
<b>TOTAL</b>	<b>1.2</b>	<b>1.8</b>	<b>1.8</b>	<b>1.9</b>	<b>6.2</b>	<b>56.5</b>

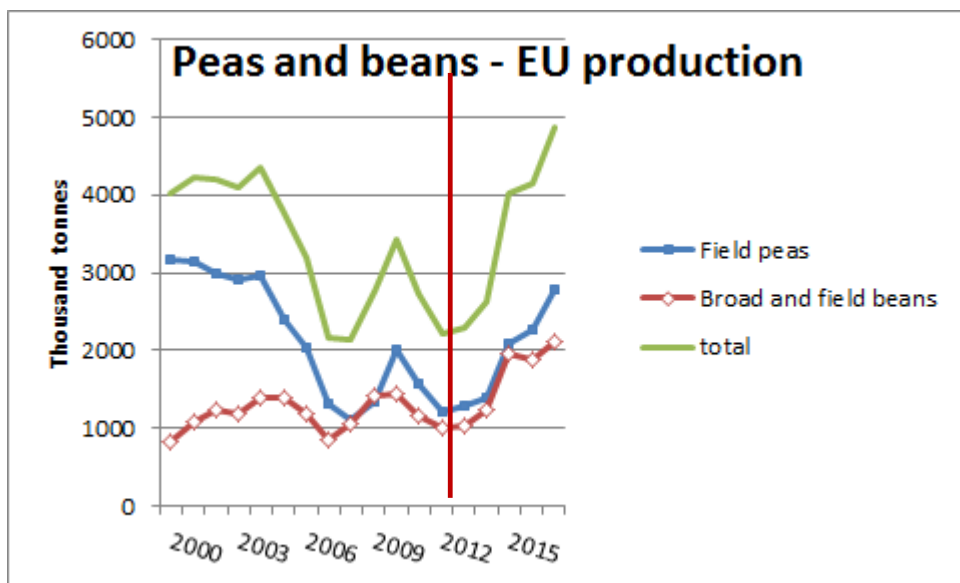
Sources : DG AGRI G.4

## EU PROTEIN CROPS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 August 2017	2017/18 September 2017	%change 2016/17	%change 5yrs trimmed
Field peas	1.6	2.3	2.7	2.8	23.0	75.8
Broad beans	1.4	1.9	2.0	2.1	11.3	52.0
Sweet lupins	0.2	0.3	0.3	0.3	2.4	36.3
<b>TOTAL</b>	<b>3.2</b>	<b>4.4</b>	<b>5.0</b>	<b>5.2</b>	<b>16.7</b>	<b>62.8</b>

Sources : DG AGRI G.4

## Key messages



Continuous increase of production since 2013 (VCS, EFA)

Production (peas & beans) in 1993 : 6.3m t



**Thank you for your attention!**

**Presentations & Balance sheets  
available at:**

**[http://ec.europa.eu/agriculture/cereals/index\\_en.htm](http://ec.europa.eu/agriculture/cereals/index_en.htm)**