Cereals, Oilseeds and Proteins

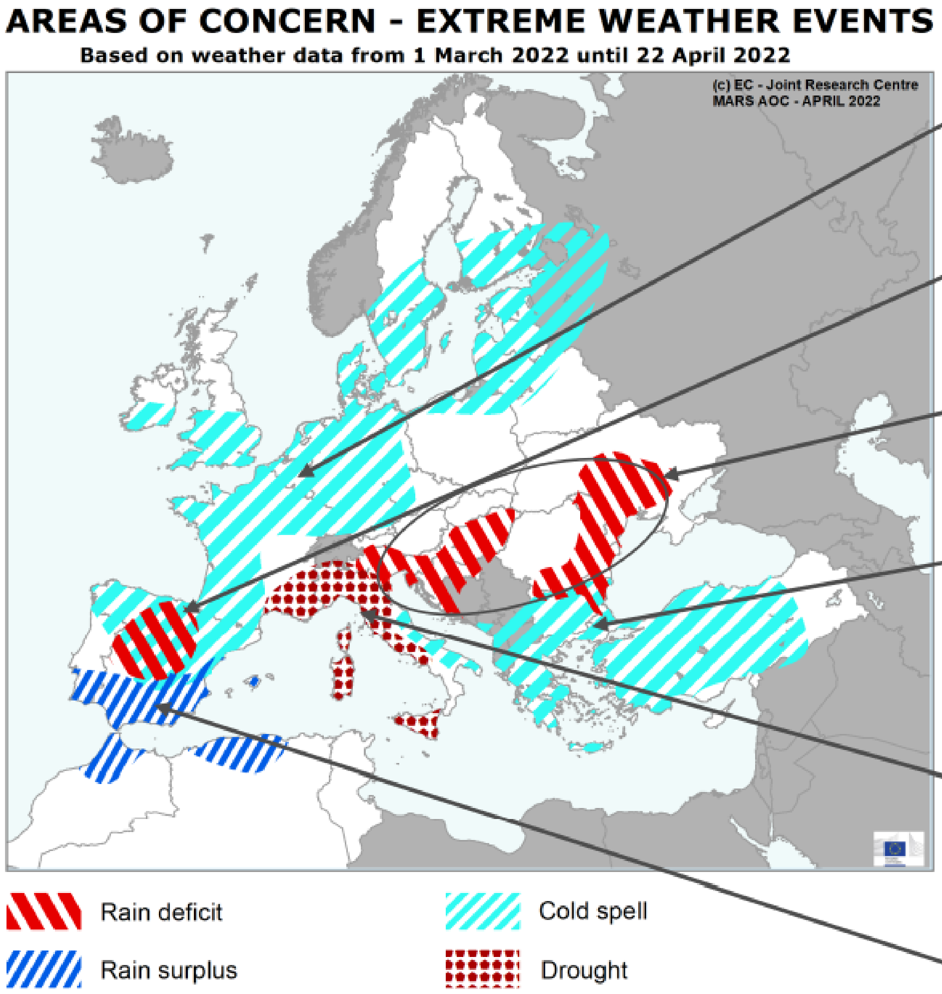
Market Situation

CROPS Market Observatory

3 May 2022

Agrometeorological conditions

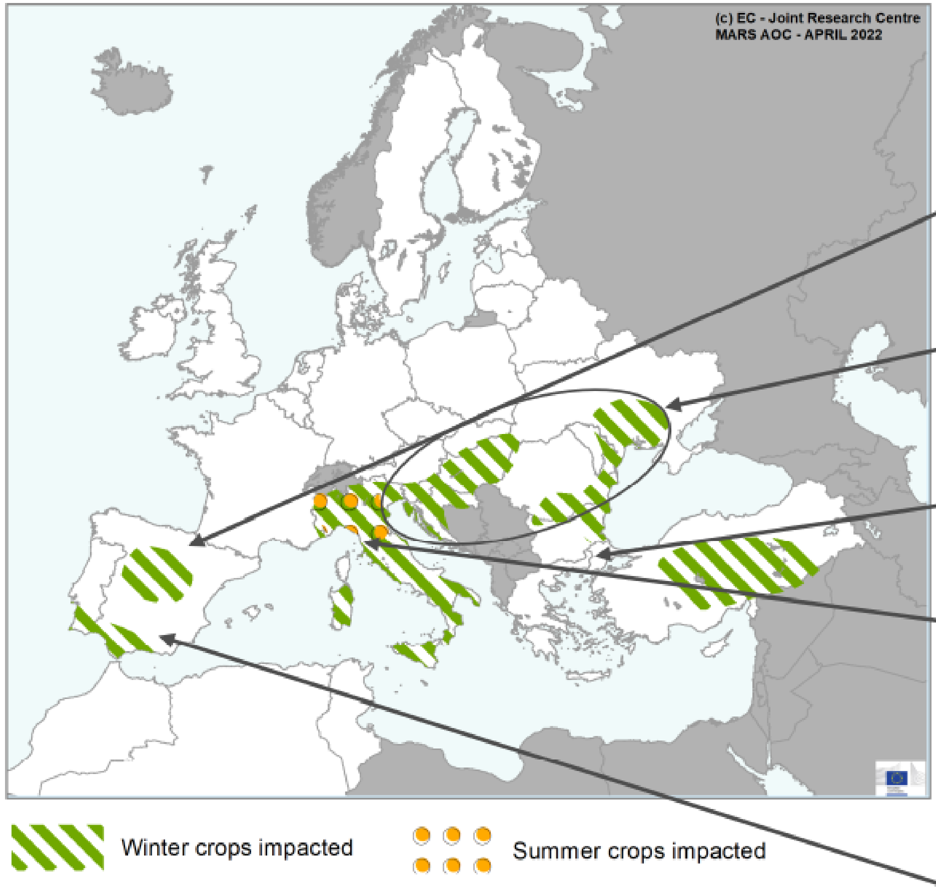
Extreme weather events & Areas of Concern (I)



- **Cold spell** (April). Little impact on arable crops (rapeseed, sugar beet).
- Some rains, but too little to solve the **rain deficit** for winter crops.
- Persistent **rain deficit** started impacting yield potentials.
- **Cold spell** (March). Cold conditions delayed crop development.
- **Drought continued in IT and southern FR**, impacting winter crops in IT and raising serious concerns over water availability for irrigation (summer crops).
- **Abundant rains** improved prospects for summer crops, but too late to fully restore yield potentials of winter crops.

Extreme weather events & Areas of Concern (II)

AREAS OF CONCERN - SUMMER/WINTER CROPS



- Some rains, but too little to solve the **rain deficit for winter crops**.
- Persistent rain deficit started **impacting yield potentials**.
- Cold spell (March). Cold conditions **delayed crop development**.
- Drought continued in IT and southern FR, **impacting winter crops in IT** and raising serious concerns over **water availability for irrigation (summer crops)**.
- Abundant rains improved prospects for summer crops, but too **late to fully restore yield potentials of winter crops**.

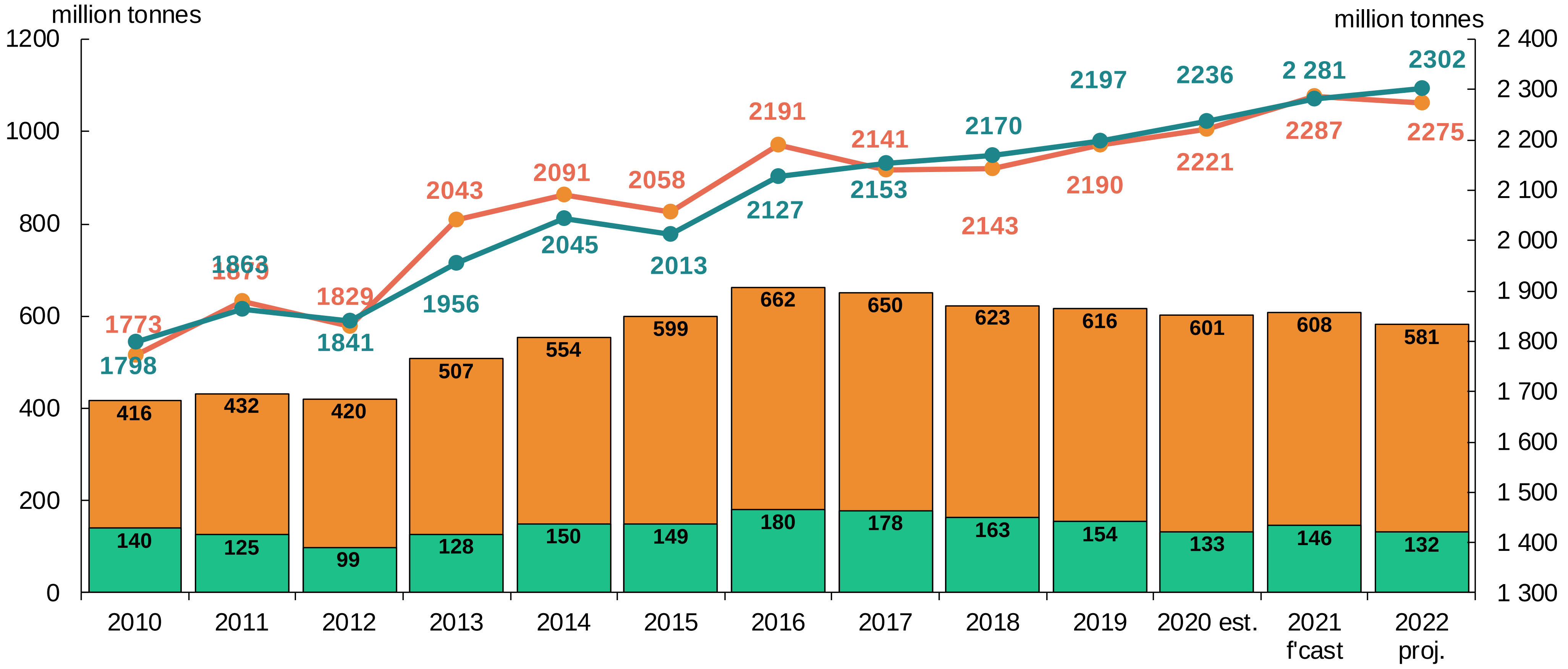
Cereals

- World Cereals market

World Cereals Forecasts

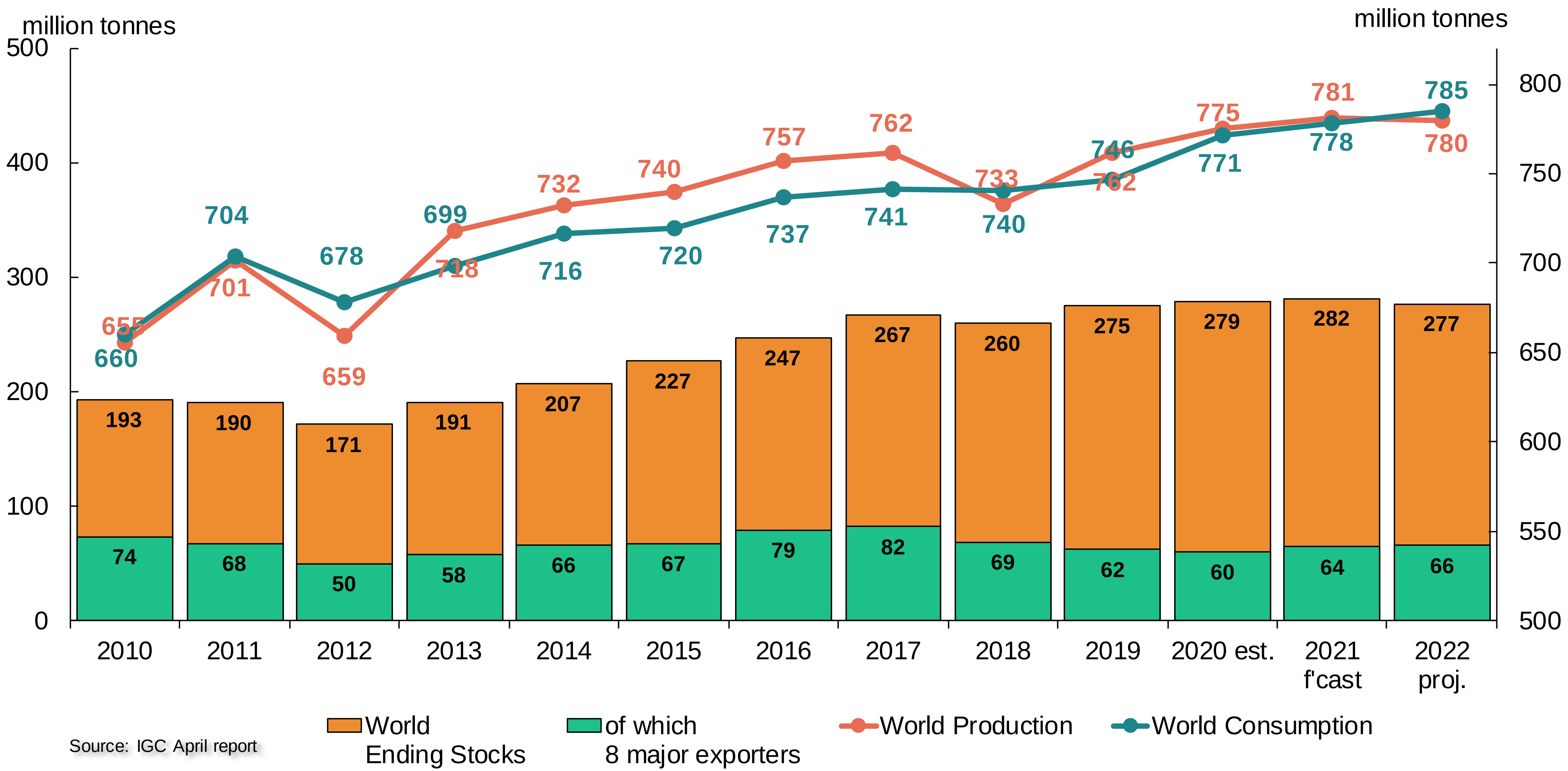
International Grains Council

World cereals: IGC



Source: IGC April report

World wheat: IGC



Source: IGC April report

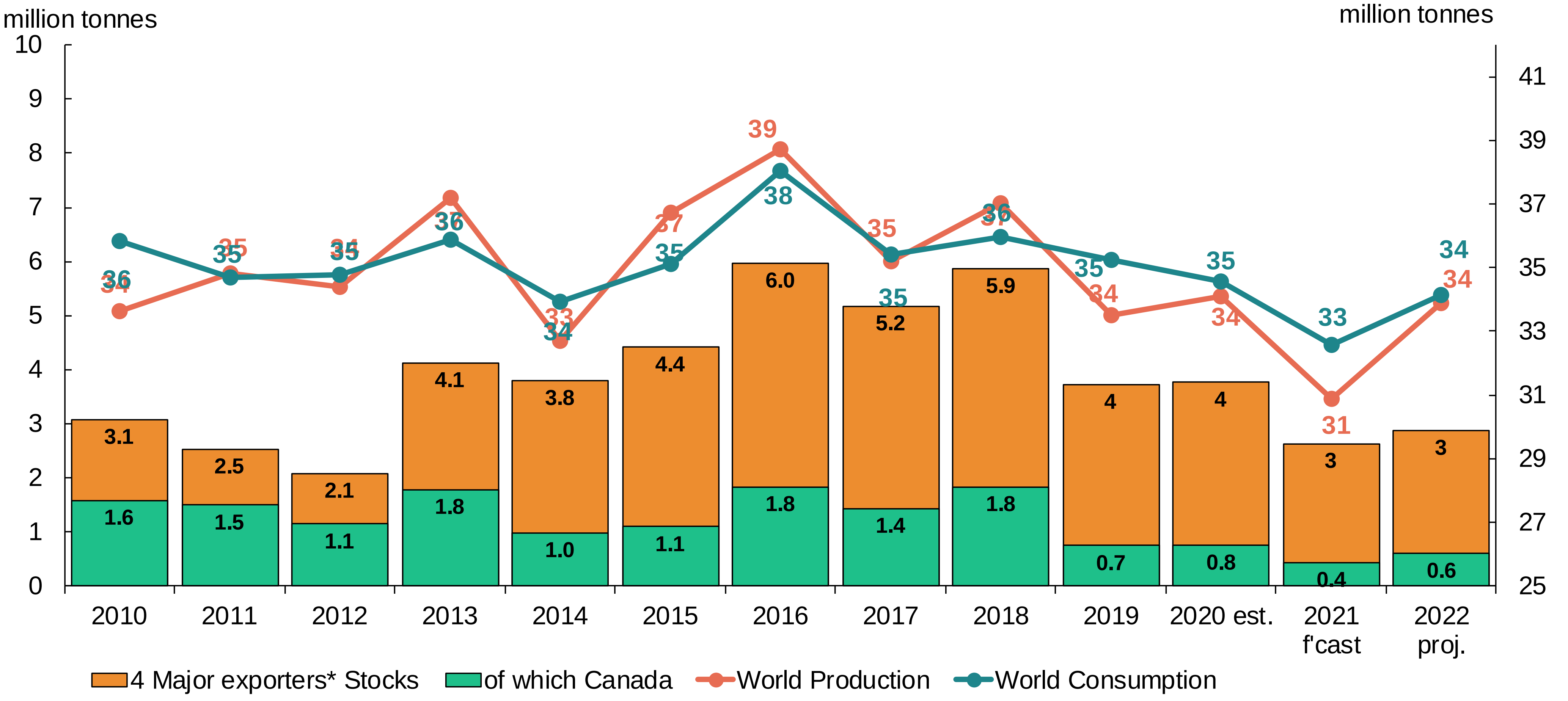
European Commission

Summary of the IGC Grain Market Report
(GMR 531 of 21/04/2022)
Outlook for 2022/23

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

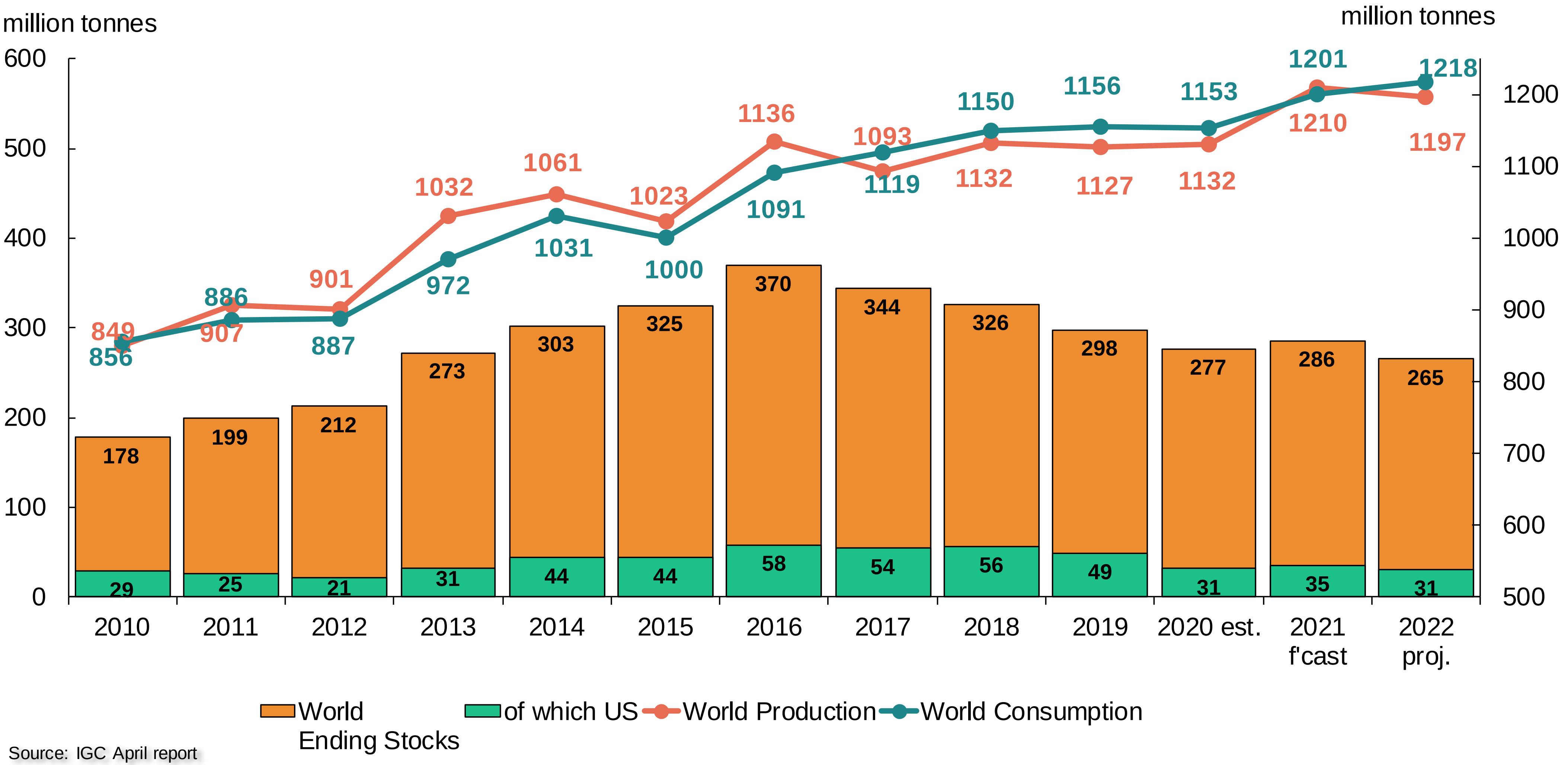
	2019/20	2020/21 *(estimate)*	2021/22 *(forecast)*	2022/23 *(projection)*	*m/m change (m t)*	y/y change
EU-27 **(2020/21)** ***EU-27 + UK to 2019/20***	155.0	125.7	138.1	**135.5**	*n/a*	-1.9%
USA	52.6	49.8	44.8	**49.9**	*n/a*	+11.5%
Canada	32.7	35.2	21.7	**31.6**	*n/a*	+46.1%
Russia	73.6	85.4	75.0	**82.5**	*n/a*	+10.0%
Ukraine	29.2	25.4	33.0	**19.4**	*n/a*	-41.2%
Australia	14.5	33.3	36.3	**27.8**	*n/a*	-23.5%
China	133.6	134.3	137.1	**135.0**	*n/a*	-1.5%
India	103.6	107.9	109.6	**111.3**	*n/a*	+1.6%
World	**761.5**	**774.9**	780.9	**779.9**	***n/a***	**-0.1%**

World durum wheat: IGC



*4 major exporters: Canada, EU, Mexico and USA
Source: IGC April report

World maize: IGC



Source: IGC April report

Summary of the IGC Grain Market Report

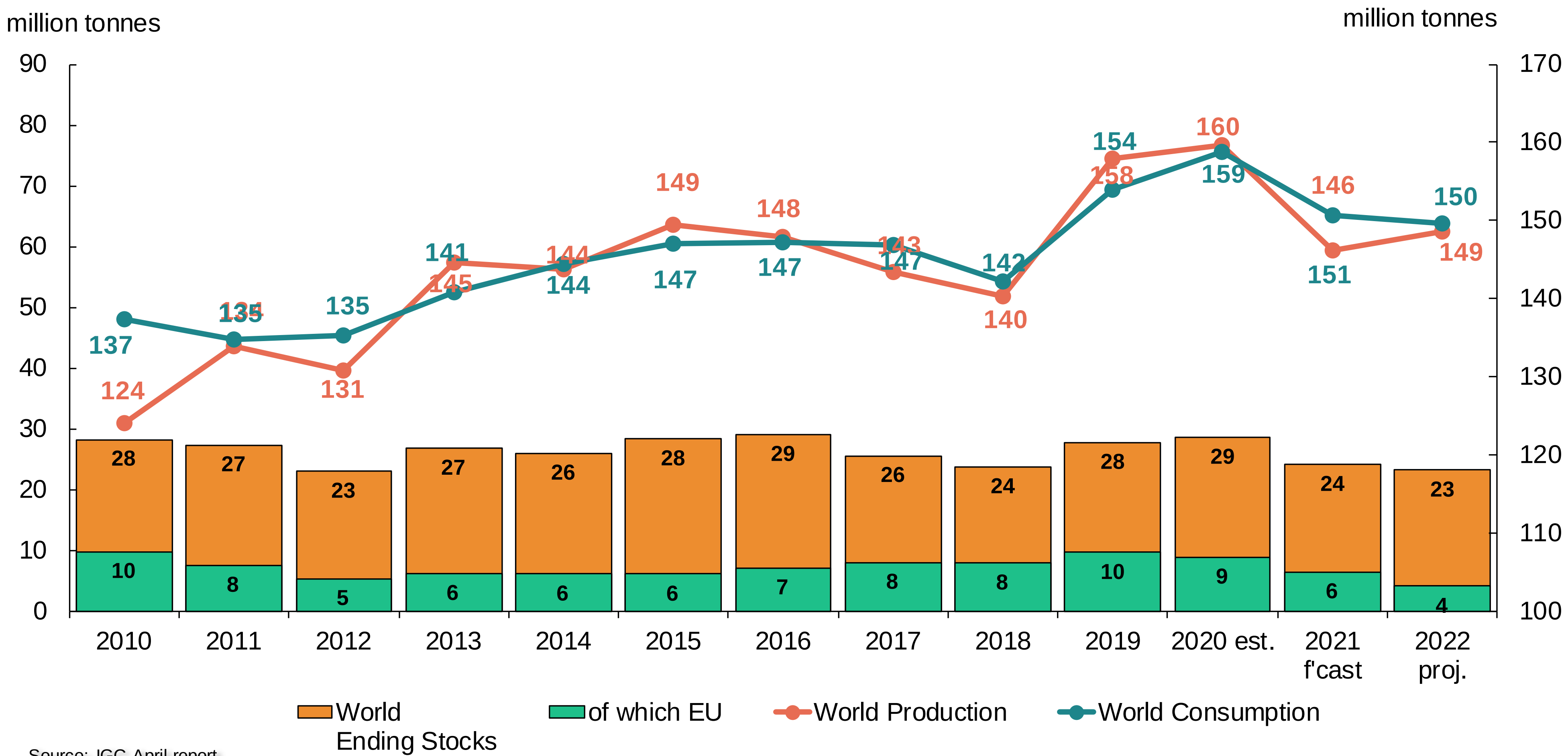
(GMR 531 of 21/04/2022)

Outlook for 2022/23

Maize production in selected countries (million tonnes)

	2019/20	2020/21 *(estimate)*	2021/22 *(forecast)*	2022/32 *(projection)*	*m/m change (m t)*	y/y change
EU-27 **(2020/21)** ***EU-27 + UK to 2019/20***	68.1	68.0	70.3	**71.0**	*n/a*	+0.9%
USA	346.0	358.4	383.9	**376.6**	*n/a*	-1.9%
Ukraine	35.9	30.3	41.9	**18.6**	*n/a*	-55.5%
Russia	14.3	13.9	14.6	**14.6**	*n/a*	+0.1%
Brazil	102.5	87.0	114.6	**123.1**	*n/a*	+7.5%
Argentina	58.5	60.5	57.0	**63.7**	*n/a*	+11.7%
China	260.8	260.7	272.6	**273.0**	*n/a*	+0.1%
World	1,127.3	1,131.7	1,210.0	**1,197.2**	***n/a***	**-1.1%**

World barley: IGC



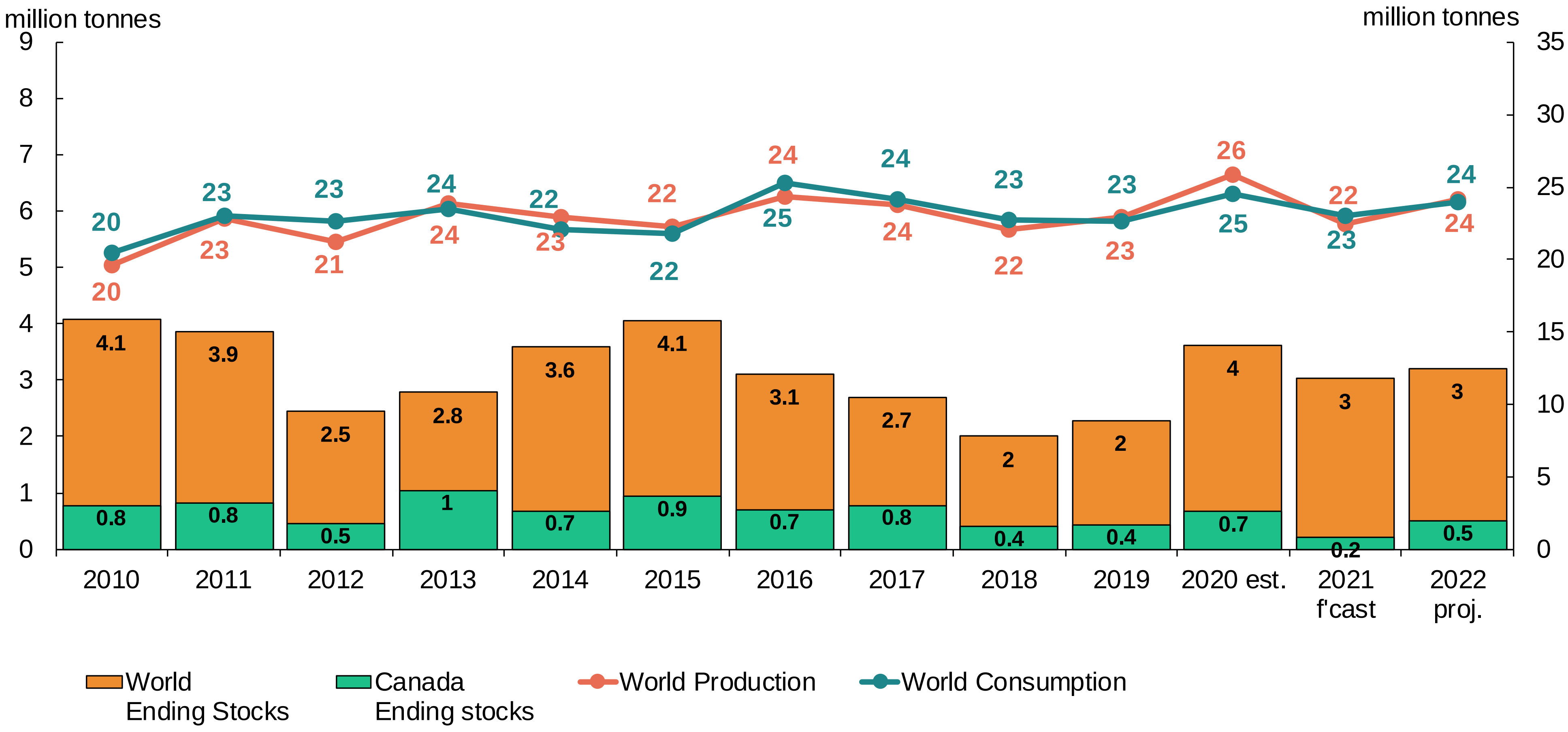
Source: IGC April report

Summary of the IGC Grain Market Report
(GMR 531 of 21/04/2022)
Outlook for 2022/23

Barley production in selected countries (million tonnes)

	2019/20	2020/21 *(estimate)*	2021/22 *(forecast)*	2022/23 *(projection)*	*m/m change (m t)*	y/y change
EU-27 (2020/21) *EU-27 + UK to 2019/20*	63.4	54.0	52.2	**53.1**	*n/a*	+1.8%
United Kingdom	8.2	8.1	7.0	**7.4**	*n/a*	+5.8%
Russia	19.9	20.6	17.6	**19.0**	*n/a*	+8.0%
Ukraine	9.5	7.9	10.0	**5.8**	*n/a*	-41.8%
Australia	10.1	13.1	13.7	**10.9**	*n/a*	-20.4%
Canada	10.4	10.7	6.9	**9.9**	*n/a*	+42.5%
Turkey	7.6	8.3	5.8	**7.5**	*n/a*	+30.4%
World	158.0	159.6	146.1	**148.6**	***n/a***	**+1.7%**

World oats: IGC



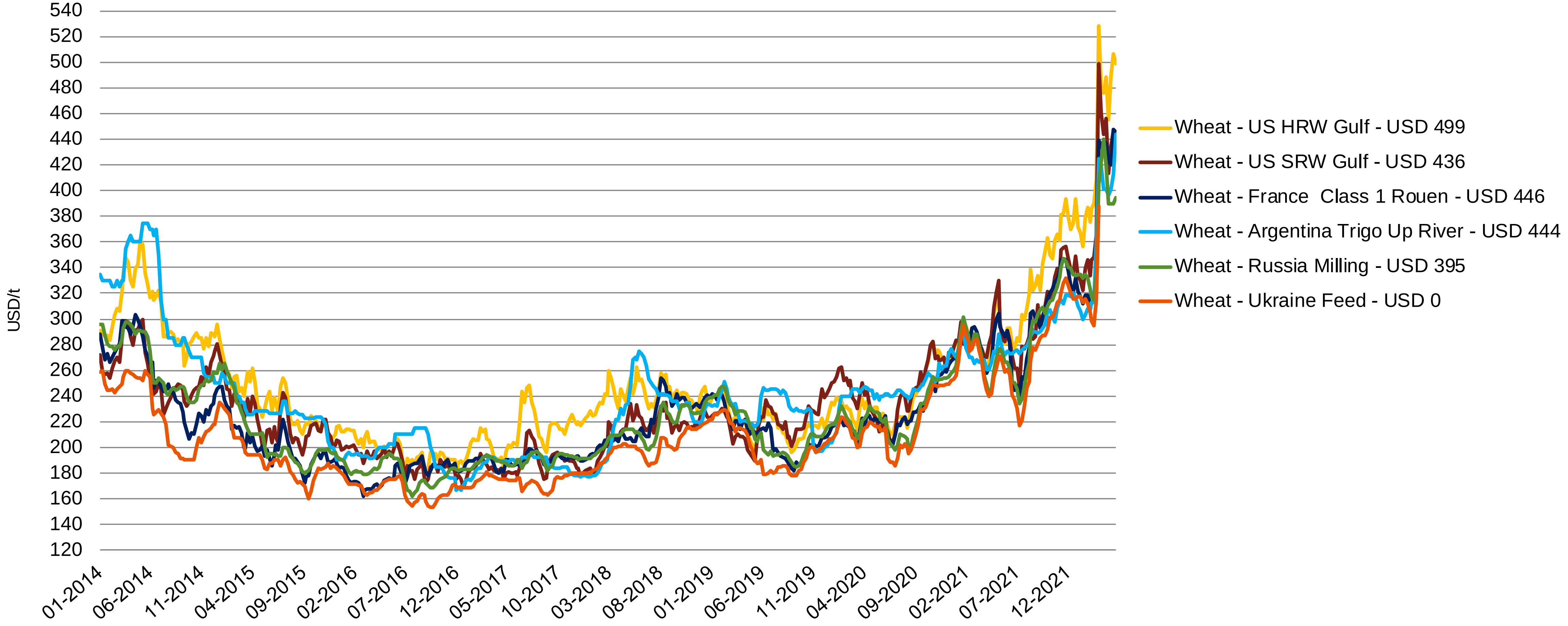
Source: IGC April report

Market News 7. (28-04-2022)
Canada: Principal field crop areas, March 2021

Statistics Canada: Principle field crop areas; 26 April 2022 *(Based on a survey conducted during 1/03-29/03 2022 incl. 11,500 farms.)*

26-04-2022	2020	2021	2022	y/y
Total wheat (m ha)	10.110	9.453	**10.130**	+7.2%
Durum wheat (m ha)	*2.302*	*2.238*	***2.519***	*+12.5%*
Spring wheat (m ha)	*7.254*	*6.670*	***7.136***	*+7.0%*
Winter wheat (m ha)	*554*	*546*	***475***	*-13.0%*
Barley (m ha)	3.060	3.357	**3.032**	-9.7%
Maize (m ha)	1.440	1.413	**1.503**	+6.4%
Canola (m ha)	8.411	9.097	**8.457**	-7.0%
Oats (m ha)	1.554	1.385	**1.616**	+16.6%
Soya beans (m ha)	2.052	2.153	**2.168**	+0.7%

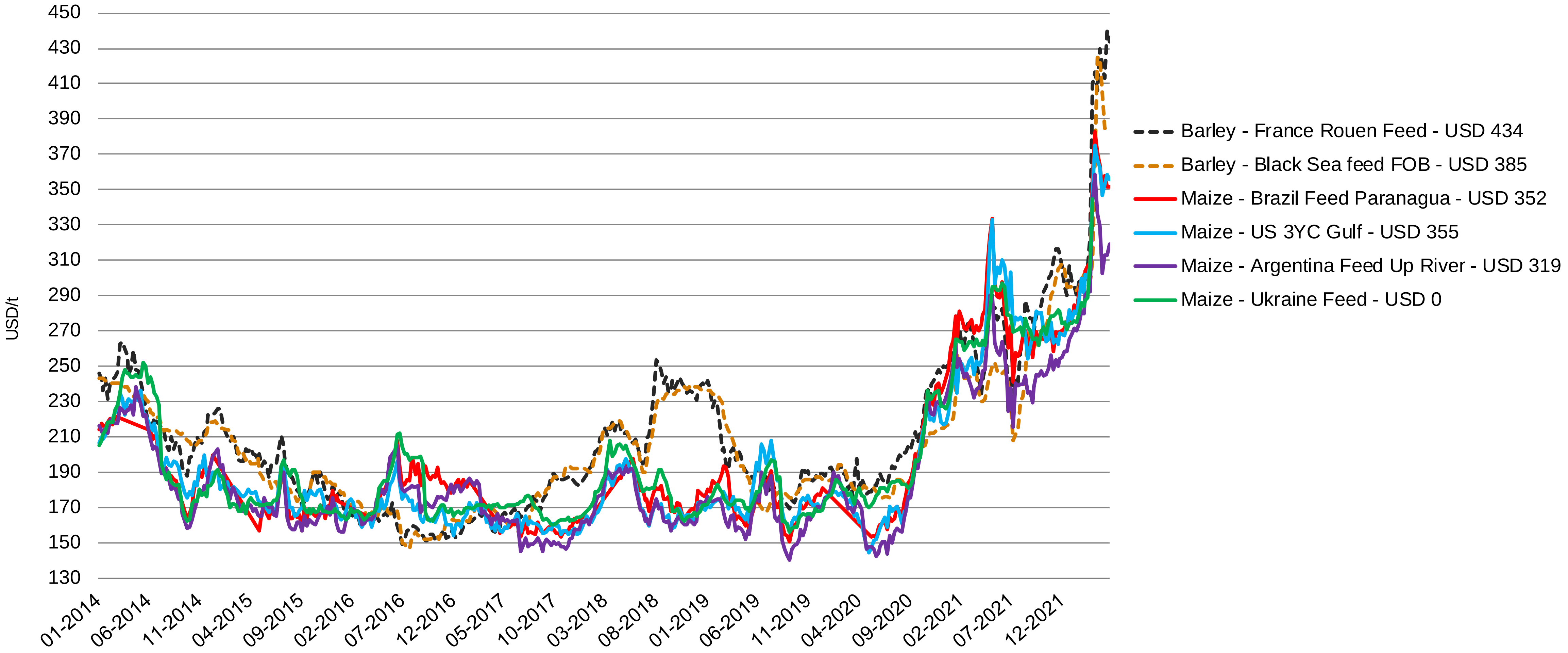
World common wheat prices (USD/t)



Source: IGC

Latest prices referring to (if not stated otherwise): 22-04-2022

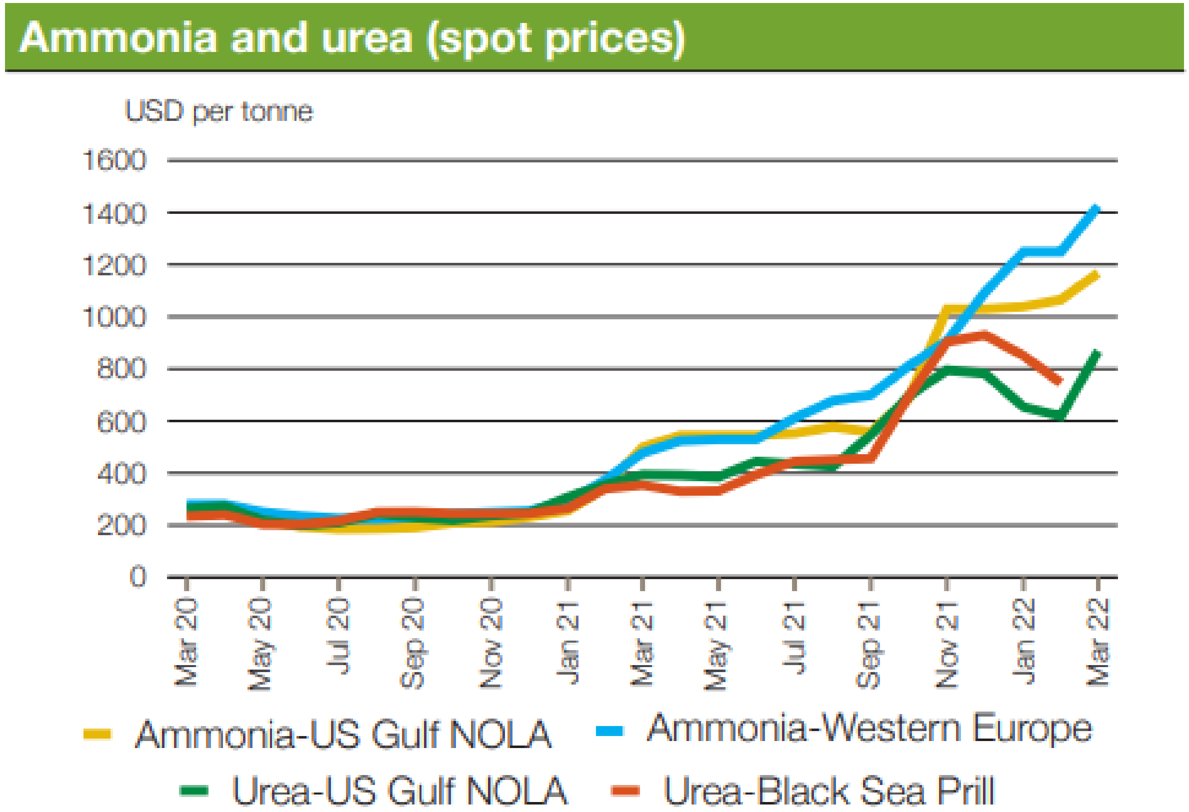
World maize and barley prices (USD/t)



Source: IGC
Latest prices referring to (if not stated otherwise): 22-04-2022

European Commission

Fertilizer outlook



Source: AMIS - Market Monitor

Questions for discussion

- Export restrictions by Serbia / Kazakhstan : potential followers?

- Expansion of Indian wheat exports: can India become a competitor for EU in North Africa in the longer term?

- EU wheat export prospects to North Africa in 2022/23.

- EU barley export prospects to Saudi Arabia in 2022/23 - any chance vs. AUS?

- EU Cereals (2021/22 Marketing Year)

EU27 2021/2022 Area

(million ha)

	2020/21	2021/22		
	Estimate	Mar. Forecast	Apr. Forecast	vs. 2020/21 (%)
Soft wheat	*20.8*	*21.7*	*21.7*	*4.4*
Durum wheat	*2.1*	*2.2*	*2.2*	*4.5*
Barley	*11.0*	*10.3*	*10.3*	*-6.4*
Maize	*9.4*	*9.2*	*9.1*	*-2.3*
Rye	*2.1*	*1.9*	*1.9*	*-7.3*
Oats	*2.6*	*2.6*	*2.6*	*0.2*
Total	**52.0**	**52.0**	**51.9**	-0.2

Source: DG AGRI - E4

EU27 2021/2022 Production

(million tonnes)

	2020/21	2021/22		
	Estimate	Mar. Forecast	Apr. Forecast	vs. 2020/21 (%)
Soft wheat	*118.3*	*130.0*	*130.0*	*9.9*
Durum wheat	*7.3*	*7.7*	*7.7*	*5.2*
Barley	*54.0*	*52.0*	*52.0*	*-3.7*
Maize	*68.0*	*72.5*	*72.3*	*6.3*
Rye	*8.7*	*7.8*	*7.8*	*-10.8*
Oats	*8.4*	*7.5*	*7.5*	*-10.8*
Total	**281.3**	**293.3**	**293.1**	4.2

Source: DG AGRI - E4

EU 2021/2022 Cereals Balance Sheet

(thousand metric tonnes)

LAST UPDATED: 28/04/2022

	2021/22 fc.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**8 933**	**4 534**	**2 170**	**20 341**	**847**	**1 256**	**1 242**	**2 127**	**353**	**41 803**
Usable production	130 018	51 972	7 727	72 257	7 769	799	7 471	11 543	3 563	293 119
Area (thousand ha)	*21 685*	*10 315*	*2 206*	*9 141*	*1 914*	*177*	*2 568*	*2 666*	*1 242*	*51 914*
Yield (tonnes/ha)	*6*	*5*	*4*	*8*	*4*	*5*	*3*	*4*	*3*	*6*
Imports (from third countries)	↑ 2 500	1 000	1 500	14 000	↑ 250	↑ 35	↑ 100	3	161	19 550
Total supply	**141 451**	**57 506**	**11 397**	**106 597**	**8 866**	**2 090**	**8 814**	**13 674**	**4 077**	**354 472**
Total domestic use	94 678	43 905	9 116	81 636	7 406	1 089	7 296	11 566	3 784	260 475
Human consumption	41 098	362	8 076	4 700	2 959	155	1 100	52	23	58 525
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	38 800	34 400	500	64 200	2 600	900	5 700	10 500	3 300	160 900
Losses	780	312	46	434	47	5	45	69	21	1 759
Exports (to third countries)	↓ 32 000	9 500	↑ 1 000	5 200	200	10	↑ 150	4	19	48 083
Total use	**126 678**	**53 405**	**10 116**	**86 836**	**7 606**	**1 099**	**7 446**	**11 569**	**3 803**	**308 558**
Ending stocks**	**14 773**	**4 101**	**1 281**	**19 761**	**1 261**	**991**	**1 368**	**2 104**	**274**	**45 914**
Change in stocks**	5 840	-432	-889	-579	413	-265	125	-23	-78	4 111

* Marketing year: from July to June

** At the end of the marketing year

European Commission

- EU Cereals (2022/23 Marketing Year)

EU27 2022/2023 Area

(million ha)

	2021/22	2022/23		
		Mar. Forecast	Apr. Forecast	vs. 2021/22 (%)
Soft wheat	*21.7*	*21.9*	*21.7*	*0.3*
Durum wheat	*2.2*	*2.1*	*2.1*	*-3.7*
Barley	*10.3*	*10.8*	*10.8*	*5.1*
Maize	*9.1*	*9.4*	*9.3*	*2.2*
Rye	*1.9*	*2.0*	*2.0*	*5.5*
Oats	*2.6*	*2.5*	*2.5*	*-1.4*
Total	**51.9**	52.9	52.7	1.5

Source: DG AGRI - E4

EU27 2022/2023 Production

(million tonnes)

	2021/22	2022/23		
		Mar. Forecast	Apr. Forecast	vs. 2021/22 (%)
Soft wheat	*130.0*	*131.3*	*130.1*	*0.0*
Durum wheat	*7.7*	*7.5*	*7.5*	*-2.3*
Barley	*52.0*	*53.6*	*53.5*	*2.9*
Maize	*72.3*	*74.0*	*73.4*	*1.6*
Rye	*7.8*	*8.1*	*8.0*	*3.6*
Oats	*7.5*	*7.5*	*7.5*	*0.5*
Total	**293.1**	**297.7**	**295.8**	**0.9**

Source: DG AGRI - E4

EU 2022/2023 Usable Production: comparison with other forecasters

(million tonnes)

	EC DG AGRI 28-April	Stratégie Grains 14-April	COCERAL 15-March
Soft Wheat	*130.1*	*126.7*	*126.9*
Durum Wheat	*7.5*	*7.8*	*7.7*
Barley	*53.5*	*51.9*	*51.8*
Maize	*73.4*	*67.1*	*67.2*
Rye	*8.0*	*7.6*	*8.4*
Total Cereals	**295.8**	**283.8**	**282.6**

EU 2022/2023 Cereals Balance Sheet

(thousand metric tonnes)

LAST UPDATED: 28/04/2022

	2022/23 proj.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**14 773**	**4 101**	**1 281**	**19 761**	**1 261**	**991**	**1 368**	**2 104**	**274**	**45 914**
Usable production	130 068	53 472	7 549	73 434	8 050	834	7 510	11 012	3 853	295 782
Area (thousand ha)	*21 747*	*10 839*	*2 125*	*9 341*	*2 019*	*170*	*2 532*	*2 563*	*1 373*	*52 708*
Yield (tonnes/ha)	*6*	*5*	*4*	*8*	*4*	*5*	*3*	*4*	*3*	*6*
Imports (from third countries)	1 000	1 000	2 500	9 000	134	179	66	2	163	14 043
Total supply	**145 841**	**58 574**	**11 330**	**102 195**	**9 445**	**2 004**	**8 944**	**13 117**	**4 291**	**355 740**
Total domestic use	93 232	44 603	9 158	79 763	7 475	1 108	7 416	11 563	3 852	258 170
Human consumption	41 416	364	8 118	4 725	2 975	156	1 106	52	23	58 935
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	8 800	6 700	95	11 600	1 500		101	445	170	29 410
of which bioethanol/biofuel	*2 800*	*437*		*6 500*	*900*			*344*	*14*	*10 995*
Animal feed	37 636	35 088	500	62 595	2 652	918	5 814	10 500	3 366	159 069
Losses	780	321	45	441	48	5	45	66	23	1 775
Exports (to third countries)	40 000	9 625	1 099	4 363	197	15	168	5	19	55 492
Total use	**133 232**	**54 229**	**10 257**	**84 126**	**7 672**	**1 123**	**7 584**	**11 568**	**3 871**	**313 662**
Ending stocks**	**12 609**	**4 345**	**1 073**	**18 069**	**1 772**	**881**	**1 360**	**1 550**	**419**	**42 078**
Change in stocks**	-2 164	244	-208	-1 692	512	-111	-8	-554	145	-3 836

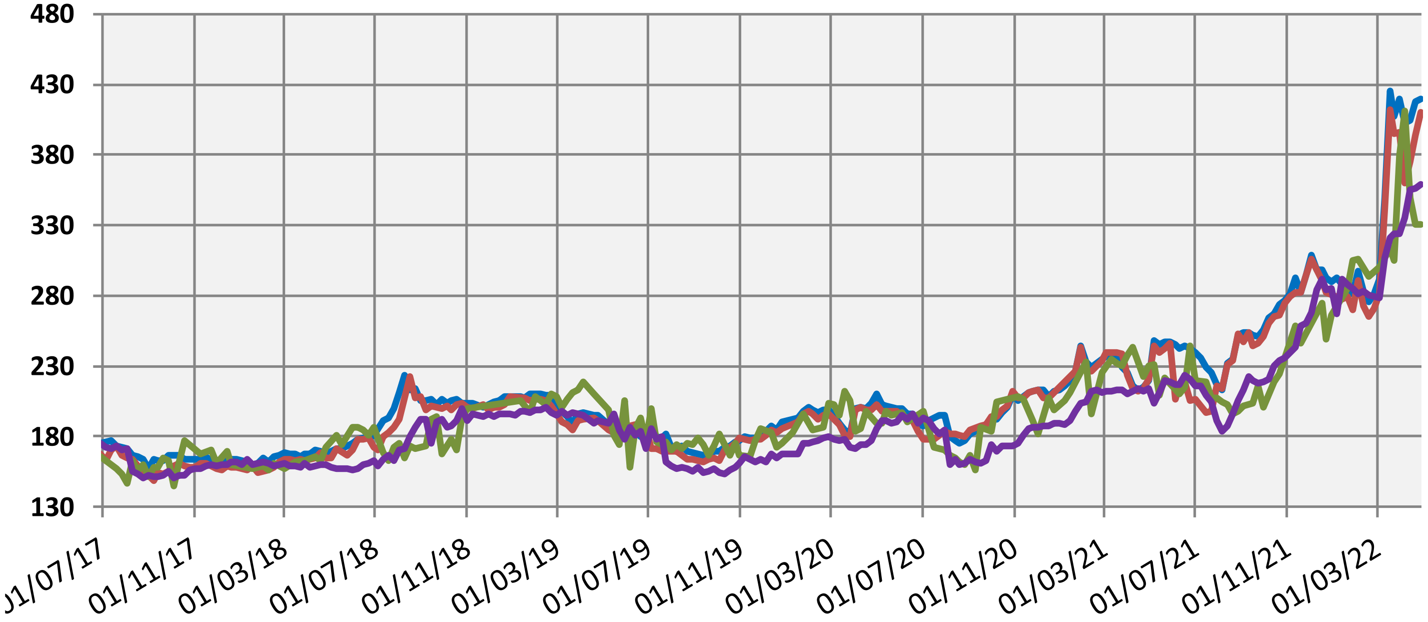
* Marketing year: from July to June

** At the end of the marketing year

European Commission

- EU Cereals (prices)

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



Germany (Hamburg)	France (Rouen)	Romania (Constanta)	Poland national average (Zachodni until mid-July 2021)

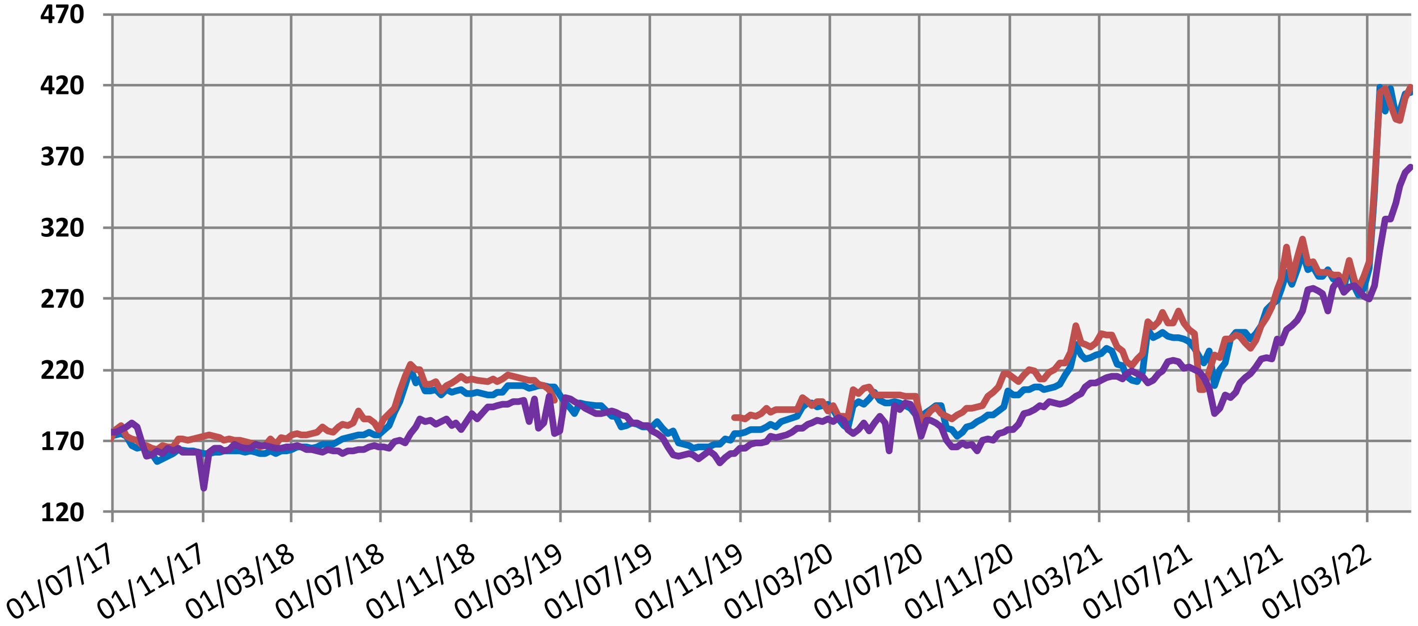
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

France
(DELPORT Rouen)

- EUR 410 per tonne; +3.5% month-on-month; +86.0% year-on-year

European Commission

EU market prices for feed wheat – (EUR per tonne)



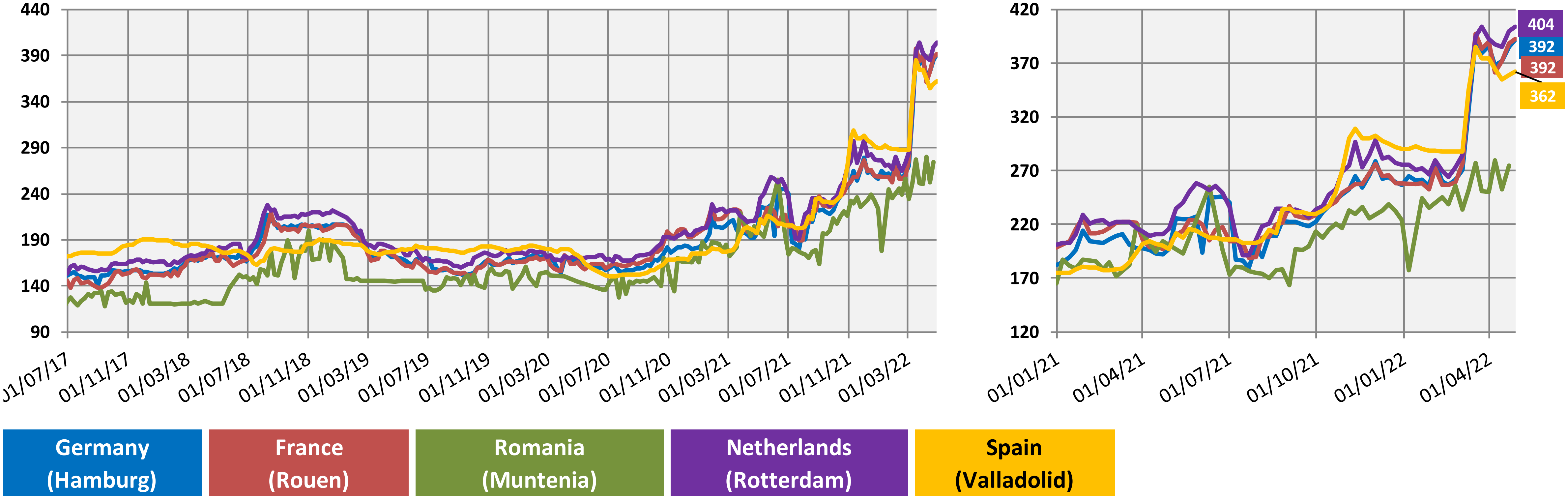
Germany (Hamburg) | Netherlands (Rotterdam) | Poland national average (Zachodni until mid-July 2021)

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

Germany
(DEPSILO Hamburg)

- EUR 415 per tonne; -0.6% month-on-month; +89.9% year-on-year

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



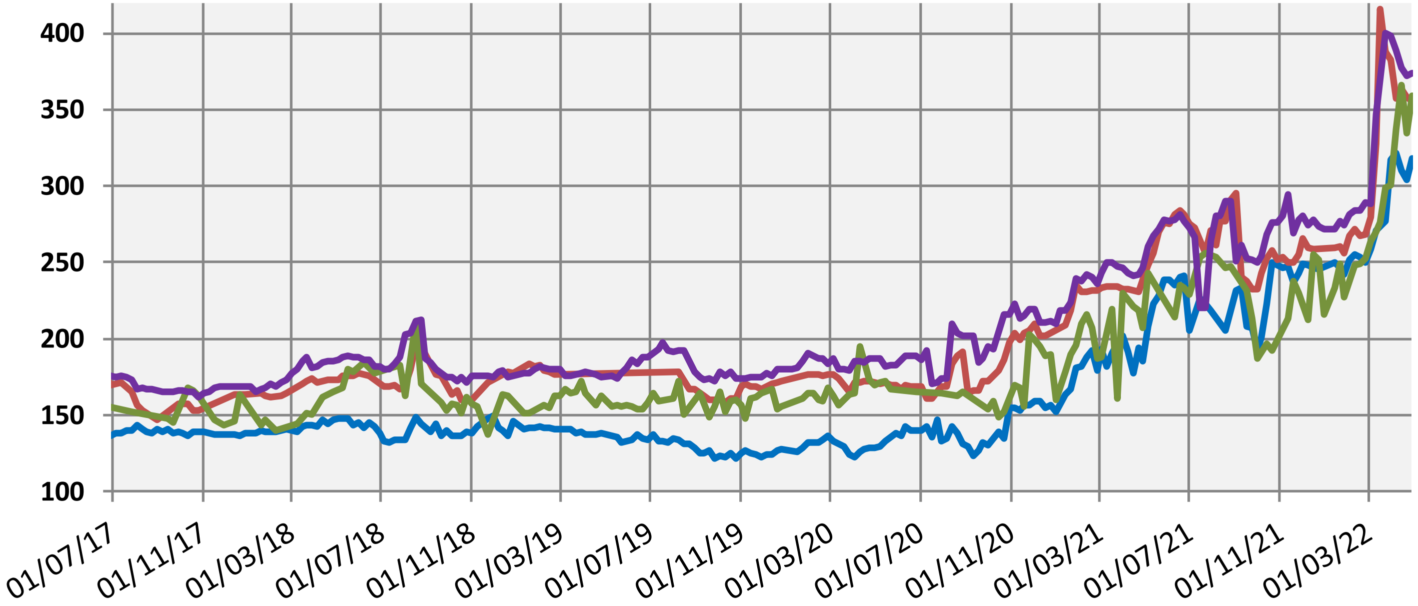
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

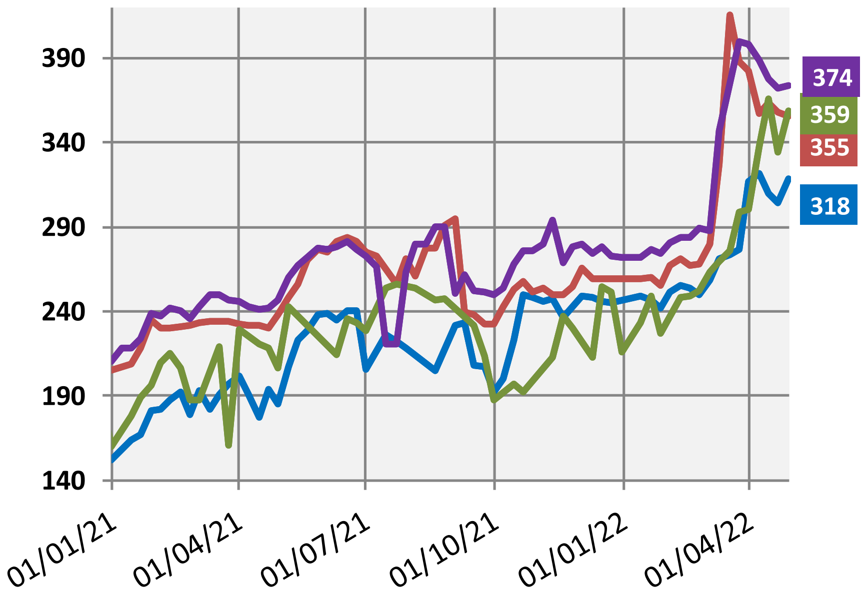
France
(DELPORT Rouen)

- EUR 392 per tonne; +0.5% month-on-month; +95.3% year-on-year

European Commission

EU market prices for maize – (EUR per tonne)





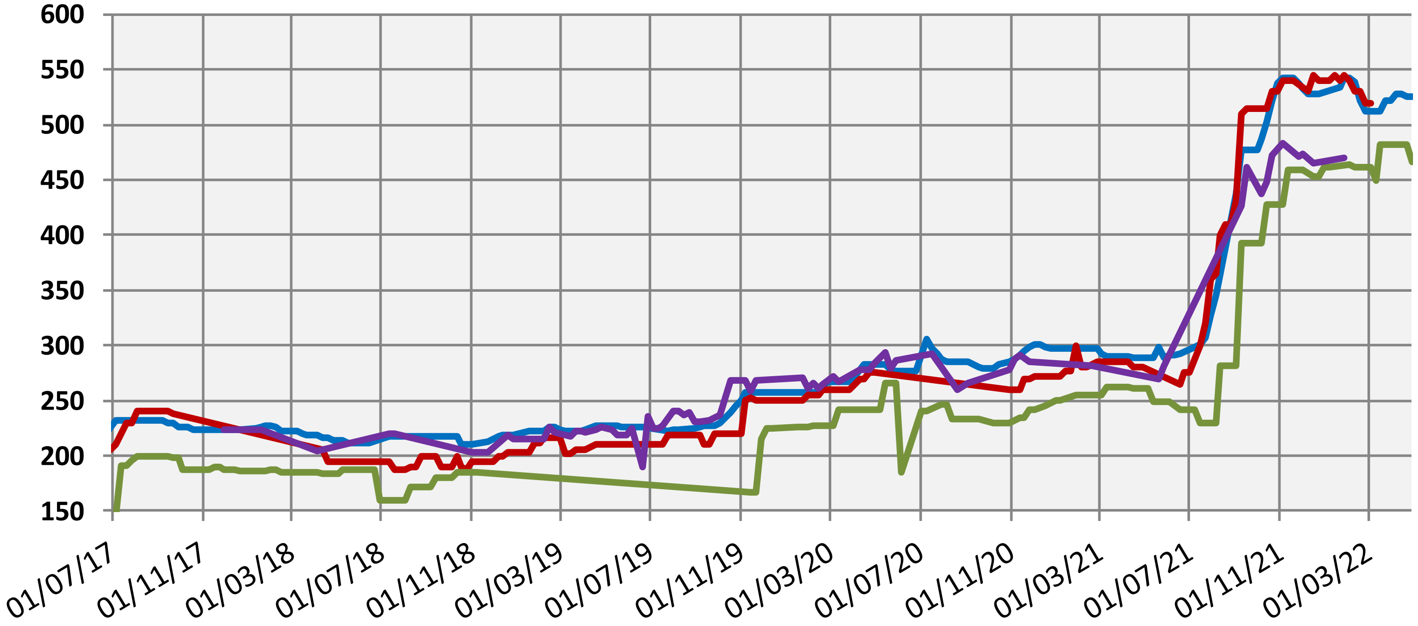
Hungary (Great Plain)	France (Rhin)	Romania (Constanta)	Netherlands (Rotterdam)

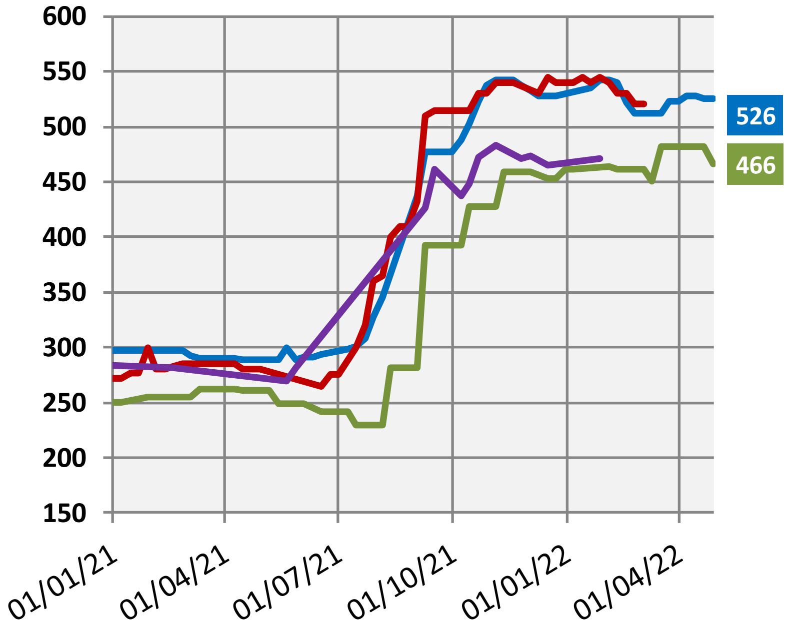
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

Hungary
(FGATE Great Plain)

- EUR 318 per tonne; +0.4% month-on-month; +71.6% year-on-year

EU market prices for durum wheat – (EUR per tonne)





Italy (Bologna)	Spain (Sevilla)	Greece (Kilkis)	France (La Pallice)

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

Italy
(DELFIRST Bologna)

- EUR 526 per tonne; +0.6% month-on-month; +81.8% year-on-year

Price evolution compared to the week of 14 February

				week before the invasion of UA	
EUR/tonne	**Week of 18 April**	**% change -1yr**	**% change compared to the week before the invasion**	**Week of 14 February**	**% change -1yr**
Milling wheat					
France - Rouen (DELPORT)	410	86.0%	51.1%	271	15.9%
Germany - Hamburg (DEPSILO)	420	91.3%	49.5%	281	19.6%
Feed wheat					
Germany - Hamburg (DEPSILO)	415	89.9%	49.5%	278	20.7%
Netherlands - Rotterdam (CIF)	419	80.8%	46.6%	286	19.5%
Feed barley					
Germany - Hamburg (DEPSILO)	392	99.0%	49.6%	262	27.2%
France - Rouen (DELPORT)	392	95.3%	51.2%	260	19.6%
Maize					
Romania - Constanta (FOB)	359	73.8%	42.4%	252	34.5%
France - Rhin(FOB)	355	49.1%	32.5%	268	15.9%
Hungary - Great Plain (FGATE)	318	71.6%	27.2%	250	39.8%

European Commission

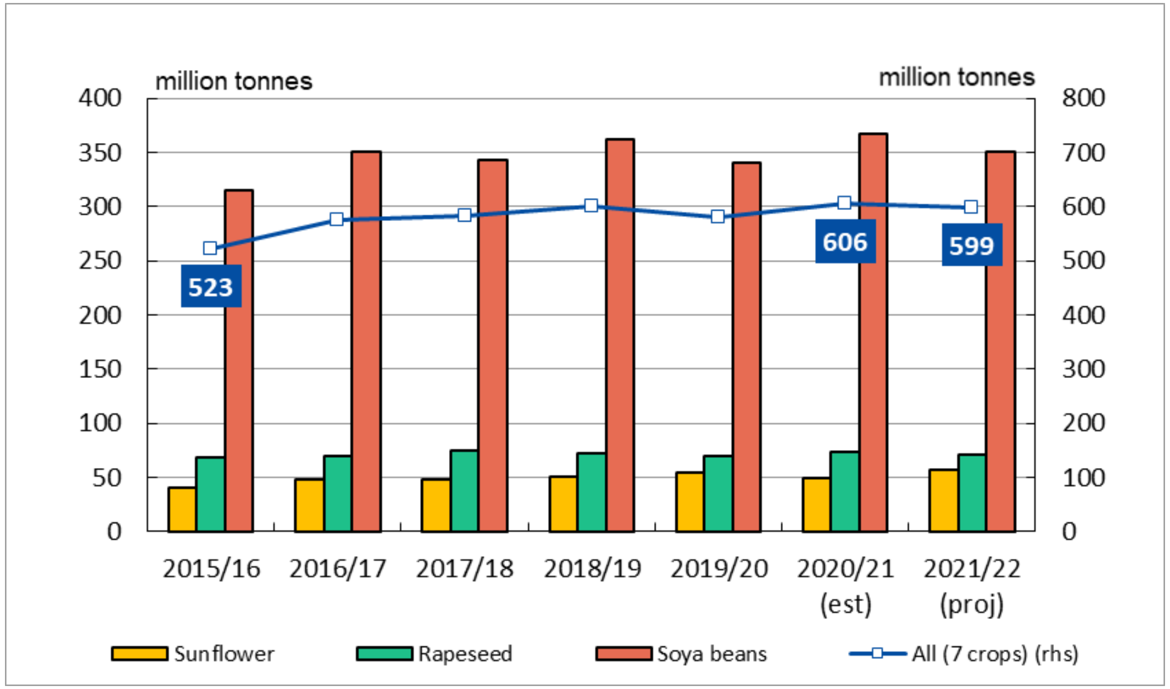
Questions for discussion

- EU soft wheat export potential
- spring planting
- winter crops conditions

Oilseeds

- World Oilseeds market & prices

2021/22 World Oilseeds (USDA)



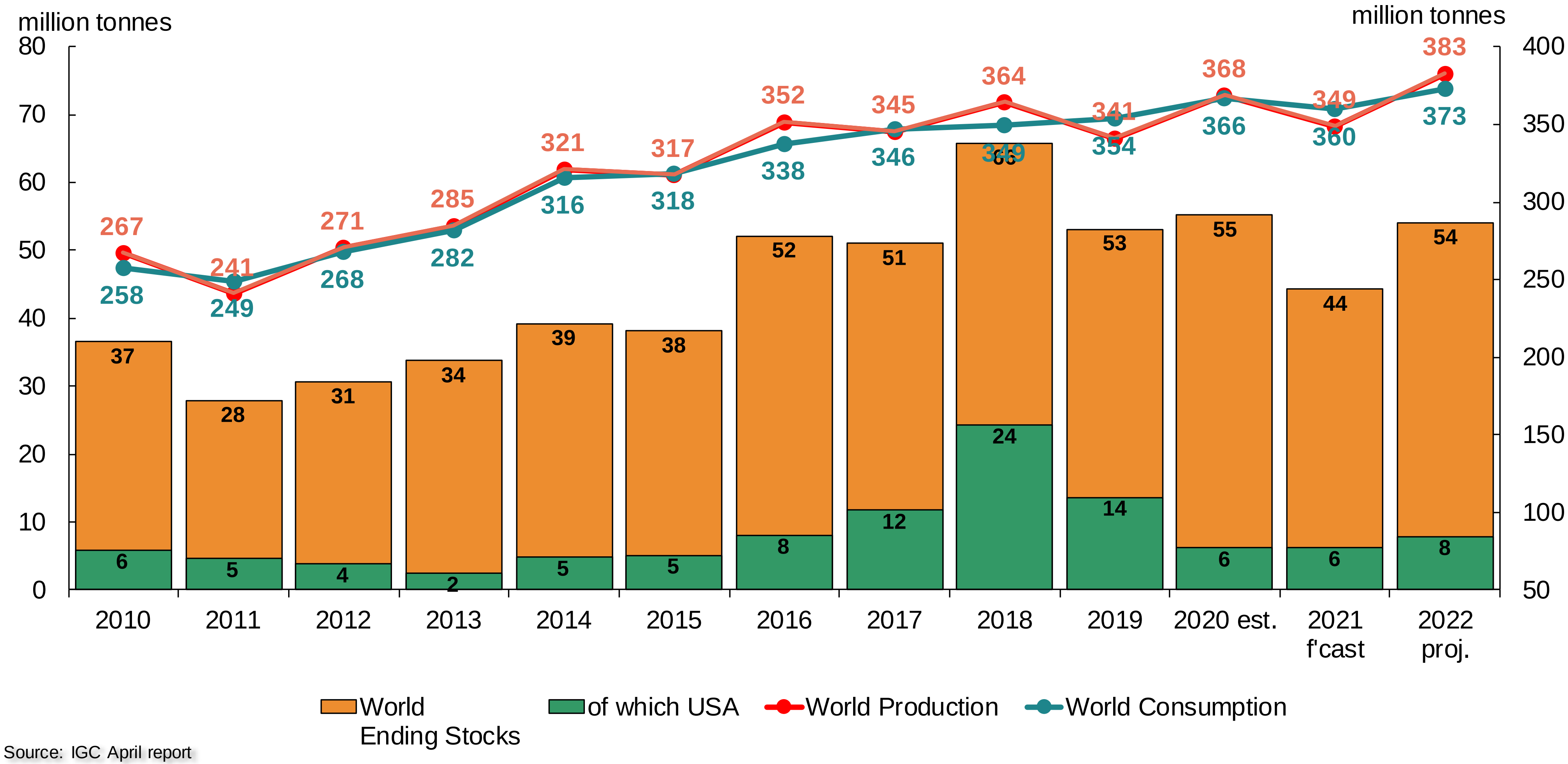
21/22 outlook (changes y/y):

Total Oilseeds: **599 mt** (-7)

- Soya beans: 350 mt
- Rapeseed: 71 mt
- Sunflower: 57 mt

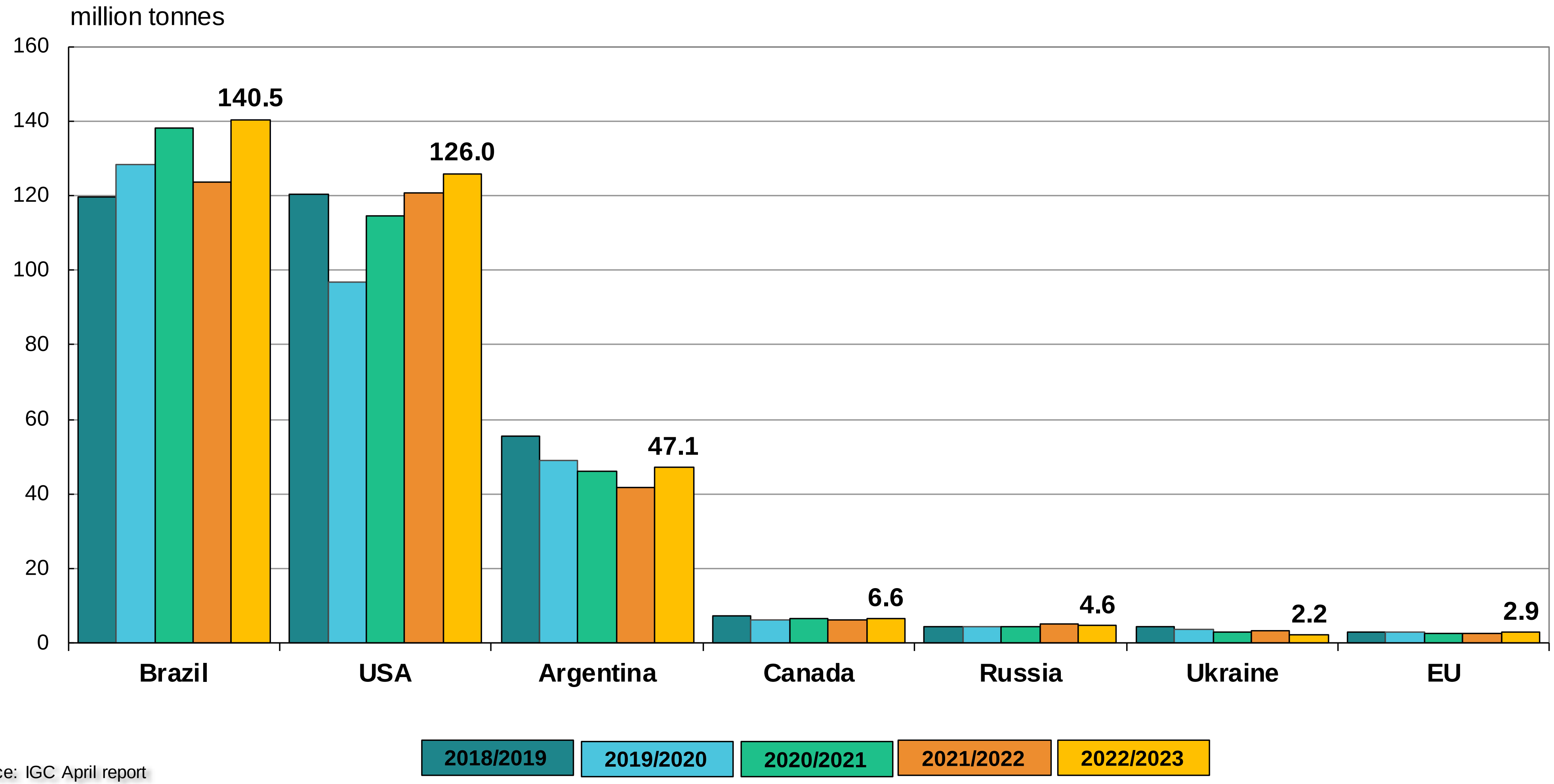
European Commission

World soya: IGC



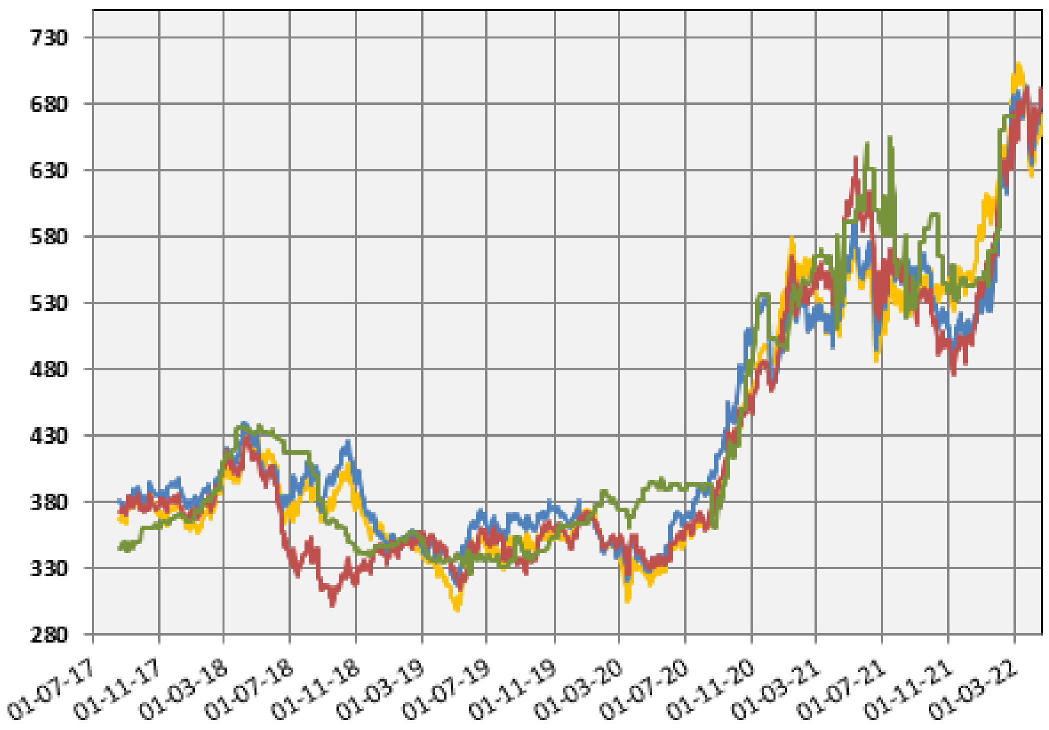
Source: IGC April report

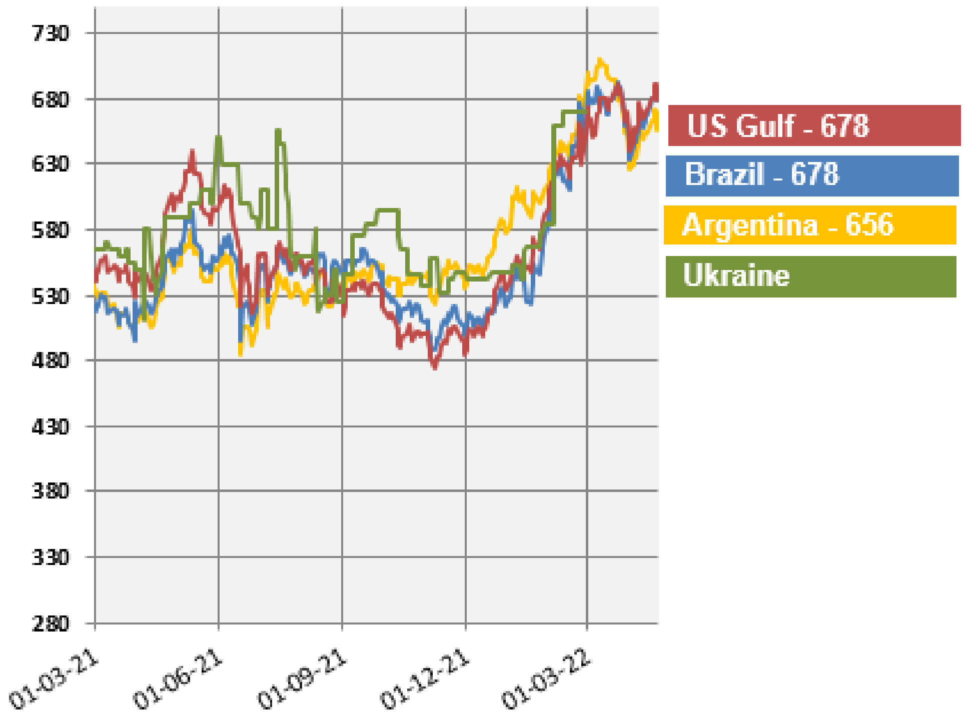
IGC: soya beans production forecast



Source: IGC April report

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



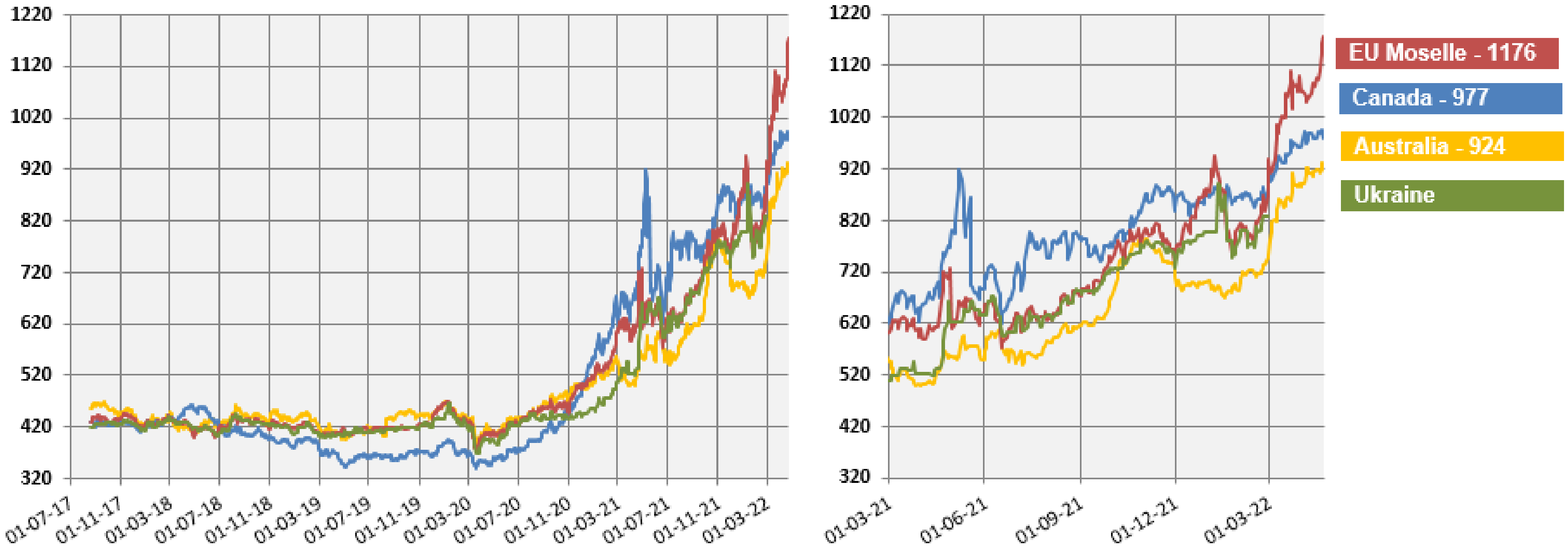


Source: International Grains Council

Latest prices referring to 22-04-2022

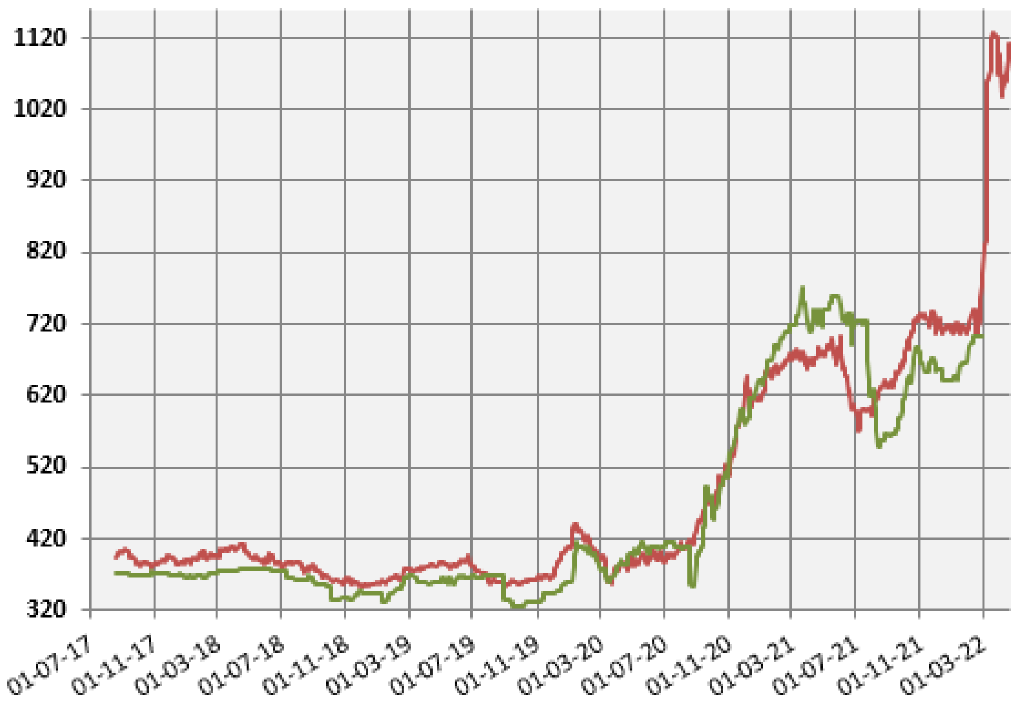
European Commission

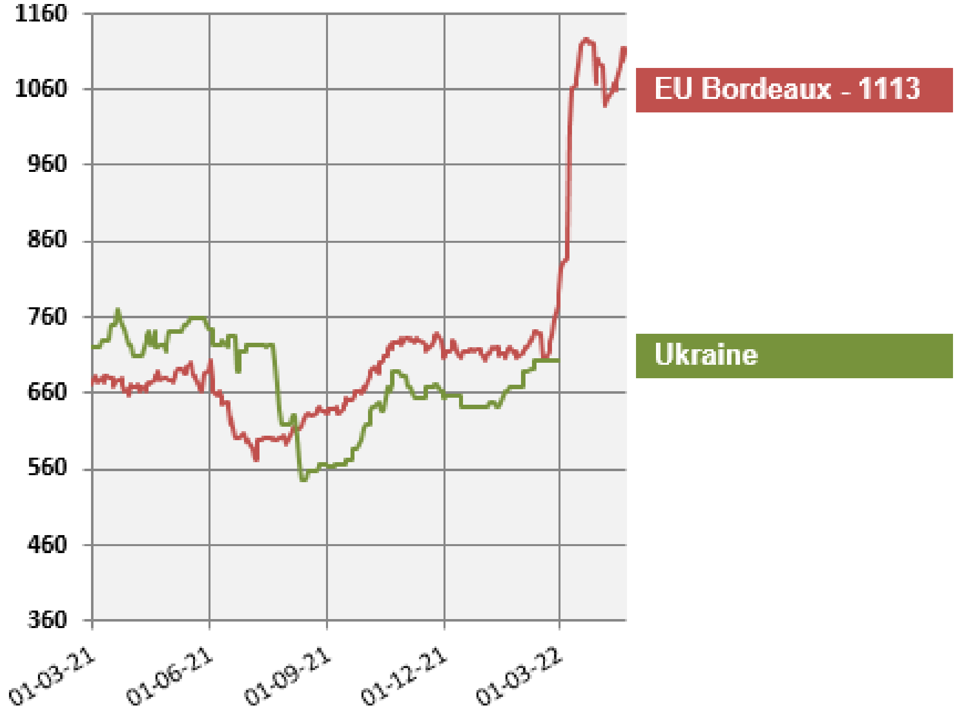
World export prices for rapeseed – (USD/tonne)



Source: International Grains Council
Latest prices referring to 22-04-2022

World export prices for sunflower – (USD/tonne)





Source: International Grains Council
Latest prices referring to 22-04-2022

European Commission

World export prices for vegetable oils – (USD/tonne)

fob, US$/t	28 April 2022	%change -1yr	%change compared to the day before the invasion	23 February 2022 *(One day before the invasion of UA)*	%change -1yr
Soya oil					
Argentina	1985	54%	22%	1630	50%
Brazil	1943	48%	21%	1610	50%
US (Gulf)	2069	25%	25%	1653	45%
Rapeseed oil					
Canada (Vancouver)	2140	34%	22%	1751	29%
Sunflower oil					
Argentina	2010	32%	35%	1490	12%
Ukraine	n/a	n/a	n/a	1475	5%
Palm oil					
Indonesia	1870	56%	15%	1630	52%
Malaysia	1850	61%	14%	1618	58%

Source: IGC

European Commission

- EU Oilseeds 2021/22 – 2022/23 (Marketing Year)

EU oilseeds 2022/23 projections

EU OILSEEDS AREA

(million hectares)

	5-year trimmed average	2021/22	2022/23 April	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Rapeseed	*5.62*	*5.34*	*5.71*	*6.9*	*1.6*
Sunflower	*4.37*	*4.49*	*4.69*	*4.4*	*7.3*
Soya Beans	*0.95*	*0.95*	*0.97*	*2.1*	*1.8*
TOTAL	**10.93**	**10.77**	**11.36**	**5.5**	**3.9**

EU OILSEEDS PRODUCTION

(million tonnes)

	5-year trimmed average	2021/22	2022/23 April	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Rapeseed	*17.24*	*17.02*	*18.32*	*7.6*	*6.2*
Sunflower	*10.21*	*10.50*	*11.17*	*6.4*	*9.5*
Soya Beans	*2.70*	*2.68*	*2.87*	*7.0*	*6.4*
TOTAL	**29.58**	**30.20**	**32.36**	**7.2**	**7.4**

Sources : EC - DG AGRI.

European Commission

EU protein crops 2022/23 projections

EU PROTEIN CROPS AREA

(million hectares)

	5-year trimmed average	2021/22	2022/23 April	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Field peas	*0.83*	*0.85*	*0.93*	*9.9*	*12.4*
Broad beans	*0.47*	*0.48*	*0.53*	*10.0*	*13.2*
Sweet lupins	*0.19*	*0.24*	*0.27*	*9.8*	*41.3*
TOTAL	**1.49**	**1.57**	**1.73**	**9.9**	**16.3**

EU PROTEIN CROPS PRODUCTION

(million tonnes)

	5-year trimmed average	2021/22	2022/23 April	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Field peas	*2.04*	*2.11*	*2.47*	*16.8*	*21.1*
Broad beans	*1.17*	*1.22*	*1.52*	*24.1*	*29.5*
Sweet lupins	*0.27*	*0.35*	*0.37*	*7.1*	*35.6*
TOTAL	**3.51**	**3.68**	**4.36**	**18.3**	**24.0**

Sources : EC - DG AGRI.

European Commission

- S&D balance sheet (Oilseeds, Meals, Oils, Protein Crops)

Oilseeds balance sheet (EU)

OILSEEDS SUPPLY & DEMAND *(thousand metric tonnes)*

last updated: 28/04/2022	2021/22 fc.				2022/23 proj.			
	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	17 019	2 683	10 499	30 201	18 318	2 872	11 174	32 364
Area (thousand ha)	5 340	948	4 487	10 774	5 708	968	4 686	11 361
Yield (tonnes/ha)	3.19	2.83	2.34	2.80	3.21	2.97	2.38	2.85
Imports (from third countries)	4 900	14 500	700	20 100	4 000	15 000	347	19 347
Total supply	**22 419**	**18 283**	**11 899**	**52 601**	**22 818**	**19 072**	**12 387**	**54 277**
Domestic use	21 419	16 866	10 732	49 018	22 003	17 649	11 215	50 868
of which crushing	*(20 673)*	*(14 875)*	*(9 496)*	*(45 044)*	*(21 231)*	*(15 552)*	*(9 937)*	*(46 720)*
Exports (to third countries)	500	217	300	1 017	314	223	305	843
Total use	**21 919**	**17 083**	**11 032**	**50 035**	**22 318**	**17 872**	**11 521**	**51 710**
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)*

last updated: 28/04/2022	2021/22 fc.				2022/23 proj.			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	50	342	100	492	50	342	100	492
Usable production	11 784	11 751	5 223	28 758	12 102	12 286	5 465	29 853
Imports (from third countries)	600	16 700	2 300	19 600	502	16 701	1 000	18 203
Total supply	12 434	28 794	7 623	48 850	12 654	29 329	6 565	48 548
Domestic use	11 759	27 688	7 023	46 470	12 013	28 231	5 905	46 149
Exports (to third countries)	624	764	500	1 888	591	755	560	1 906
Total use	12 384	28 452	7 523	48 358	12 604	28 986	6 465	48 056
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)*

last updated: 28/04/2022	2021/22 fc.					2022/23 proj.				
	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	8 476	2 975	3 988	0	15 439	8 705	3 110	4 173	0	15 989
Imports (from third countries)	600	600	1 900	5 400	8 500	425	250	884	4 590	6 149
Total supply	9 667	3 750	6 158	5 889	25 464	9 721	3 535	5 327	5 078	23 662
Domestic use	8 676	2 725	5 438	5 201	22 040	8 765	2 560	4 757	4 374	20 457
Exports (to third countries)	400	850	450	200	1 900	365	800	300	215	1 680
Total use	9 076	3 575	5 888	5 401	23 940	9 130	3 360	5 057	4 589	22 137
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

European Commission

Protein crops

Protein crops balance sheet (EU)

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

last updated 28/04/2022	2022/23 projections								
	Peas	Broad beans	Sweet lupins	Chick peas	Lentils	Other dry pulses	TOTAL	TOTAL 21/22	Change 21/22
Beginning stocks	-	-	-	-	-	-	-	-	-
Usable production	2 469	1 516	374	175	113	563	5 211	4 550	14.5%
Imports	516	90	190	135	208	376	1 516	1 514	0.1%
Total supply	**2 986**	**1 606**	**564**	**310**	**322**	**939**	**6 727**	**6 064**	**10.9%**
Domestic use	2 760	1 310	564	288	316	915	6 152	5 590	10.0%
- Food	*(941)*	*(250)*	*(5)*	*(288)*	*(316)*	*(517)*	*(2 316)*	*(2 198)*	*5.4%*
- Feed	*(1 819)*	*(1 060)*	*(559)*	*(0)*	*(0)*	*(398)*	*(3 836)*	*(3 393)*	*13.1%*
Exports	225	296	0	23	6	24	575	473	21.4%
Total Use	**2 986**	**1 606**	**564**	**310**	**322**	**939**	**6 727**	**6 064**	**10.9%**
Ending stocks	-	-	-	-	-	-	-	-	-

sources: EC - DG AGRI

Questions for discussion

- Impact of Indonesia ban of the global and EU market

- EU sunflower oil supply

- EU biodiesel production

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