



Oilseeds and Protein Crops market situation

Civil Dialogue Group

Dried Fodder, Energy and Non-Food Crops

14 September 2022

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World Oilseeds

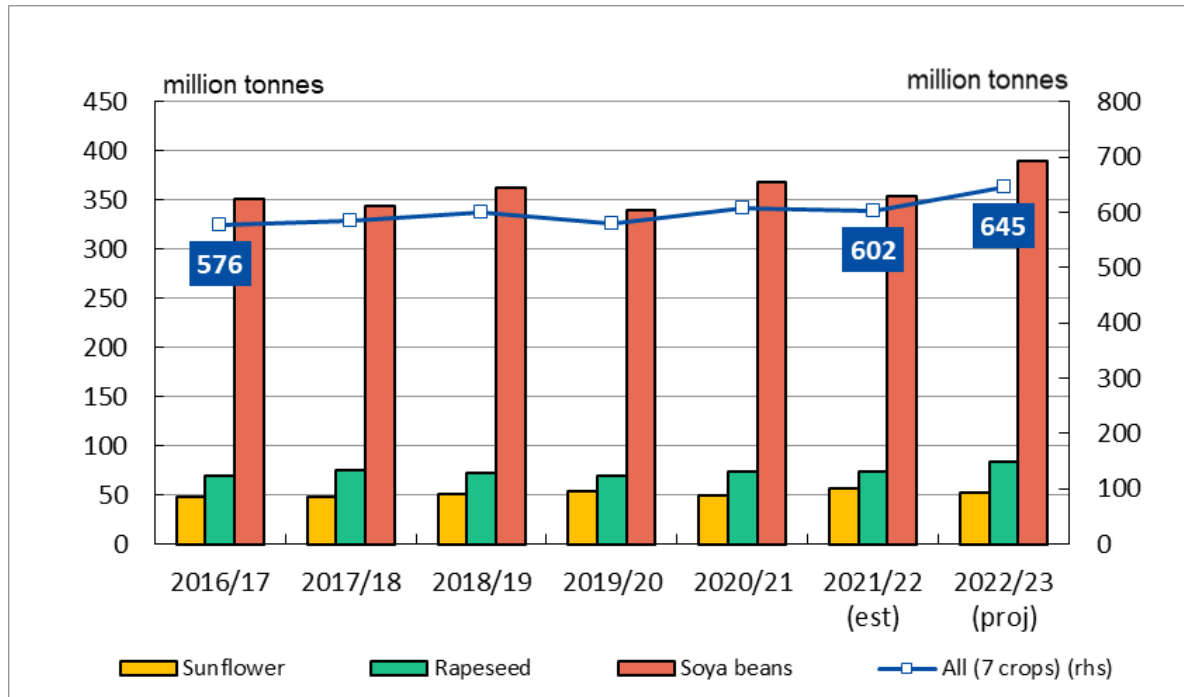


Oilseeds & Protein crops: areas & production (2022/23)



S&D balance sheets (Oilseeds, Meals, Oils)

2022/23 World Oilseeds (USDA)

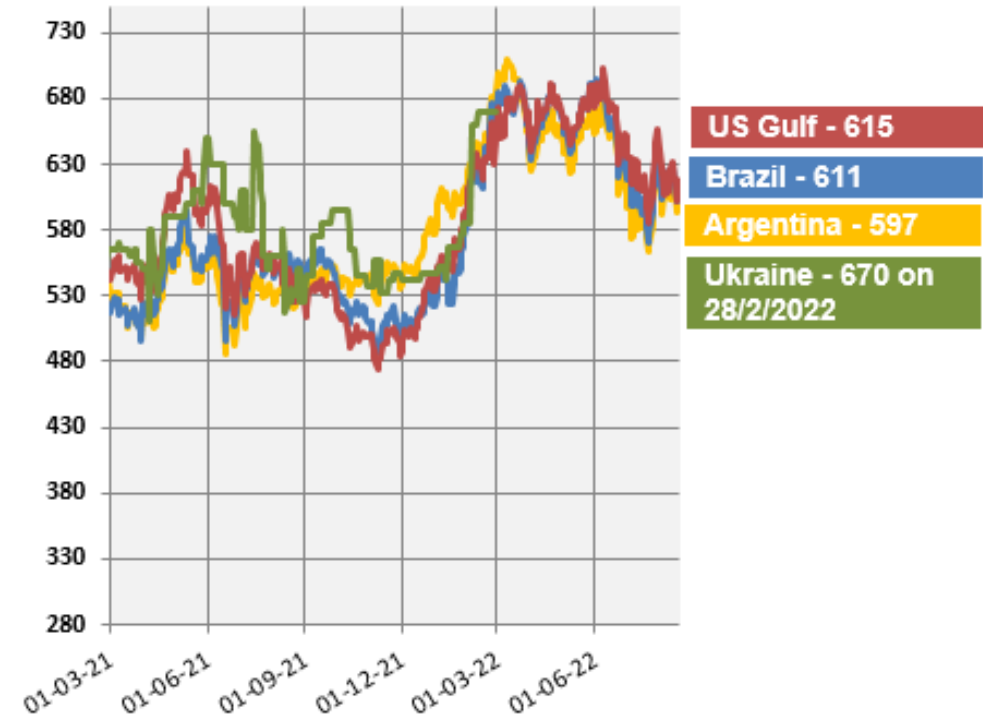
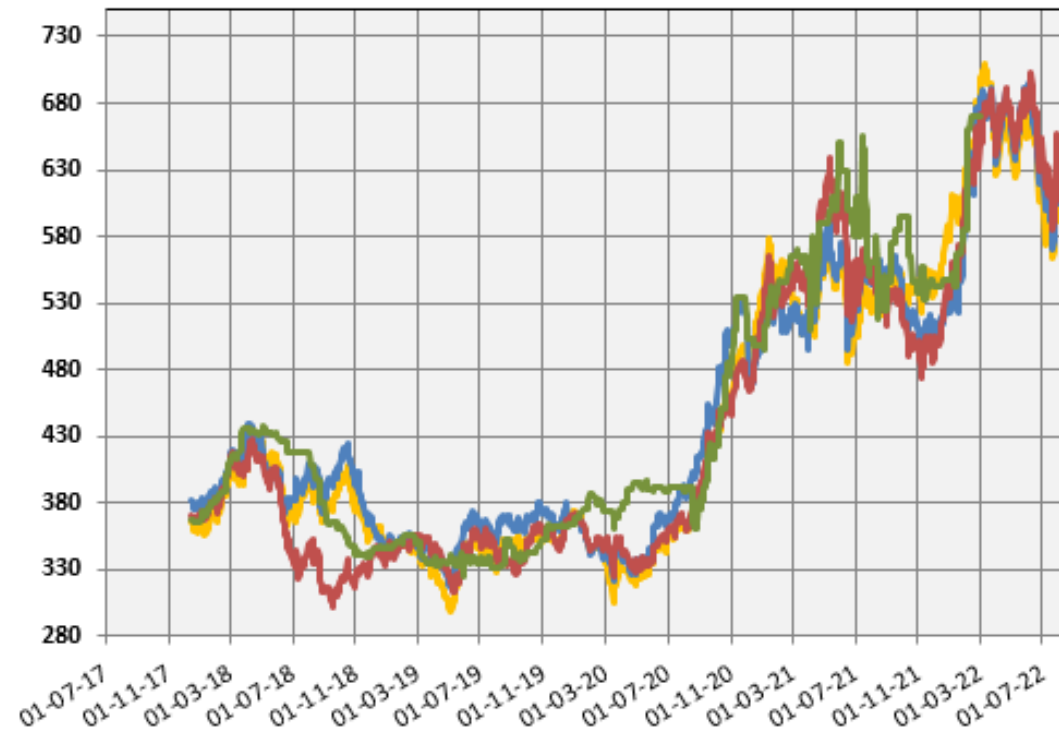


22/23 outlook (changes y/y):

Total Oilseeds:	645 mt (+43)	↑
• Soya beans:	390 mt	↑
• Rapeseed:	83 mt	↑
• Sunflower:	52 mt	↓

World export prices for soya beans – (USD/tonne)

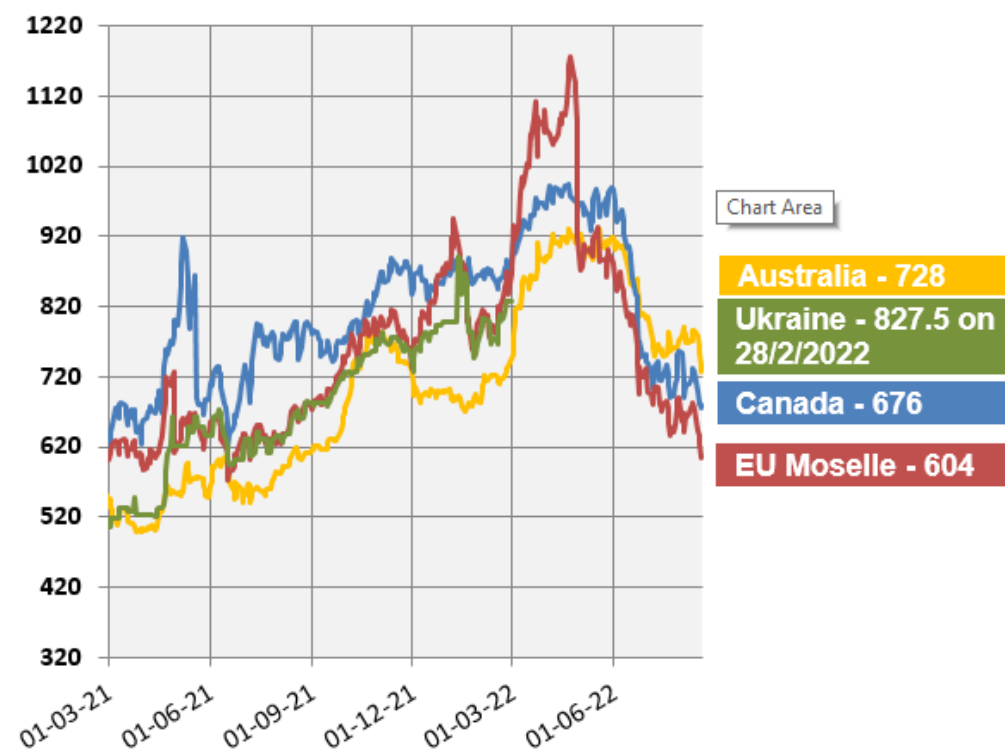
World export prices for soya beans - (USD/tonne)



Source: International Grains Council
Latest prices referring to: 19-08-2022

World export prices for rapeseed – (USD/tonne)

World export prices for rapeseed - (USD/tonne)



Source: International Grains Council
Latest prices referring to: 19-08-2022

World export prices for sunflower – (USD/tonne)

World export prices for sunflower - (USD/tonne)



Source: International Grains Council
Latest prices referring to: 19-08-2022

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World Oilseeds



Oilseeds & Protein crops: areas & production (2022/23)



S&D balance sheets (Oilseeds, Meals, Oils)

EU oilseeds 2022/23 projections

EU OILSEEDS AREA

(million hectares)

	5-year trimmed average	2021/22	August	2022/23 vs. 2021/22 (%)	vs. 5-y AVG (%)
Rapeseed	5.61	5.33	5.74	7.9	2.4
Sunflower	4.33	4.35	4.79	10.3	10.6
Soya Beans	0.95	0.94	1.05	11.2	10.5
TOTAL	10.89	10.61	11.58	9.1	6.3

EU OILSEEDS PRODUCTION

(million tonnes)

	5-year trimmed average	2021/22	August	2022/23 vs. 2021/22 (%)	vs. 5-y AVG (%)
Rapeseed	17.23	17.00	18.83	10.8	9.3
Sunflower	10.18	10.34	9.89	-4.3	-2.9
Soya Beans	2.69	2.66	2.59	-2.3	-3.6
TOTAL	30.11	29.99	31.32	4.4	4.0

Sources : EC - DG AGRI.

EU protein crops 2022/23 projections

EU PROTEIN CROPS AREA

(million hectares)

	5-year trimmed average	2021/22	August	2022/23 vs. 2021/22 (%)	vs. 5-y AVG (%)
Field peas	0.81	0.77	0.80	3.7	-1.3
Broad beans	0.46	0.48	0.48	1.7	4.2
Sweet lupins	0.18	0.21	0.21	0.5	13.7
TOTAL	1.46	1.45	1.49	2.6	2.3

EU PROTEIN CROPS PRODUCTION

(million tonnes)

	5-year trimmed average	2021/22	August	2022/23 vs. 2021/22 (%)	vs. 5-y AVG (%)
Field peas	1.97	1.83	2.06	12.60	4.60
Broad beans	1.14	1.12	1.26	12.60	11.00
Sweet lupins	0.27	0.32	0.26	-18.30	-1.20
TOTAL	3.37	3.27	3.58	9.5	6.3

Sources : EC - DG AGRI.

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World Oilseeds



Oilseeds & Protein crops: areas & production (2022/23)



S&D balance sheets (Oilseeds, Meals, Oils)

Oilseeds balance sheet (EU)

OILSEEDS SUPPLY & DEMAND

(thousand metric tonnes)

	2021/22 fc.				2022/23 proj.			
<i>Last updated: 25/8/2022</i>	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	500	1 100	700	2 300	500	1 200	867	2 567
Usable production	16 996	2 655	10 335	29 986	18 834	2 594	9 891	31 318
Area (thousand ha)	5 325	940	4 345	10 611	5 744	1 046	4 791	11 580
Yield (tonnes/ha)	3.19	2.82	2.38	2.83	3.28	2.48	2.06	2.70
Imports (from third countries)	5 563	13 773	1 148	20 484	4 500	14 500	800	19 800
Total supply	23 058	17 528	12 183	52 769	23 834	18 294	11 558	53 685
Domestic use	22 134	16 055	10 927	49 116	23 019	16 851	10 386	50 257
<i>of which crushing</i>	<i>(21 363)</i>	<i>(14 159)</i>	<i>(9 668)</i>	<i>(45 191)</i>	<i>(22 212)</i>	<i>(14 849)</i>	<i>(9 202)</i>	<i>(46 263)</i>
Exports (to third countries)	424	274	389	1 087	314	242	305	862
Total use	22 558	16 328	11 316	50 203	23 334	17 094	10 691	51 118
Ending stocks	500	1 200	867	2 567	500	1 200	867	2 567
Change in stocks	-	100	167	267	-	-	-	-

Sources : EC – DG AGRI

Oilmeals balance sheet (EU)

OILSEED MEALS SUPPLY & DEMAND

(thousand metric tonnes)

	2021/22 fc.				2022/23 proj.			
<i>Last updated: 25/8/2022</i>	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	50	342	100	492	50	342	100	492
Usable production	12 177	11 186	5 318	28 680	12 661	11 731	5 061	29 453
Imports (from third countries)	565	16 765	2 387	19 718	500	16 000	2 000	18 500
Total supply	12 792	28 294	7 805	48 890	13 211	28 073	7 161	48 444
Domestic use	12 036	27 211	6 799	46 046	12 542	26 983	6 469	45 994
Exports (to third countries)	706	741	906	2 352	618	748	592	1 958
Total use	12 742	27 952	7 705	48 398	13 161	27 731	7 061	47 952
Ending stocks	50	342	100	492	50	342	100	492
Change in stocks	-	-1	-	-1	-	1	-	1

Sources : EC – DG AGRI

Vegetable oils balance sheet (EU)

VEGETABLE OILS SUPPLY & DEMAND

(thousand metric tonnes)

	2021/22 fc.					2022/23 proj.				
<i>Last updated: 25/8/2022</i>	Rapeseed	Soya beans	Sunflower	Palm	TOTAL	Rapeseed	Soya beans	Sunflower	Palm	TOTAL
Beginning stocks	591	175	270	489	1 525	591	175	270	488	1 524
Usable production	8 759	2 832	4 061	0	15 651	9 107	2 970	3 865	0	15 941
Imports (from third countries)	592	518	2 044	5 439	8 594	425	250	2 000	4 623	7 298
Total supply	9 943	3 525	6 375	5 928	25 771	10 123	3 395	6 135	5 111	24 764
Domestic use	9 033	2 362	5 349	5 280	22 023	9 194	2 420	5 165	4 420	21 200
Exports (to third countries)	318	989	755	161	2 223	337	800	700	202	2 040
Total use	9 351	3 350	6 104	5 440	24 246	9 532	3 220	5 865	4 623	23 239
Ending stocks	591	175	270	488	1 524	591	175	270	488	1 525
Change in stocks	0	-	0	-1	-1	0	-	0	1	1

Sources : EC – DG AGRI

Thank you & Keep in touch



Market data at the EU Crops Market Observatory website:
<https://ec.europa.eu/agriculture/market-observatory/crops>