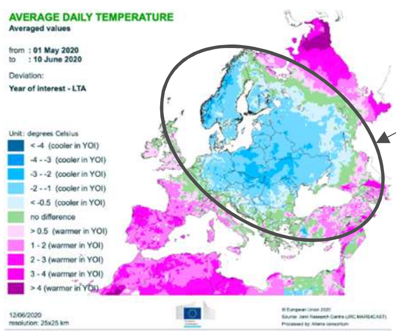
Cereals, Oilseeds and Proteins

Market Situation

CROPS Market Observatory

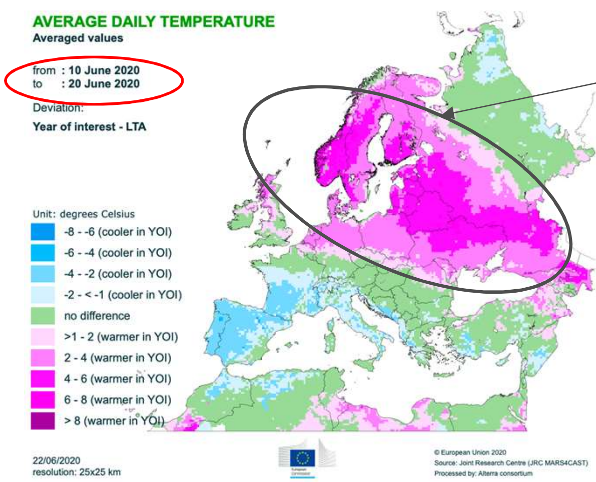
1 July 2020

Agrometeorological overview (I)



JRC Bulletin 1 May - 10 June

- **cold** in central, eastern and northern Europe
  - slowed down phenological development of winter crops (beneficial in areas with water stress)

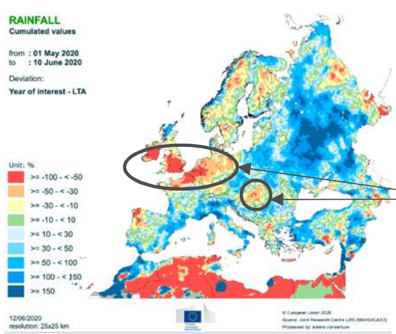


JRC ad-hoc update 10 June – 20 June

- **warm** conditions in eastern and northern Europe (+ 2-6 °C LTA)
  - temperatures well above 30 °C in central and eastern Europe

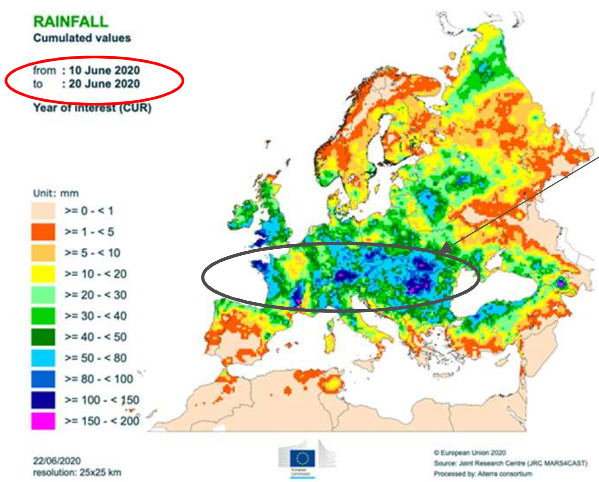
European Commission

Agrometeorological overview (II)



JRC Bulletin 1 May - 10 June

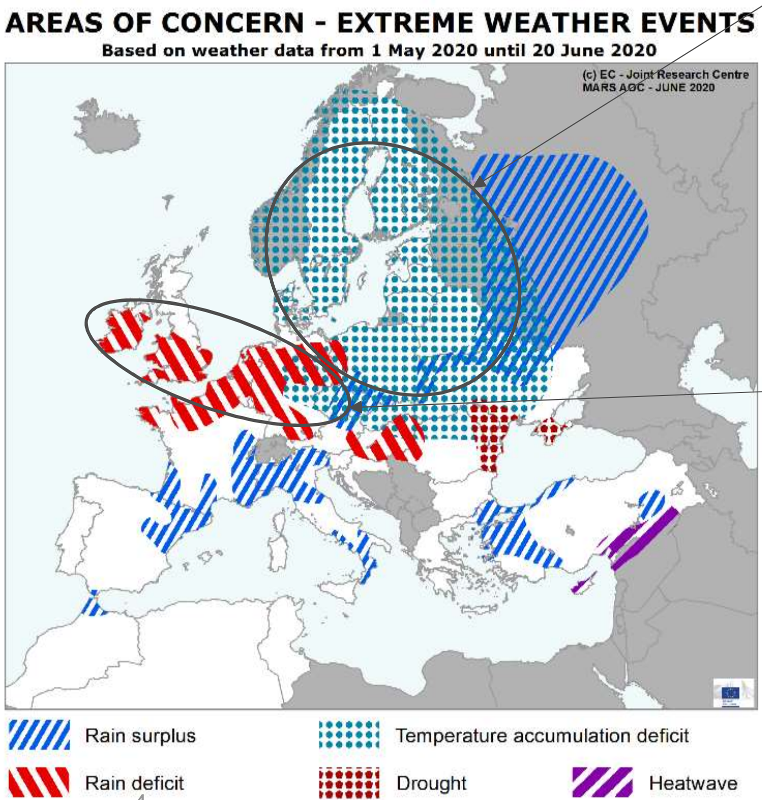
- **beneficial rains** improved long-term water balance in many central and eastern regions
- dry conditions prevailed in **IE**, northern **FR**, **BE**, **NL**, **DE**, **HU**, and **rain deficit deepened**



JRC ad-hoc update 10 June – 20 June

- **substantial rains** in large areas of central and south-eastern Europe (in particular western and southern FR, southern DE, western RO)
  - side effect: distinct **deficit of solar radiation** in RO and parts of central Europe

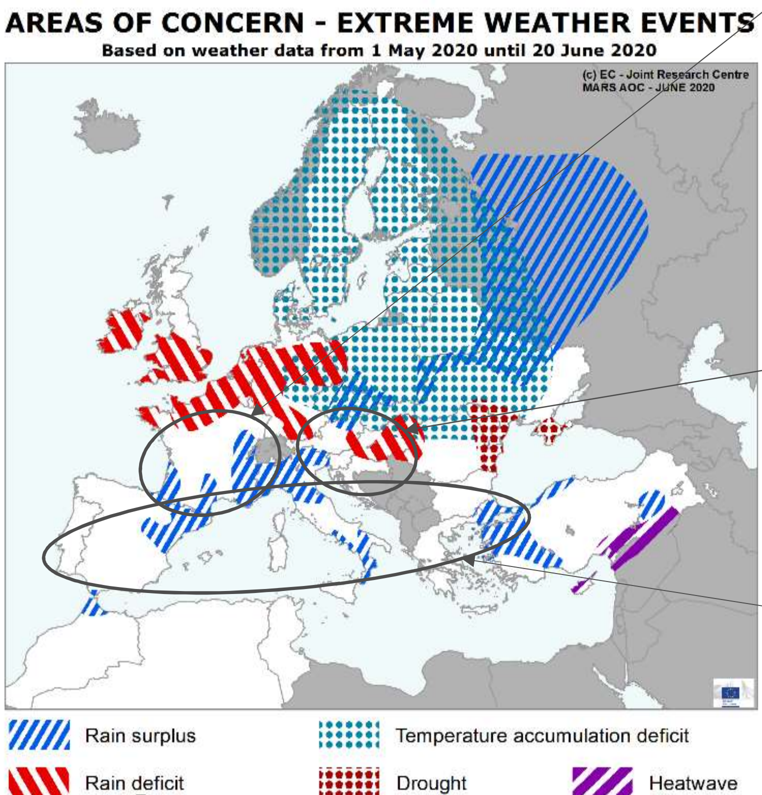
Extreme weather events, Areas of concern (I)



- No negative impact by cold conditions experienced in May in northern Europe. Warm conditions experienced since then in **DK**, **SE**, **FI**, **PL**, **EE**, **LV**, **LT** has sustained a positive outlook for crops (except in north-western PL, where dry conditions had negatively affected winter and spring crops).
- Dry conditions until end of May or beginning of June negatively impacted winter crops (as in flowering or early grain filling periods) in **IE**, northern **FR**, **BE**, **NL**, **DE**, and growth of summer and spring crops in northern **FR**, **BE**, **NL**, and most eastern parts of **DE**.
- Substantial rainfall afterwards has reduced soil moisture deficits (but still below average), benefiting summer crops and preventing further losses in winter and spring crops. Some damage by heavy showers and thunderstorms.

European Commission

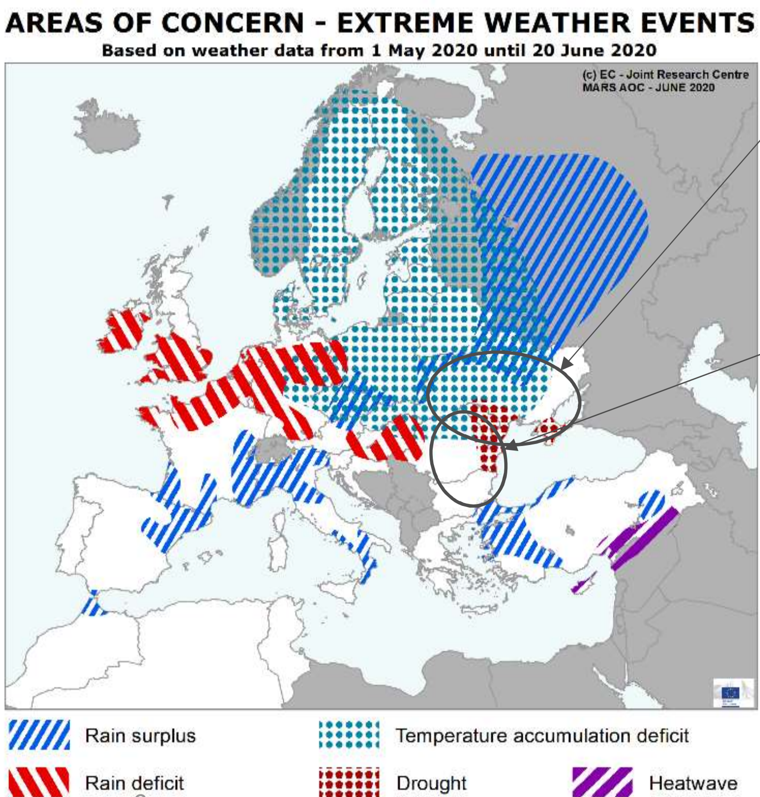
Extreme weather events, Areas of concern (II)



- Substantial rainfall and around-average temperatures in almost all regions in **FR** were beneficial for crops. Too late for winter crops to recover (though further losses have been limited), and summer crops are overall in good condition.
- Significant rain deficit in May negatively impacted winter crops in **HU**. Rains in June arrived too late, as well as in western **CZ**, south-western **SK**, and **SI**, and has increased pest and disease pressure. Heavy storms caused local damage, especially in HU. Outlook for winter cereals in **HR** partly improved.
- Substantial rainfall sustained positive conditions for summer crops.
- Beneficial rain surplus in **EU Mediterranean regions**, favourable conditions for crops.

European Commission

Extreme weather events, Areas of concern (III)



- Long rain deficit (March, April) negatively impacted winter crops in **Ukraine**. Abundant rainfall and radiation deficit during flowering in central regions has slightly worsened conditions thereafter, increasing disease pressure too. Conditions for summer crops are positive.
- Drought conditions prevailed in **eastern RO**, which finish the season in poor conditions. Excessive rainfall in the rest of **RO** and northern **BG** can cause further losses to, and decrease the quality of winter cereals. Positive outlook for summer crops.

European Commission

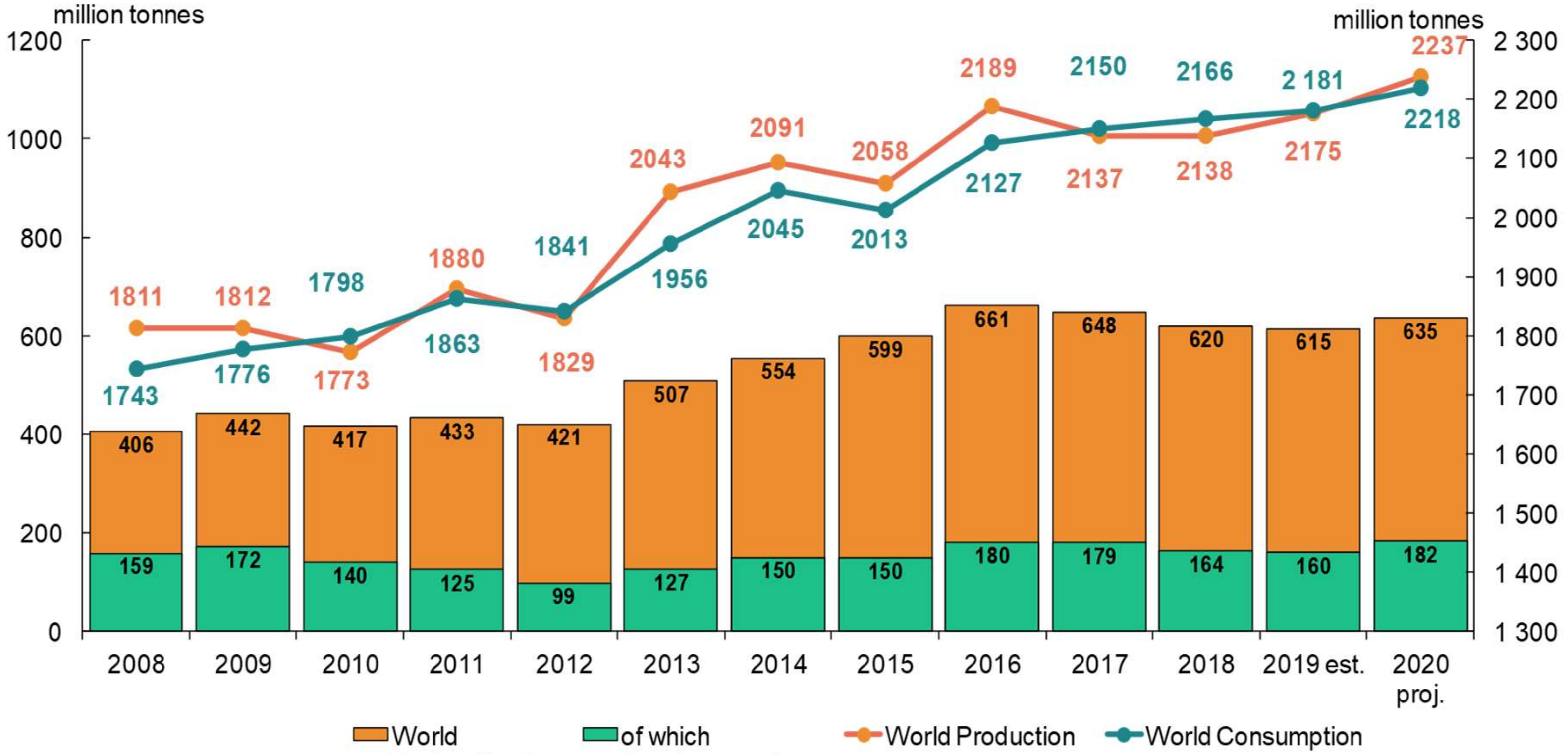
Market situation

- Cereals
- Oilseeds
- Proteins

- Cereals

- World Cereals market

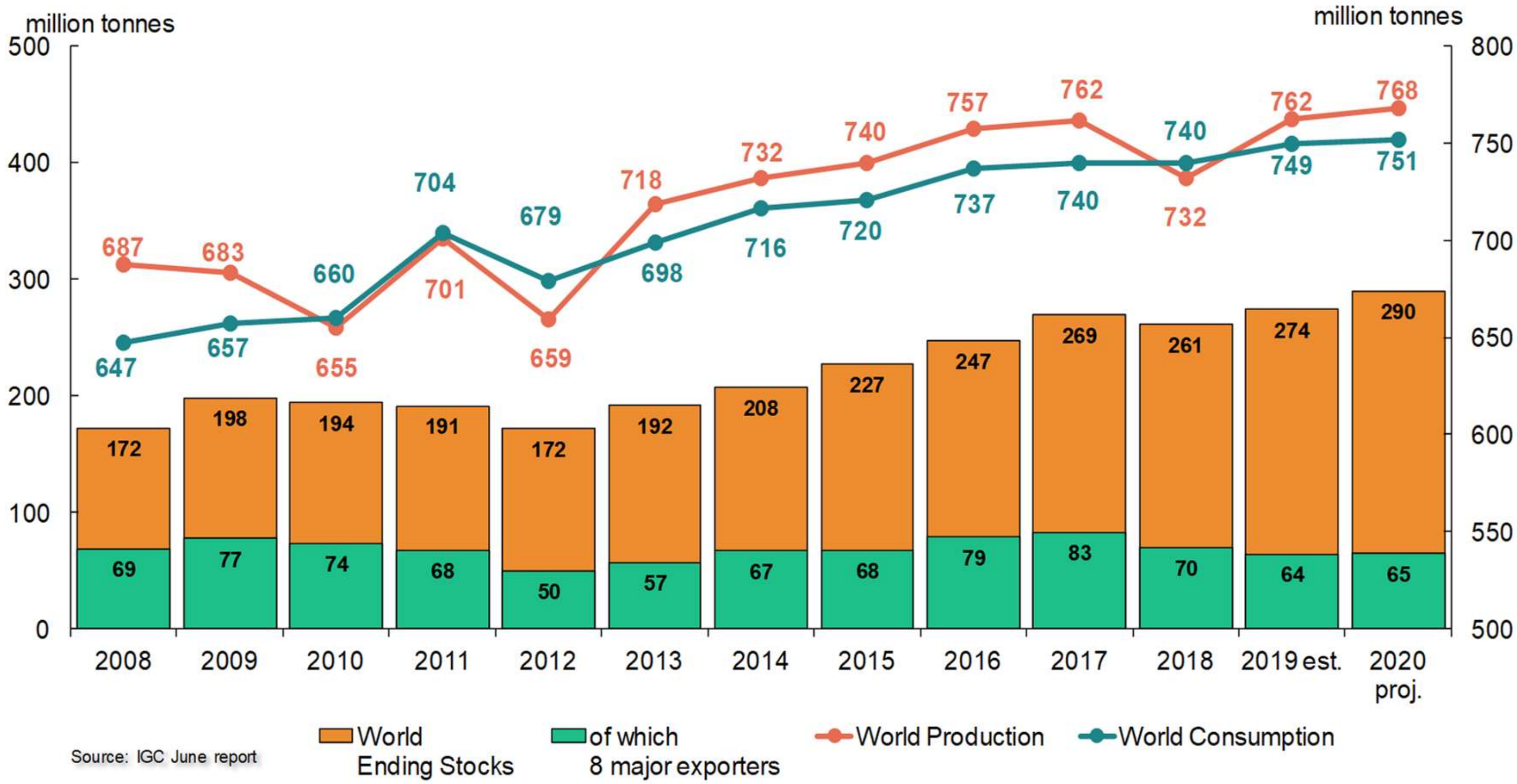
World cereals: IGC



Source: IGC June report

European Commission

World wheat: IGC



Source: IGC June report

Summary of the IGC Grain Market Report

(GMR 511 of 25/06/2020)

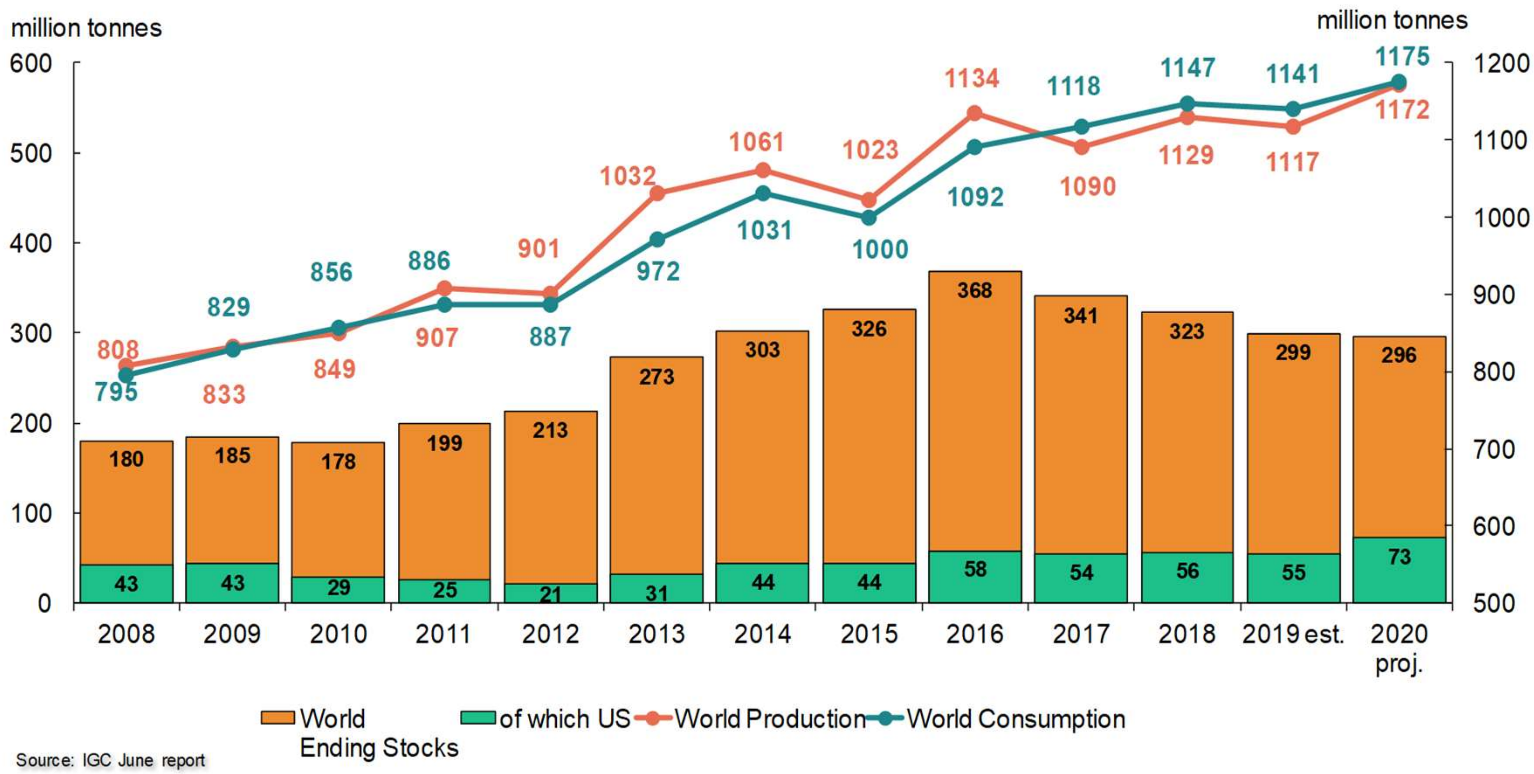
Outlook for 2020/21

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

	2017/18	2018/19 *(estimate)*	2019/20 *(forecast)*	2020/21 *(projection)*	*m/m change (m t)*	y/y change
EU-27 **(2020/21)** ***EU-27 + UK to 2019/20***	151.4	137.7	155.0	**128.4**	*-3.2*	-7.4% change on EU27 basis
USA	47.4	51.3	52.3	**51.1**	*+0.7*	-2.2%
Canada	30.4	32.2	32.3	**34.0**	-	+5.1%
Russia	85.1	71.7	73.6	**79.0**	-	+7.4%
Ukraine	27.0	25.1	29.2	**26.5**	-	-9.2%
Australia	20.9	17.6	15.2	**26.2**	*+2.2*	+72.8%
China	134.3	131.4	133.6	**135.0**	*+1.0*	+1.1%
India	98.5	99.7	103.6	**107.2**	*+0.2*	+3.5%
World	**761.7**	**731.7**	**761.9**	**767.6**	***+1.5***	**+0.8%**

European Commission

World maize: IGC



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019 est.	2020 proj.
World Ending Stocks	180	185	178	199	213	273	303	326	368	341	323	299	296
of which US	43	43	29	25	21	31	44	44	58	54	56	55	73
World Production	808	833	849	907	901	1032	1061	1023	1134	1090	1129	1117	1172
World Consumption	795	829	856	886	887	972	1031	1000	1092	1118	1147	1141	1175

European Commission

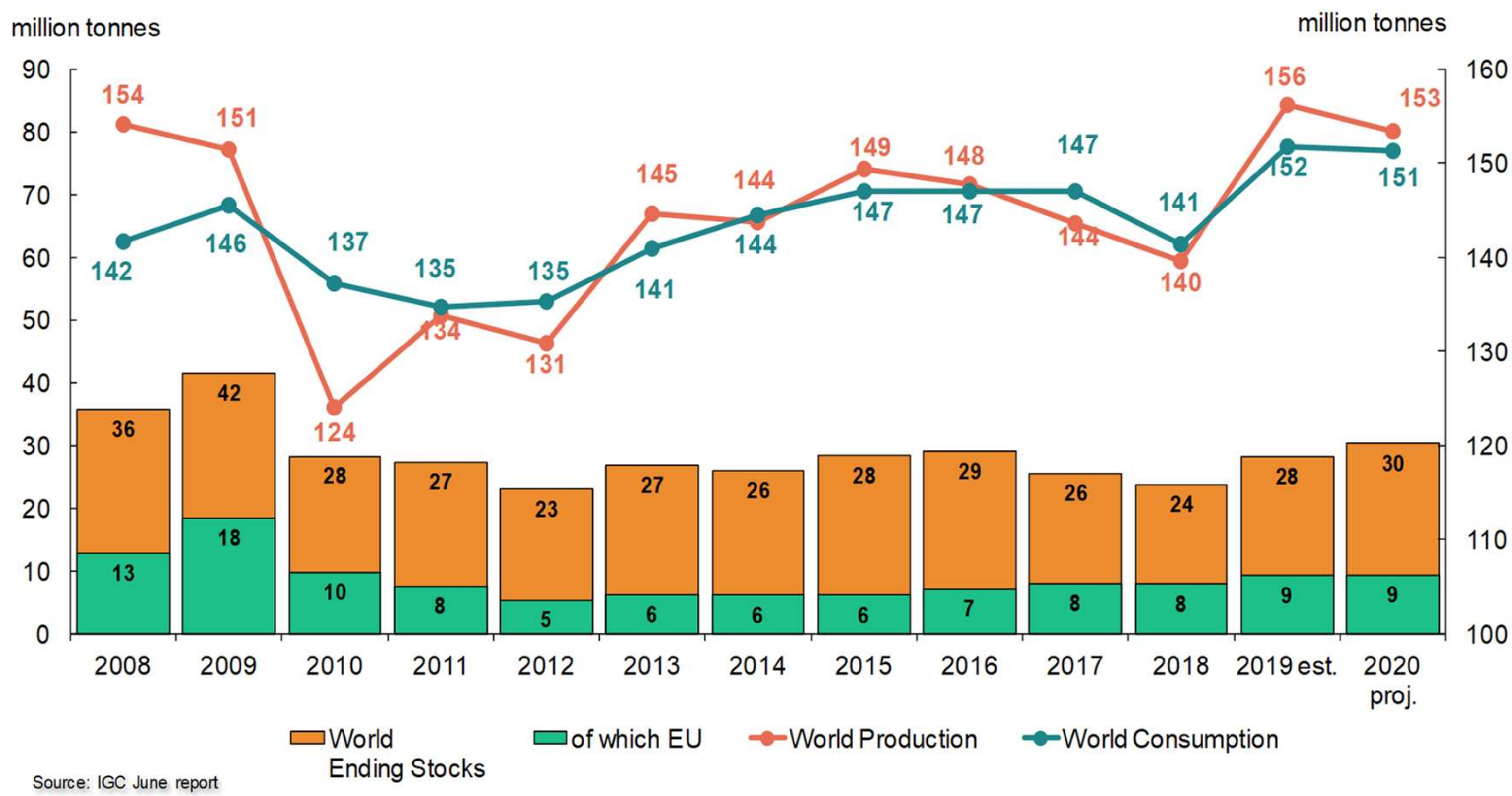
Summary of the IGC Grain Market Report
(GMR 511 of 25/06/2020)
Outlook for 2020/21

Maize production in selected countries (million tonnes)

	2017/18	2018/19 (estimate)	2019/20 (forecast)	2020/21 (forecast)	m/m change (m t)	y/y change
EU-27 (2020/21) *EU-27 + UK to 2019/20*	64.8	67.0	68.1	**68.9**	*+0.5*	+1.2 % on EU-27 basis
USA	371.1	364.3	345.9	**392.5**	-	+13.5 %
Ukraine	24.1	35.8	35.9	**34.5**	-	-3.9 %
Russia	13.2	11.4	14.3	**15.5**	*+1.5*	+8.6%
Brazil	80.8	100.0	100.4	**106.3**	*+0.8*	+5.9 %
Argentina	43.5	56.9	55.5	**52.1**	-	-6.1 %
China	259.1	257.3	260.8	**261.0**	-	+0.1 %
World	**1,090.2**	**1,128.9**	**1,116.9**	**1,171.6**	***+3.0***	**+4.9 %**

European Commission

World barley: IGC



European Commission

Summary of the IGC Grain Market Report
(GMR 511 of 25/06/2020)
Outlook for 2020/21

Barley production in selected countries (million tonnes)

	2017/18	2018/19 *(estimate)*	2019/20 *(forecast)*	2020/21 *(projection)*	*m/m change (m t)*	y/y change
EU-27 **(2020/21)** ***EU-27 + UK to 2019/20***	58.6	56.3	63.4	**55.2**	*+1.1*	-0.1% on EU-27 basis
United Kingdom	7.2	6.6	8.2	**8.0**	*-0.2*	-2.2%
Russia	20.2	16.7	19.9	**19.2**	-	-3.6%
Ukraine	8.7	7.6	9.5	**7.9**	-	-17.1%
Australia	9.3	8.8	9.0	**10.3**	*+0.9*	+14.4%
Canada	7.9	8.4	10.4	**9.7**	-	-6.6%
Turkey	7.1	7.0	7.6	**8.3**	*+0.4*	+8.7%
World	**143.5**	**139.5**	**156.2**	**153.4**	**+2.2**	**-1.8%**

- EU Cereals (2019/20 Marketing Year)

EU+UK Cereals Balance Sheet

EU+UK **EU+UK**

CEREALS SUPPLY & DEMAND ***(thousand metric tonnes)***

	2019/20 (forecast)									
LAST UPDATED: 25/06/2020	**Common wheat**	**Barley**	**Durum wheat**	**Maize**	**Rye**	**Sorghum**	**Oats**	**Triticale**	**Others**	**TOTAL CEREALS**
Beginning stocks	**11.670**	**5.205**	**2.303**	**24.985**	**204**	**641**	**200**	**1.083**	**147**	**46.438**
Usable production	146.971	63.091	7.491	70.053	8.334	968	7.848	11.044	3.752	319.551
Area (thousand ha)	*23.811*	*12.282*	*2.188*	*8.906*	*2.222*	*197*	*2.550*	*2.765*	*1.462*	*56.382*
Yield (tonnes/ha)	*6*	*5*	*3*	*8*	*4*	*5*	*3*	*4*	*3*	*6*
Imports (from third countries)	2.100	600	2.000	20.000	10	80	4		154	24.949
Total supply	**160.741**	**68.896**	**11.794**	**115.038**	**8.548**	**1.689**	**8.053**	**12.127**	**4.053**	**390.938**
Total domestic use										
Human consumption	47.147	363	8.071	4.881	3.069	156	1.152	52	23	64.913
Seed	4.874	2.173	407	433	457	42	428	544	270	9.627
Industrial uses	10.900	8.700	95	12.000	1.311		103	449	202	33.760
of which bioethanol/biofuel	*4.300*	*437*		*6.256*	*700*			*344*	*14*	*12.051*
Animal feed	49.800	37.200	400	68.500	2.500	450	5.700	8.700	3.300	176.550
Losses	900	400	40	600	70		70	90	40	2.210
Exports (to third countries)	33.000	10.500	1.200	4.700	250	4	200	2	8	49.865
Total use	**146.621**	**59.337**	**10.213**	**91.114**	**7.657**	**652**	**7.652**	**9.837**	**3.843**	**336.925**
Ending stocks**	**14.120**	**9.559**	**1.581**	**23.924**	**891**	**1.037**	**401**	**2.291**	**210**	**54.013**
Change in stocks**	2.450	4.354	-722	-1.061	687	396	200	1.207	63	7.575

* Marketing year: from July to June

** At the end of the marketing year

EU+UK Cereals Balance Sheet 2019/20

- Production forecast : above average (319,6 million tonnes, + 10,3% y/y)
  - Increase of total cereal area (56,4 million ha, +2,5% y/y)
  - Recovery of soft wheat and barley production
  - Good quality milling wheat at EU level
- Decrease of maize imports
- Recovery of total exports, in particular for soft wheat and barley
- Increase of total ending stocks

European Commission

EU Cereals Balance Sheet

EU **EU**

CEREALS SUPPLY & DEMAND *(thousand metric tonnes)*

last updated: 25/06/2020	2019/20 (forecast)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**6.475**	**3.198**	**2.959**	**24.192**	**174**	**1.367**	**146**	**301**	**88**	**38.900**
Usable production	130.873	55.111	7.491	70.018	8.261	968	6.784	10.987	3.752	294.245
Area (thousand ha)	*21.995*	*11.120*	*2.188*	*8.899*	*2.190*	*197*	*2.368*	*2.752*	*1.462*	*53.171*
Yield (tonnes/ha)	*6*	*5*	*3*	*8*	*4*	*5*	*3*	*4*	*3*	*6*
Imports (from third countries)	2.700	2.000	2.200	19.400	20	50	90	0	100	26.560
Total supply	**140.048**	**60.309**	**12.651**	**113.610**	**8.455**	**2.384**	**7.020**	**11.288**	**3.940**	**359.706**
Total domestic use	98.502	43.623	9.011	83.220	7.245	639	6.480	8.762	3.785	261.268
Human consumption	40.500	361	8.071	4.698	3.000	155	989	52	23	57.848
Seed	4.600	2.131	400	402	395	29	350	500	270	9.076
Industrial uses	9.717	6.700	95	11.100	1.300	0	101	445	170	29.628
of which bioethanol/biofuel	*(3 740)*	*(437)*	*(0)*	*(6 164)*	*(700)*	*(0)*	*(0)*	*(344)*	*(14)*	*(11 398)*
Animal feed	42.900	34.100	400	66.600	2.500	450	5.000	7.700	3.300	162.950
Losses	785	331	45	420	50	6	41	66	23	1.765
Exports (to third countries)	34.000	10.100	1.300	5.900	300	13	200	14	17	51.844
Total use	**132.502**	**53.723**	**10.311**	**89.120**	**7.545**	**652**	**6.680**	**8.776**	**3.802**	**313.111**
Ending stocks**	**7.546**	**6.586**	**2.339**	**24.490**	**910**	**1.732**	**340**	**2.512**	**138**	**46.594**
Change in stocks**	1.071	3.388	-620	298	736	366	194	2.211	50	7.694

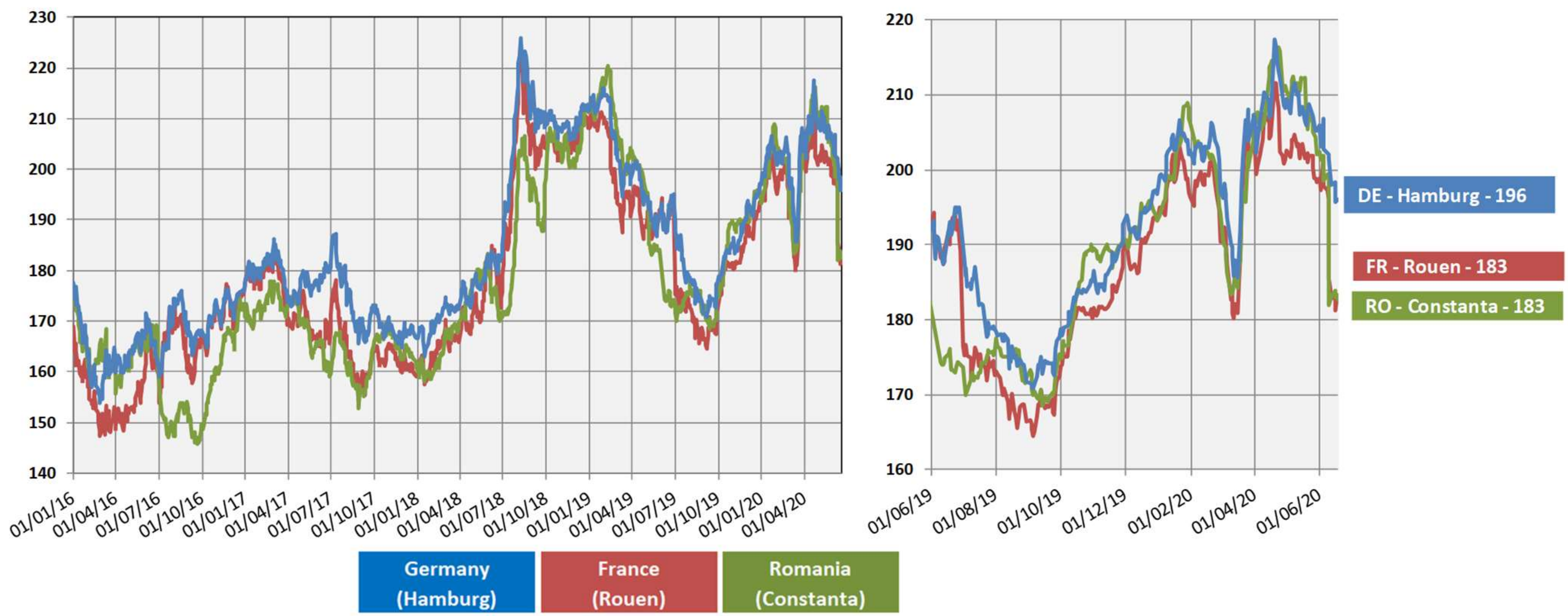
* Marketing year: from July to June

** At the end of the marketing year

European Commission

- Cereals (Prices)

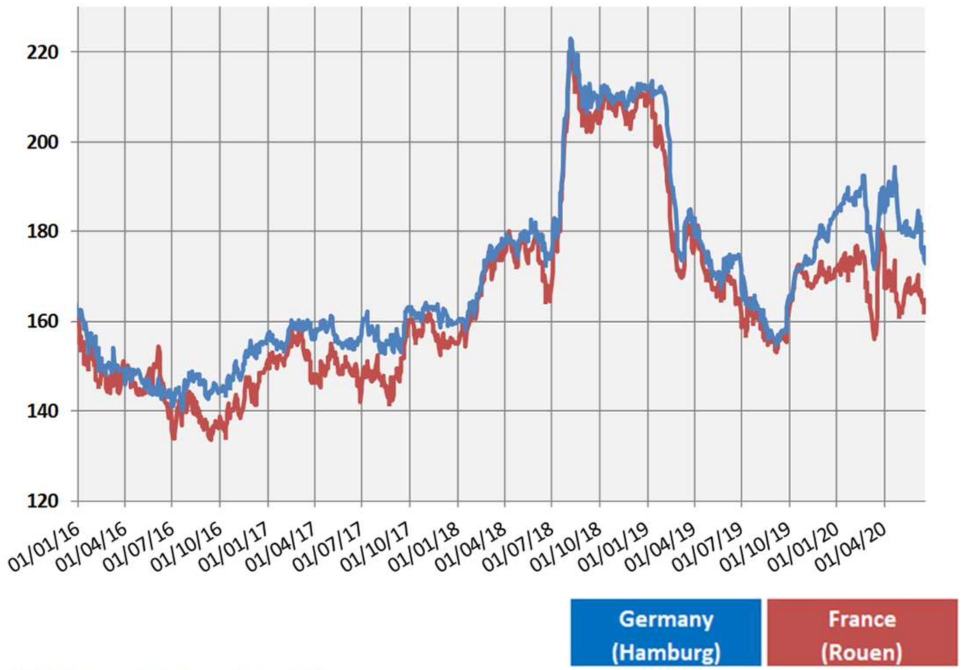
EU market prices for milling wheat – (EUR/tonne)

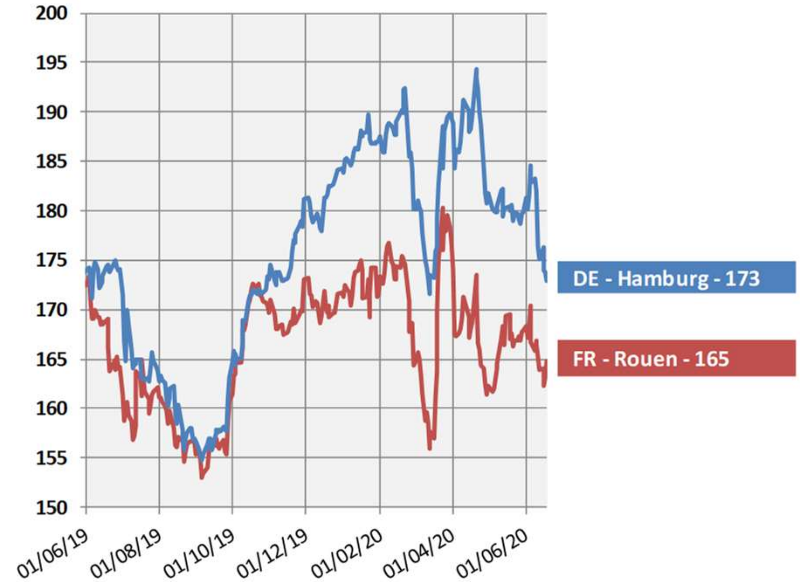


Source: International Grains Council

European Commission

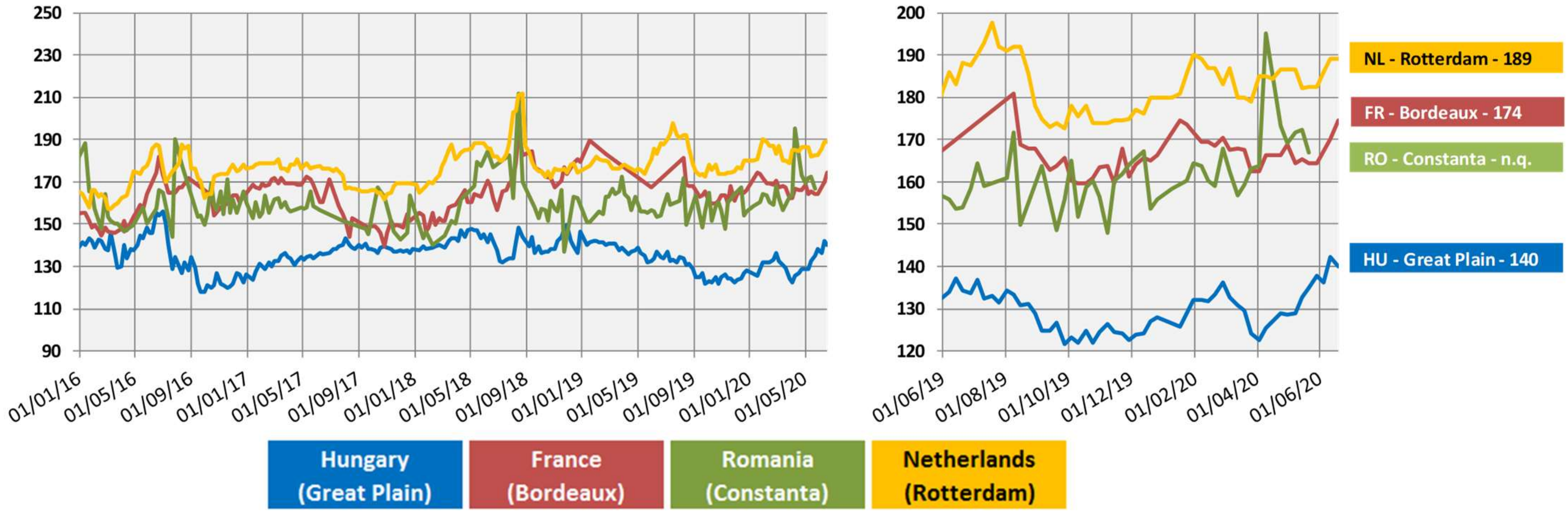
EU market prices for feed barley – (EUR/tonne)





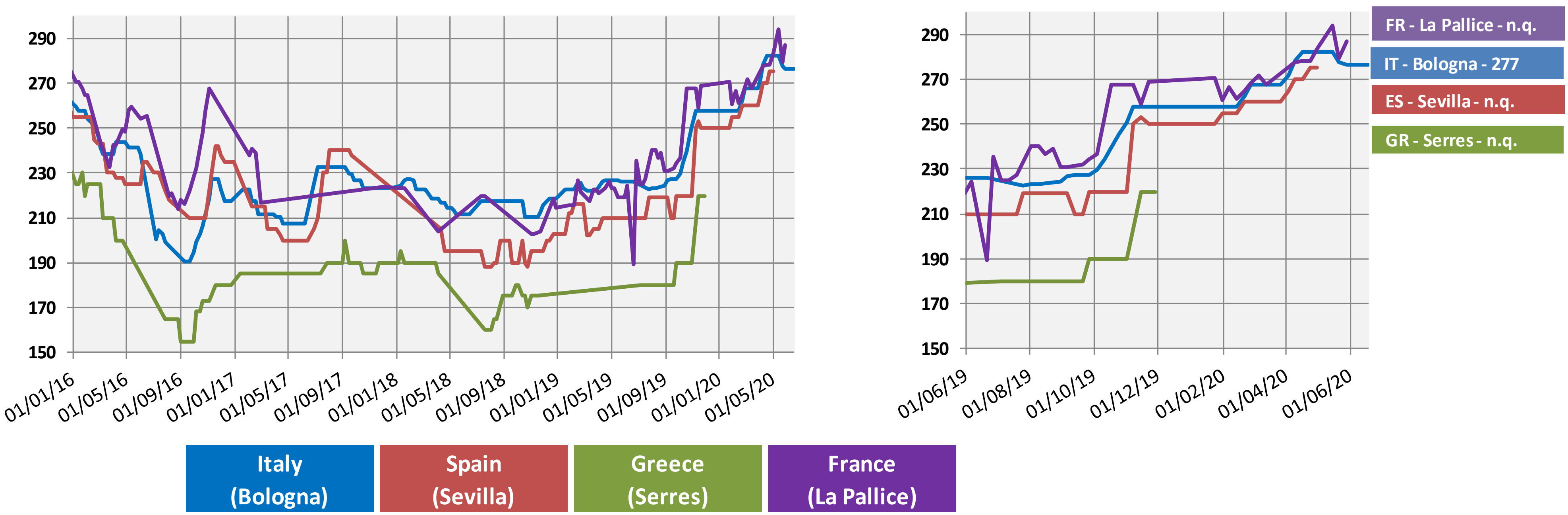
Source: International Grains Council

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)



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

European Commission

EU market prices

- Milling wheat: Fob Rouen 183 EUR/tonne (-8% m/m and - 4% y/y)
- Feed barley : Delivered Rouen 165 EUR/tonne (stable m/m and – 10% y/y)
- Maize : Fob Bordeaux 174 EUR/tonne (+ 8% m/m and – 4 % y/y)
- Durum wheat: 277 EUR/tonne delivered Bologna (-2% m/m and + 30 % y/y)

- Cereals (2020/21 Marketing Year)

EU : Area Forecasts

EVOLUTION OF THE EU 27 CEREALS AREA

(million ha)

	2018	2019	2020		
			May Forecast	June Forecast	vs. 2019/2020 (%)
Soft wheat	21,3	22,0	21,5	21,4	-2,8
Durum wheat	2,5	2,2	2,2	2,2	0,6
Barley	11,1	11,1	11,4	11,4	2,6
Maize	8,3	8,9	8,8	8,9	0,1
Rye	1,9	2,2	2,3	2,3	4,0
Oats	2,6	2,4	2,5	2,6	8,0
Total	**51,9**	**53,1**	**52,8**	**53,2**	0,2

Source: DG AGRI - G4

European Commission

EU : Production Forecasts

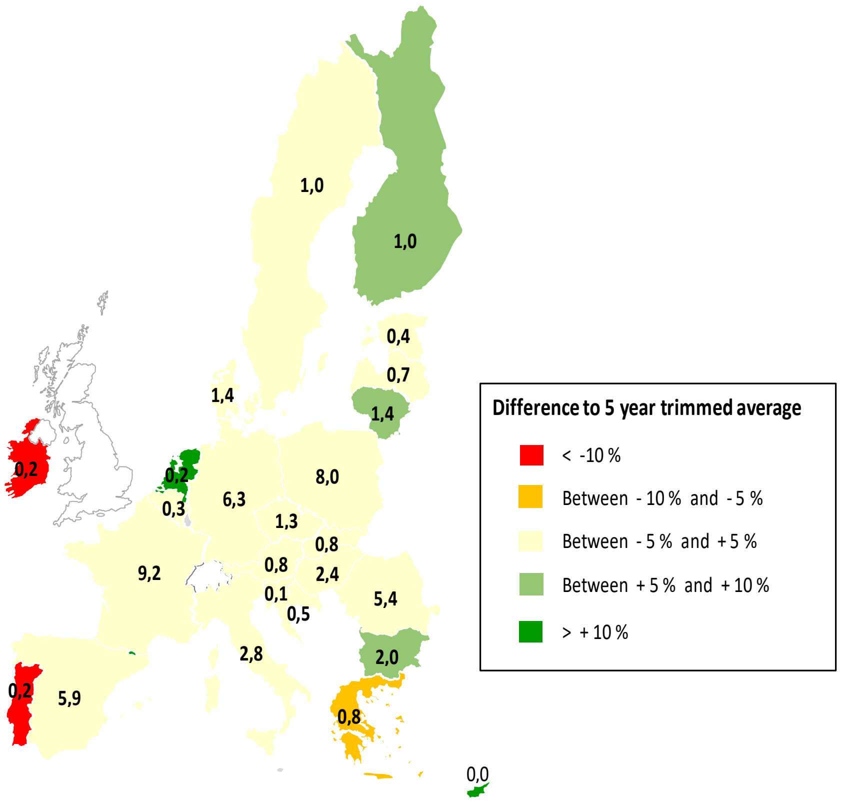
EVOLUTION OF THE EU 27 CEREALS USABLE PRODUCTION

(million tonnes)

	2018/19	2019/20	2020/21		
			May Forecast	June Forecast	vs. 2019/2020 (%)
Soft wheat	*114,8*	*130,8*	*121,5*	*117,2*	*-10,4*
Durum wheat	*8,7*	*7,5*	*7,3*	*7,3*	*-2,7*
Barley	*49,5*	*55,1*	*56,2*	*56,1*	*1,8*
Maize	*69,0*	*70,0*	*71,4*	*71,9*	*2,7*
Rye	*6,0*	*8,3*	*8,7*	*8,6*	*3,6*
Oats	*6,8*	*6,8*	*7,2*	*7,4*	*8,8*
Total	**268,9**	**294,2**	**287,0**	**284,3**	-3,4

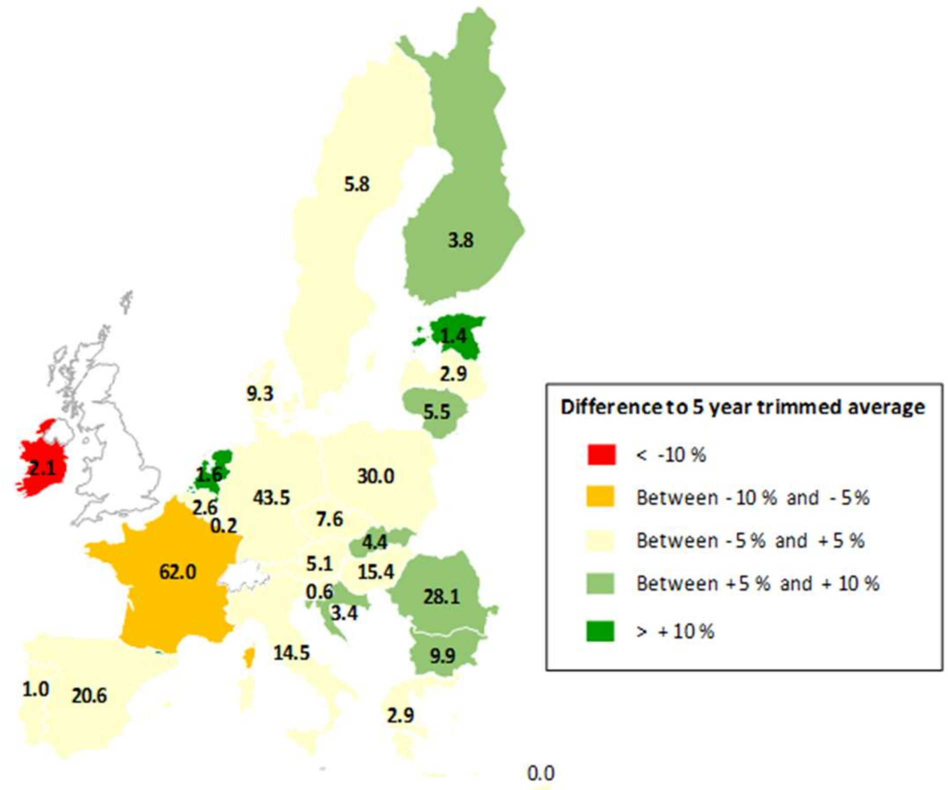
Source: DG AGRI -G4

Total cereals area - 2020 projection (million hectares)



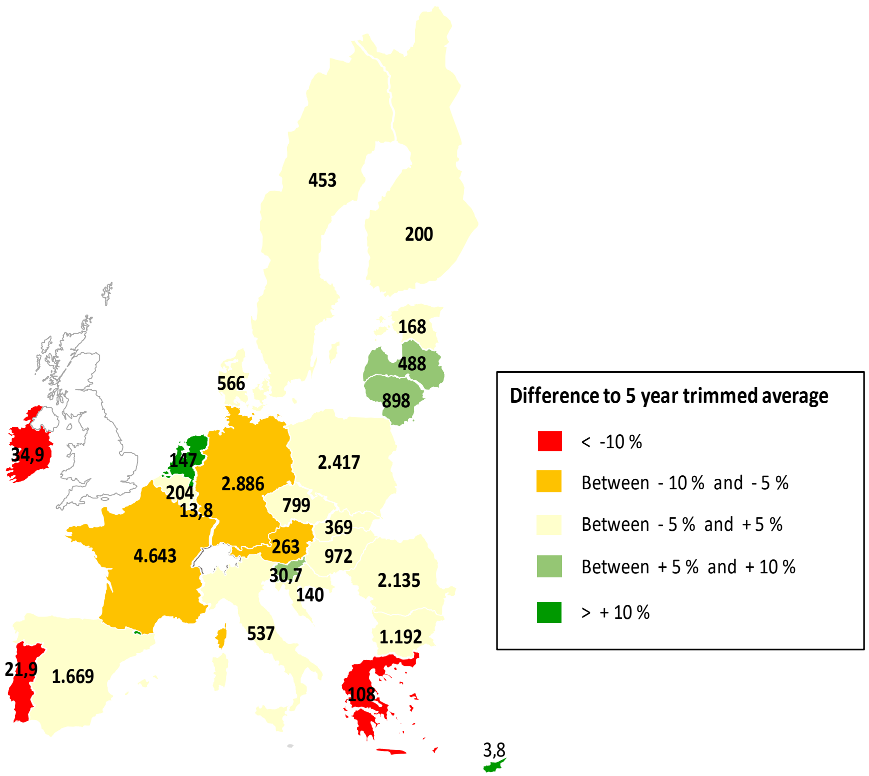
EU area: 53,2 million hectares - difference to 5 year trimmed average: +0,5%

Total cereals production - 2020 projection (million tonnes)



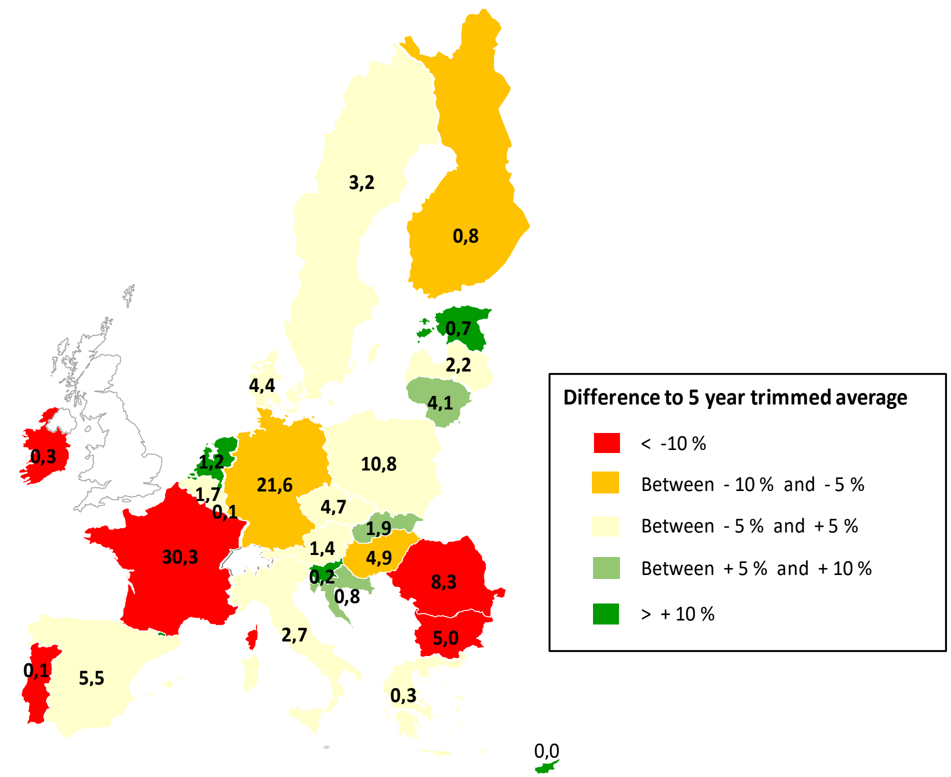
EU production: 284.3 million tonnes - difference to 5 year trimmed average: +0.9%

Soft wheat area - 2020 projection (thousand hectares)



EU area: 21 357 thousand hectares - difference to 5 year trimmed average: -2,9%

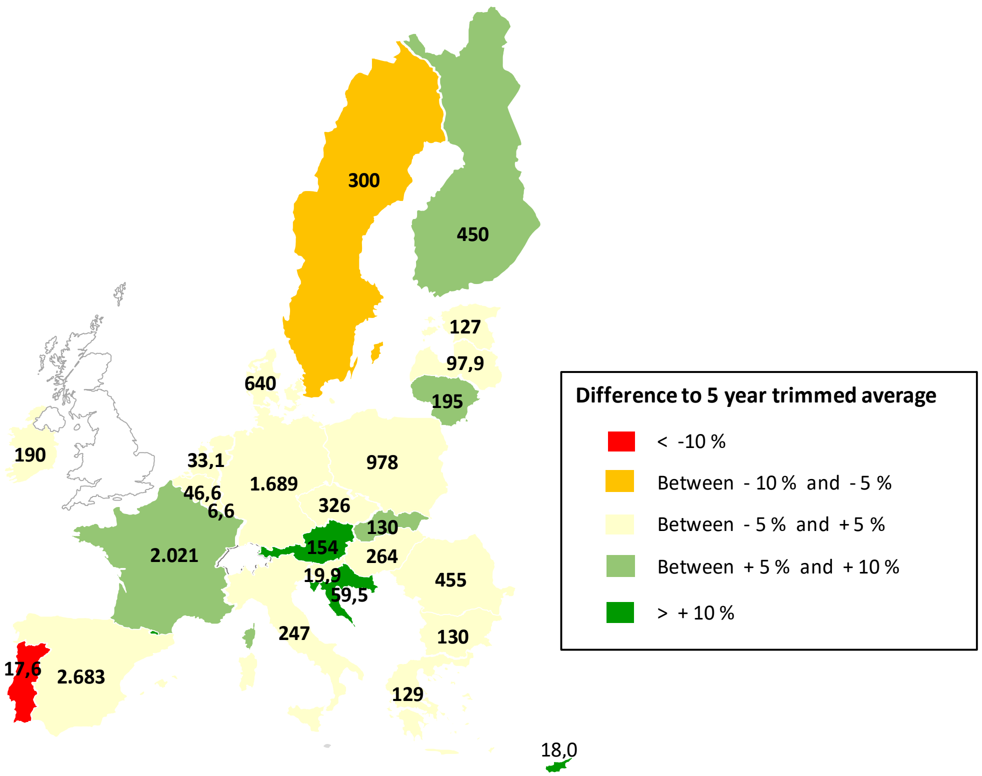
Soft wheat production - 2020 projection (million tonnes)



EU production: 117,2 million tonnes - difference to 5 year trimmed average: -7%

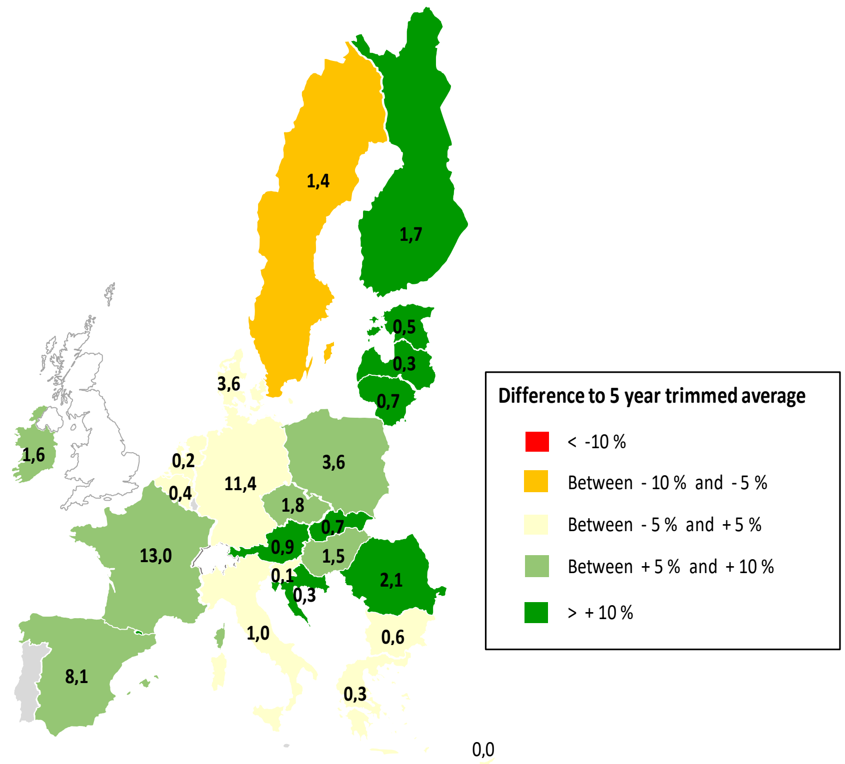
European Commission

Barley area - 2020 projection (thousand hectares)



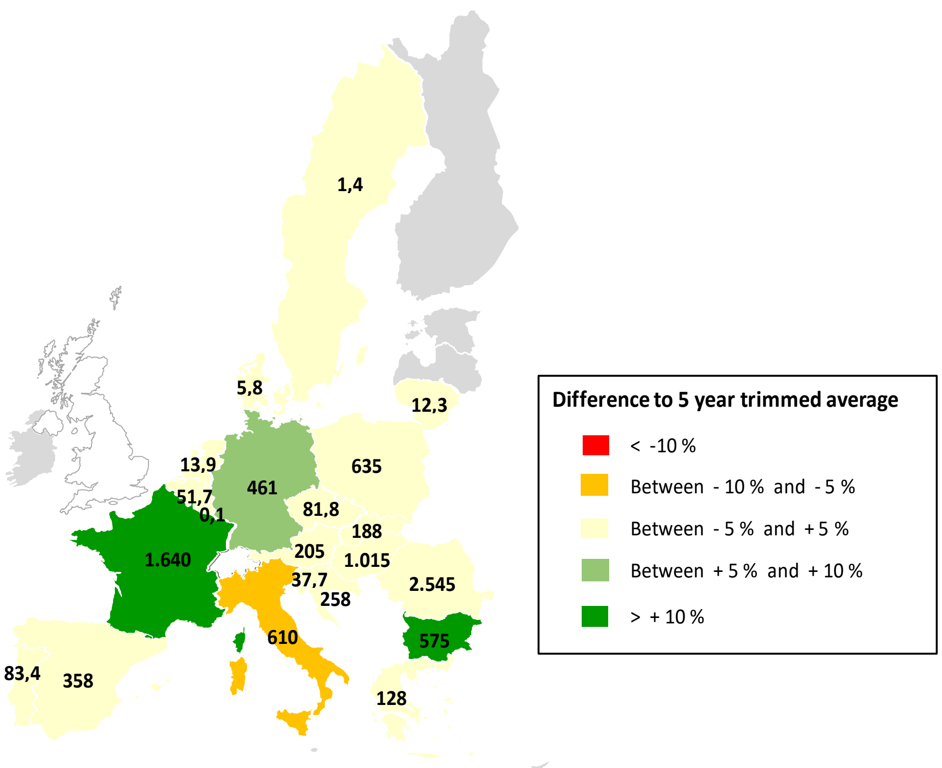
EU area: 11 407 thousand hectares - difference to 5 year trimmed average: +2,5%

Barley production - 2020 projection (million tonnes)



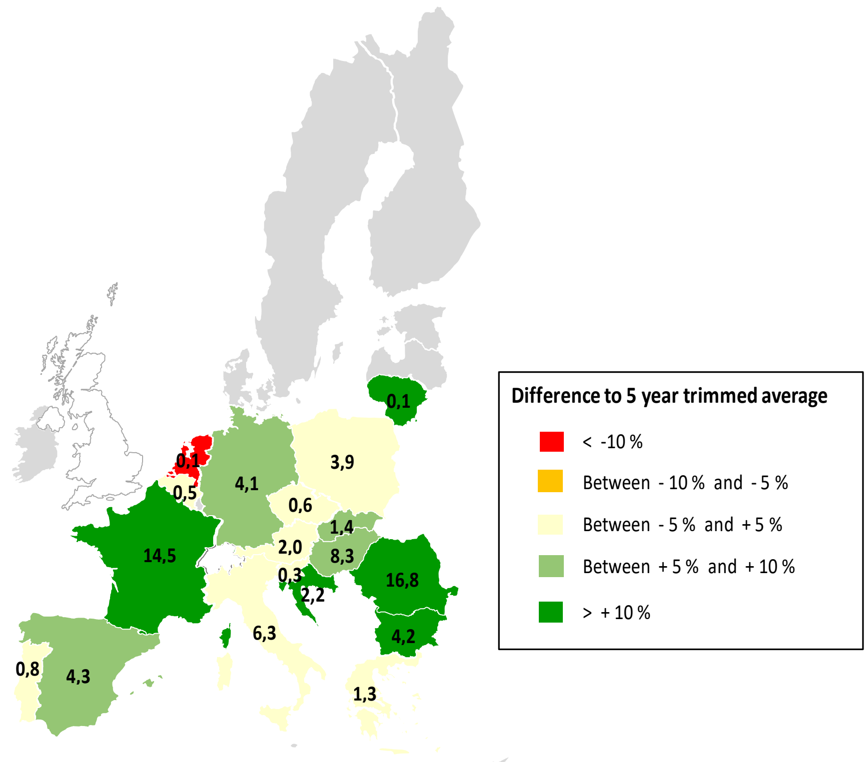
EU production: 56,1 million tonnes - difference to 5 year trimmed average: +6,5%

Maize area - 2020 projection (thousand hectares)



EU area: 8 906 thousand hectares - difference to 5 year trimmed average: +3,9%

Maize production - 2020 projection (million tonnes)



EU production: 71,9 million tonnes - difference to 5 year trimmed average: +9,8%

EU 2020/21 Usable Production

EU 27 Usable production, 2020/21

(million tonnes)

	EC DG AGRI 25-June	Stratégie Grain 11-June	ADM 29-May	COCERAL 03-June	COPA 15-June
Soft Wheat	*117,2*	*121,1*	*121,6*	*119,7*	*118,1*
Durum Wheat	*7,3*	*7,8*	*7,6*	*7,4*	*7,1*
Barley	*56,1*	*55,5*	*56,3*	*55,4*	*53,5*
Maize	*71,9*	*65,9*	*65,3*	*66,6*	*69,3*
Rye	*8,6*	*7,8*	*8,5*	*8,4*	*8,8*
Total Cereals	**284,3**	**281,2**	**280,6**	**279,8**	**283,5**

Production 2020/21 Forecast Year/Year Variation

(most important producers*)

France	-12,2%
Germany	-1,1%
Poland	4,7%
Italy	0,1%
Spain	7,9%
Hungary	-0,9%
Romania	-5,8%

**: 75% of the EU production*

Source: DG AGRI -G4

EU Cereals Balance Sheet

EU
CEREALS SUPPLY & DEMAND

EU
(thousand metric tonnes)

last updated: 25/06/2020	**2020/21 (projection)**									
	Common wheat	**Barley**	**Durum wheat**	**Maize**	**Rye**	**Sorghum**	**Oats**	**Triticale**	**Others**	**TOTAL CEREALS**
Beginning stocks	**7.546**	**6.586**	**2.339**	**24.490**	**910**	**1.732**	**340**	**2.512**	**138**	**46.594**
Usable production	117.184	56.121	7.267	71.925	8.611	912	7.438	10.730	4.104	284.292
Area (thousand ha)	*21.357*	*11.407*	*2.201*	*8.906*	*2.270*	*176*	*2.557*	*2.717*	*1.606*	*53.196*
Yield (tonnes/ha)	*5*	*5*	*3*	*8*	*4*	*5*	*3*	*4*	*3*	*5*
Imports (from third countries)	4.500	1.377	1.886	16.595	46	233	55	0	146	24.838
Total supply	**129.230**	**64.084**	**11.492**	**113.010**	**9.567**	**2.877**	**7.833**	**13.242**	**4.388**	**355.724**
Total domestic use	97.581	43.710	9.022	83.538	7.162	642	6.588	8.861	3.804	260.907
Human consumption	40.561	363	8.083	4.705	2.961	155	992	52	23	57.894
Seed	4.600	2.131	400	402	300	29	350	500	270	8.981
Industrial uses	9.717	6.780	95	11.100	1.300	0	101	445	170	29.708
of which bioethanol/biofuel	*(3 740)*	*(437)*	*(0)*	*(6 164)*	*(700)*	*(0)*	*(0)*	*(344)*	*(14)*	*(11 398)*
Animal feed	42.000	34.100	400	66.900	2.550	452	5.100	7.800	3.316	162.618
Losses	703	337	44	432	52	5	45	64	25	1.706
Exports (to third countries)	25.000	10.800	1.269	3.528	169	13	194	3	18	40.993
Total use	**122.581**	**54.510**	**10.291**	**87.066**	**7.331**	**655**	**6.781**	**8.864**	**3.821**	**301.900**
Ending stocks**	**6.649**	**9.574**	**1.201**	**25.943**	**2.236**	**2.222**	**1.052**	**4.378**	**567**	**53.823**
Change in stocks**	-897	2.988	-1.138	1.453	1.326	490	712	1.866	430	7.229

* Marketing year: from July to June

** At the end of the marketing year

European Commission

EU Cereals Balance Sheet 2020/21

- Production forecast above average (284,3 million tonnes, - 3,4% y/y)
  - Areas communicated by Member States
  - Yield Forecast
  - Statu quo total cereal area (53,2 million ha, 0,2% y/y): less winter
  - Crops compensated by spring and sumer crops
  - Significant decrease of soft wheat production
  - Quality issue might raise

- Decrease of total imports, in particular for maize imports

- Decrease of total exports, in particular for soft wheat

- Increase of total ending stocks but tight wheat outlook

- Oilseeds

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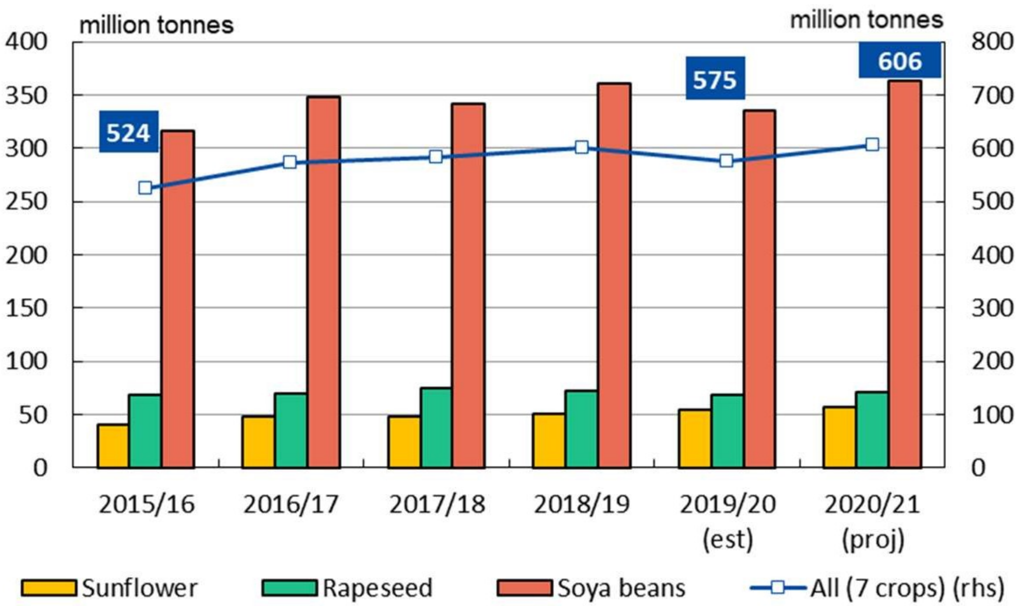
2020/21 World Oilseeds (USDA)

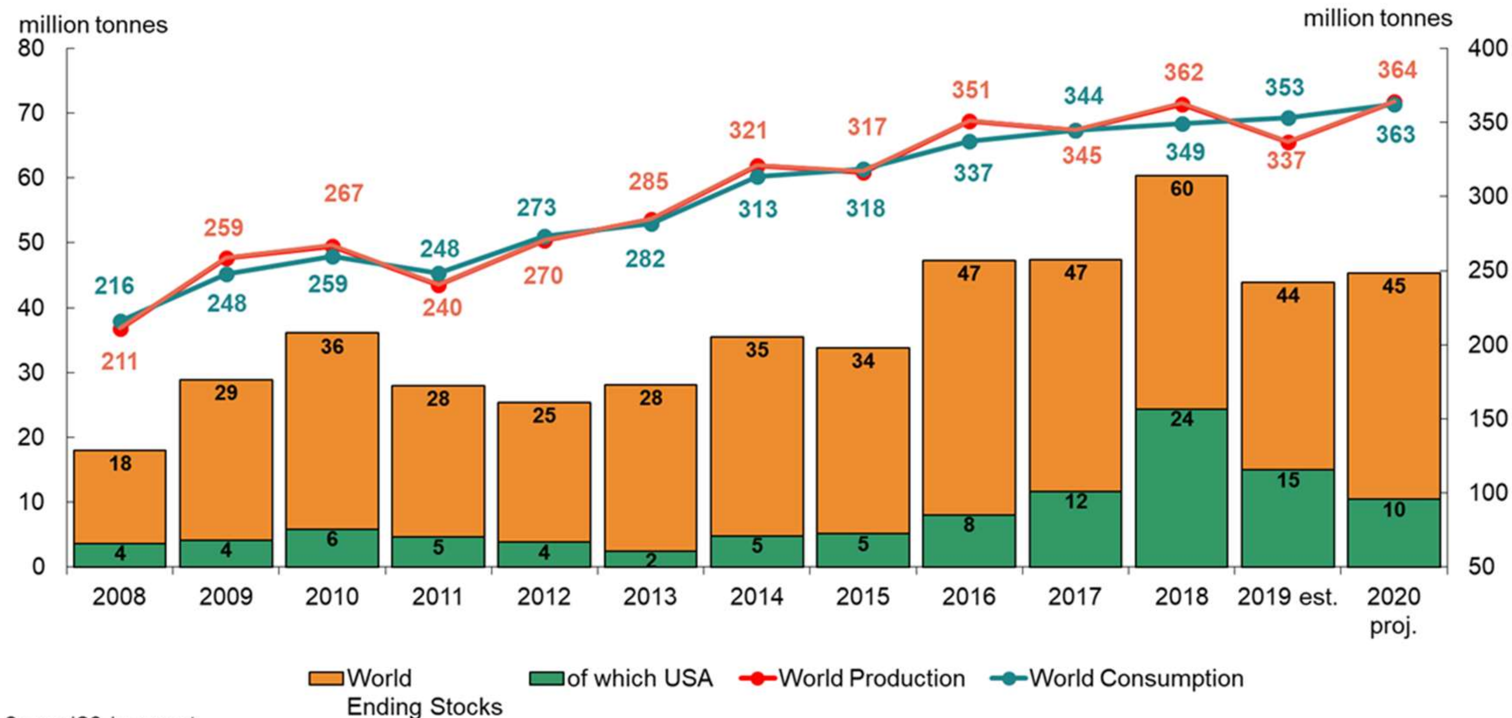


20/21 outlook (changes y/y):

Total Oilseeds: 606 m t

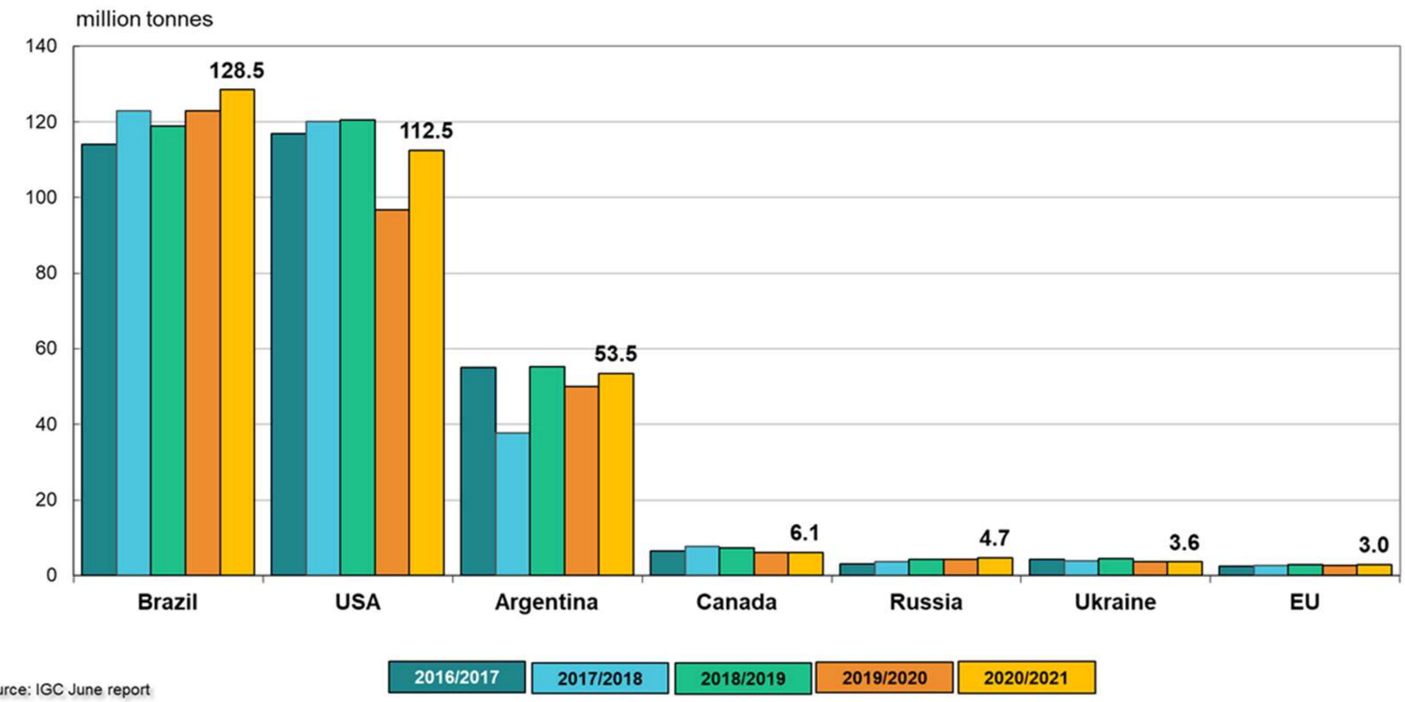
- Soya beans: 363 m t
- Rapeseed: 71 m t
- Sunflower: 57 m t

World soya: IGC



Source: IGC June report

Main soya producing countries



Source: IGC June report

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Rapeseed/canola (IGC)

m t	17/18	18/19 (est.)	19/20 (f'cast)	20/21 (proj.)	y/y change
Opening stocks	5.0	6.9	6.5	5.8	*- 10.9%*
Production	75.1	72.5	68.7	69.3	*+ 0.9%*
Total supply	**80.0**	**79.4**	**75.2**	**75.1**	***- 0.1%***
Total use	**73.2**	**72.9**	**69.4**	**70.1**	***+ 0.9%***
of which: Crush	*70.2*	*69.1*	*65.7*	*66.8*	*+ 1.7%*
Feed	*2.2*	*2.9*	*2.6*	*2.3*	*- 12.9%*
Food	*0.7*	*0.9*	*1.0*	*0.9*	*- 10.0%*
Closing stocks	**6.9**	**6.5**	**5.8**	**5.0**	***- 13.2%***
Major exporters [a)]	*3.4*	*4.3*	*3.1*	*2.5*	*- 20.2%*
Trade (Oct/Sep)	**16.1**	**14.7**	**15.3**	**15.2**	***- 0.8%***

a) Australia, Canada, Ukraine

m t	17/18	18/19 (est.)	19/20 (f'cast)	20/21 (proj.)	y/y change
Major exporters					
Canada	21.3	20.3	18.6	18.5	*- 0.9%*
Australia	3.9	2.4	2.3	3.2	*+ 39.5%*
Ukraine	2.2	2.9	3.4	3.0	*- 10.8%*
Selected others					
EU [a)]	22.0	20.0	17.0	15.6	*+ 2.6%* [a)]
China	13.3	13.3	13.6	13.8	*+ 1.7%*
India	7.1	7.6	7.8	7.9	*+ 1.3%*
Russia	1.5	2.0	2.0	2.1	*+ 0.5%*
UK	2.2	2.0	1.8	1.1	*- 35.8%*
World total	**75.1**	**72.5**	**68.7**	**69.3**	*+ 0.9%*

a) EU-28 to 19/20, EU-27 from 20/21. Change on EU-27 basis

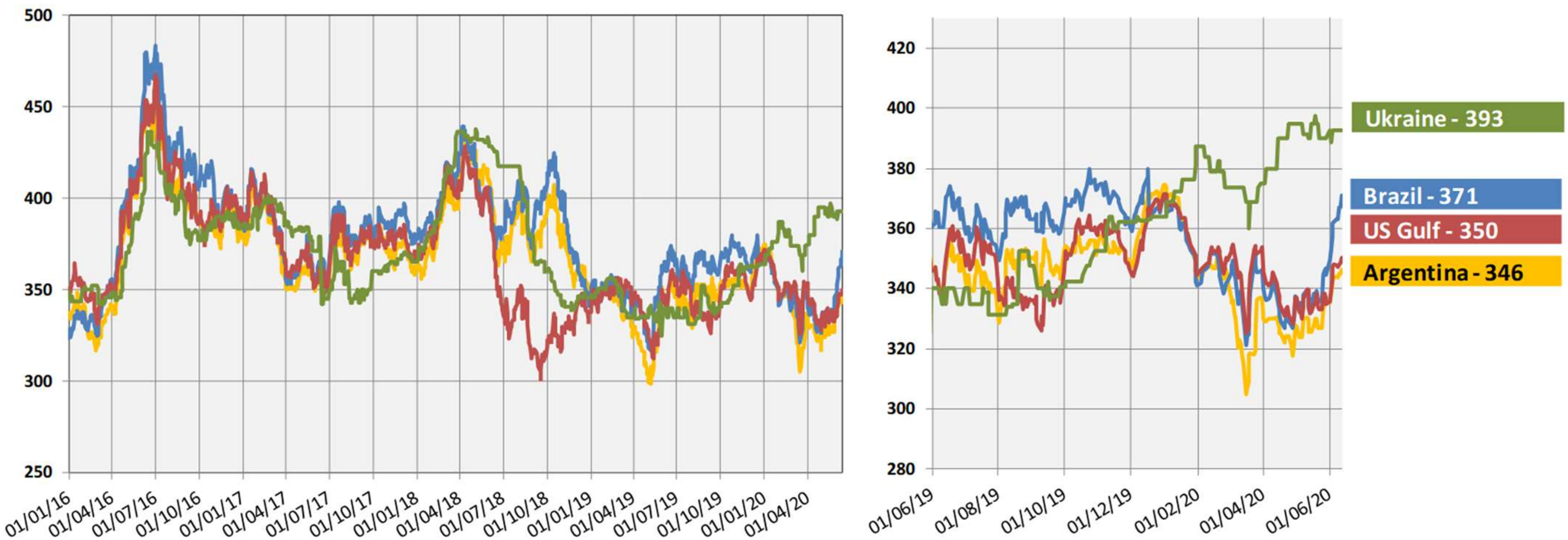
Source: IGC June report

European Commission

World oilseeds 2020/21: key messages

- Stable global **oilseeds** outlook at a record output of 606 million tonnes.
- Global **soya bean** production is at all time high of 363 million tonnes (+7,3% y/y). Demand from China is increasing. Record exports in May from Brazil
- Global **rapeseed** stable on higher production in Canada and Australia.
- Global **sunflower** production is at a record 57 million tonnes, with Ukraine and Russia the main producers, followed by the EU.

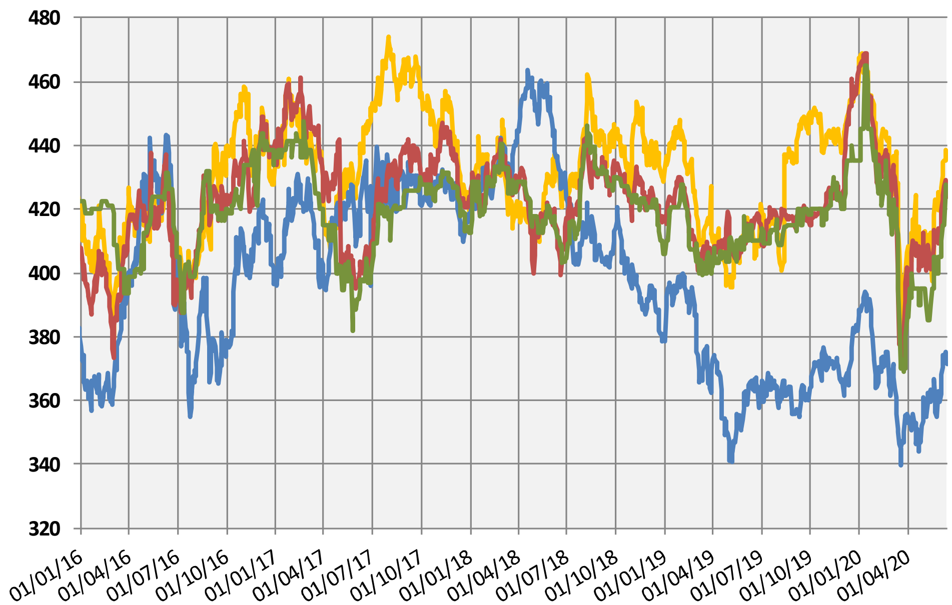
World export prices soya beans (USD/tonne)

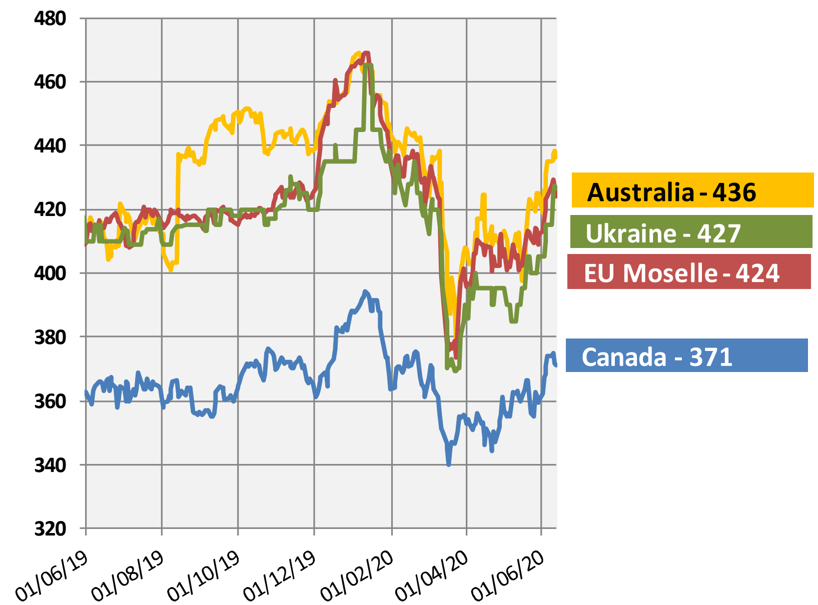


Source: International Grains Council

European Commission

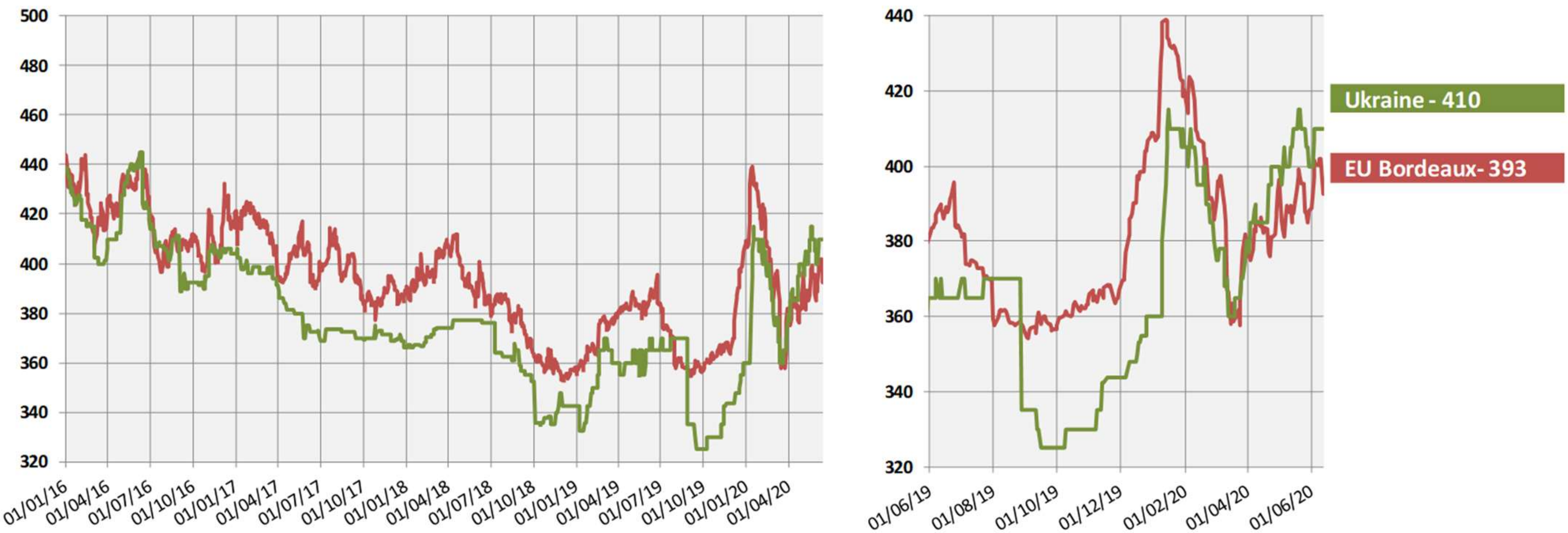
World export prices for rapeseed – (USD/tonne)





Source: International Grains Council

World export prices for sunflower – (USD/tonne)



Source: International Grains Council

World Oilseeds prices: key messages

- Soya bean prices remain at a low level, but with a strong increase in Brazilian prices due to high demand.
- Rapeseed prices are increasing on low stock levels in the EU and Ukraine. Canada remains the cheapest origin.
- Sunflower seeds prices are very volatile between USD 380 and USD 420 per tonne, due to low stock levels.

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EU oilseeds 2020/21 forecast

EU OILSEEDS AREA *(million hectares)*

	5-year trimmed	2019/20	2020/21 June	2020/21 vs. 2019/20 (%)	2020/21 vs. 5-y AVG (%)
Rapeseed	*6.06*	*5.18*	*5.22*	*0.7*	*-13.8*
Sunflower	*4.20*	*4.35*	*4.40*	*1.3*	*4.8*
Soya Beans	*0.89*	*0.90*	*0.93*	*4.2*	*5.0*
TOTAL	**11.15**	**10.43**	**10.56**	**1.3**	**-5.3**

EU OILSEEDS PRODUCTION *(million tonnes)*

	5-year trimmed average	2019/20	2020/21 June	2020/21 vs. 2019/20 (%)	2020/21 vs. 5-y AVG (%)
Rapeseed	*19.15*	*15.36*	*15.41*	*0.3*	*-19.5*
Sunflower	*9.33*	*10.07*	*10.45*	*3.7*	*12.0*
Soya Beans	*2.50*	*2.69*	*2.78*	*3.0*	*11.2*
TOTAL	**30.65**	**28.13**	**28.64**	**1.8**	**-7.6**

Sources : EC - DG AGRI.

European Commission

EU rapeseed

EU rapeseed production *(million tonnes)*

	5-year trimmed average	2019/20	2020/21 projection			
			May	June	year on year (%)	5yrs trimmed (%)
France	*5.22*	*3.44*	*3.26*	*3.47*	*1.0*	*-33.5*
Germany	*4.62*	*2.83*	*3.24*	*3.13*	*10.6*	*-32.3*
Poland	*2.54*	*2.29*	*2.68*	*2.47*	*7.4*	*-2.9*
Hungary	*0.92*	*0.90*	*0.89*	*0.86*	*-4.0*	*-6.3*
Czechia	*1.34*	*1.16*	*1.11*	*1.17*	*1.5*	*-12.5*
Romania	*1.32*	*0.85*	*0.74*	*0.64*	*-25.0*	*-51.5*
Other EU MS	*3.18*	*3.76*	*3.70*	*3.67*	*-2.3*	*15.3*
TOTAL EU	**19.15**	**15.23**	**15.62**	**15.41**	**1.2**	**-19.5**

Source: EC-DG AGRI.

EU Oilseeds 2020/21: key messages

- Based on Member States notifications total oilseed **area** for 2020/21 is revised downwards to 10.6 million hectares on reduced area for rapeseed and soya beans. Both by around 70,000 hectares.
- Oilseed **production** for 2020/21 is 0.2 million tonnes lower compared with last month forecast at 28.7 million tonnes. The sunflower production forecast has been increased by 0.2 million tonnes, while both rapeseed and soya beans have been reduced by 0.2 million tonnes.
- However, this forecast is still very tentative given it is still early in the season.

EU protein crops 2020/21 forecast

EU PROTEIN CROPS AREA *(million hectares)*

	5-year trimmed	2019/20	2020/21 June	2020/21 vs. 2019/20 (%)	2020/21 vs. 5-y AVG (%)
Field peas	*0.80*	*0.79*	*0.81*	*2.9*	*1.5*
Broad beans	*0.47*	*0.42*	*0.44*	*5.4*	*-4.8*
Sweet lupins	*0.17*	*0.17*	*0.17*	*1.3*	*3.2*
TOTAL	**1.46**	**1.38**	**1.42**	**3.5**	**-2.5**

EU PROTEIN CROPS PRODUCTION *(million tonnes)*

	5-year trimmed average	2019/20	2020/21 June	2020/21 vs. 2019/20 (%)	2020/21 vs. 5-y AVG (%)
Field peas	*1.97*	*2.04*	*2.22*	*8.8*	*12.3*
Broad beans	*1.16*	*1.05*	*1.21*	*15.4*	*3.9*
Sweet lupins	*0.26*	*0.21*	*0.23*	*9.7*	*-10.5*
TOTAL	**3.43**	**3.29**	**3.65**	**11.0**	**6.7**

Sources : EC - DG AGRI.

European Commission

EU Protein crops 2020/21: key messages

- This month, the area for field peas and broad beans is revised slightly downwards on Member States notifications. The area is now slightly below the 5-year average and 3% above last years figures.
- The production is now estimated to be 11% above last year and 6% above the 5-years average, both the field peas and broad beans show still a strong increase.

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European Commission

Oilseeds balance sheet (EU)

OILSEEDS SUPPLY & DEMAND *(thousand metric tonnes)*

last updated: 25/06/2020	2019/20 fc				2020/21 proj.			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	1,372	1,990	891	4,254	907	1,019	825	2,750
Usable production	15,364	2,695	10,072	28,130	15,411	2,776	10,448	28,635
Area (thousand ha)	5,185	896	4,346	10,427	5,223	934	4,402	10,560
Yield (tonnes/ha)	2.96	3.01	2.32	2.70	2.95	2.97	2.37	2.71
Imports (from third countries)	6,000	14,700	1,100	21,800	5,500	14,907	930	21,337
Total supply	22,736	19,385	12,063	54,184	21,818	18,702	12,203	52,723
Domestic use	21,529	18,102	10,668	50,299	20,687	17,564	10,832	49,083
of which crushing	*(20,819)*	*(15,907)*	*(9,433)*	*(46,158)*	*(19,969)*	*(15,502)*	*(9,584)*	*(45,055)*
Exports (to third countries)	300	264	570	1,134	330	239	546	1,115
Total use	21,829	18,366	11,238	51,434	21,018	17,802	11,378	50,198
Ending stocks	907	1,019	825	2,750	800	900	825	2,525
Change in stocks	-466	-971	-66	-1,503	-107	-119	-	-226

Oil meals balance sheet (EU)

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

last updated: 25/06/2020	2019/20 fc				2020/21 proj.			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	**50**	**343**	**100**	**493**	**50**	**340**	**100**	**490**
Usable production	11,867	12,566	5,188	29,621	11,382	12,247	5,271	28,900
Imports (from third countries)	400	17,000	3,000	20,400	416	17,044	3,215	20,675
Total supply	**12,317**	**29,909**	**8,288**	**50,514**	**11,848**	**29,631**	**8,586**	**50,065**
Domestic use	11,767	29,069	7,588	48,423	11,248	28,588	7,979	47,815
Exports (to third countries)	500	500	600	1,600	551	701	507	1,758
Total use	**12,267**	**29,569**	**8,188**	**50,023**	**11,798**	**29,288**	**8,486**	**49,573**
Ending stocks	**50**	**340**	**100**	**490**	**50**	**342**	**100**	**492**
Change in stocks	-	-2	-	-2	-	2	-	2

Vegetable oils balance sheet (EU)

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

last updated: 25/06/2020	2019/20 fc					2020/21 proj.				
	Rapeseed	Soya beans	Sunflower	Palm	TOTAL	Rapeseed	Soya beans	Sunflower	Palm	TOTAL
Beginning stocks	589	175	268	489	1,520	594	175	273	485	1,527
Usable production	8,536	3,181	3,962	0	15,679	8,187	3,100	4,025	0	15,313
Imports (from third countries)	500	500	2,300	6,100	9,400	462	347	1,643	6,500	8,952
Total supply	9,624	3,856	6,529	6,589	26,599	9,243	3,622	5,942	6,985	25,792
Domestic use	8,731	2,781	5,556	5,904	22,972	8,313	2,423	4,971	6,275	21,983
Exports (to third countries)	300	900	700	200	2,100	339	1,024	700	222	2,285
Total use	9,031	3,681	6,256	6,104	25,072	8,652	3,447	5,672	6,497	24,267
Ending stocks	594	175	273	485	1,527	591	175	270	489	1,525
Change in stocks	5	-	6	-4	7	-2	-	-3	3	-2

European Commission

Protein crops balance sheet (EU)

PROTEIN CROPS SUPPLY & DEMAND *(thousand metric tonnes)*

last updated 18/06/2020	2020/21 projections								
	Peas	Broad beans	Sweet lupins	Chick peas	Lentils	Other dry pulses	TOTAL	TOTAL 18/19	Change 18/19
Beginning stocks	-	-	-	-	-	-	-	-	-
Usable production	2,216	1,208	230	192	125	537	4,508	4,038	11.6%
Imports	331	72	141	129	192	450	1,316	1,478	-11.0%
Total supply	**2,547**	**1,280**	**371**	**321**	**318**	**987**	**5,824**	**5,516**	**5.6%**
Domestic use	2,345	998	371	300	312	960	5,285	4,984	6.0%
- Food	*(862)*	*(153)*	*(3)*	*(300)*	*(312)*	*(517)*	*(2,147)*	*(2,044)*	*5.1%*
- Feed	*(1,483)*	*(845)*	*(367)*	*(0)*	*(0)*	*(443)*	*(3,138)*	*(2,941)*	*6.7%*
Exports	202	282	0	21	6	27	539	531	1.5%
Total Use	**2,547**	**1,280**	**371**	**321**	**318**	**987**	**5,824**	**5,516**	**5.6%**
Ending stocks	-	-	-	-	-	-	-	-	-

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

European Commission