



Crops Market Observatory

Impacts of Ukraine/Russia crisis

5 April 2022

AGRI-E4



EU supply situation

Cereal : EU Cereals Supply & Demand 2021/22

(thousand metric tonnes)

LAST UPDATED: 01/04/2022

	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	2 128	353	41 803
Usable production	129 971	51 964	7 720	72 469	7 767	891	7 470	11 532	3 563	293 347
Area (thousand ha)	21 676	10 314	2 203	9 206	1 914	174	2 568	2 664	1 242	51 961
Yield (tonnes/ha)	6	5	4	8	4	5	3	4	3	6
Imports (from third countries)	2 000	1 000	1 500	14 000	200	20	32	3	161	18 917
Total supply	140 904	57 498	11 390	106 810	8 814	2 167	8 744	13 663	4 077	354 067
Total domestic use	94 678	43 904	9 116	81 637	7 406	1 089	7 296	11 566	3 784	260 476
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
<i>of which bioethanol/biofuel</i>	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	435	47	5	45	69	21	1 760
Exports (to third countries)	33 000	9 500	800	5 200	200	10	130	4	19	48 863
Total use	127 678	53 404	9 916	86 837	7 606	1 099	7 426	11 569	3 803	309 339
Ending stocks**	13 226	4 094	1 474	19 973	1 209	1 068	1 318	2 093	274	44 728
Change in stocks**	4 293	-440	-696	-368	362	-188	76	-34	-78	2 925

* Marketing year: from July to June

** At the end of the marketing year

Cereals – EU Trade

Cumul of weeks 1 to 39

<i>Customs Surveillance</i> (tonnes)	EU* 01/07/2021 - 27/03/2022		EU + UK 01/07/2020 - 28/03/2021		EU + UK 01/07/2019 - 29/03/2020	
	Export	Import	Export	Import	Export	Import
Common wheat	19 871 140	1 901 219	20 476 366	1 658 329	25 623 736	1 654 539
Common wheat flour (grain equivalent)	395 875	178 480	335 236	58 496	433 811	20 385
Durum wheat	714 624	1 053 514	287 287	2 000 979	763 717	1 459 298
Durum wheat meal (grain equivalent)	160 245	3 611	177 788	1 938	177 752	1 073
Total Wheat	21 141 885	3 136 825	21 276 678	3 719 742	26 999 017	3 135 294
Barley	5 786 414	684 742	6 005 287	268 274	5 870 780	561 890
Malt (grain equivalent)	2 187 010	19 817	2 276 952	10 101	2 092 310	13 101
Maize	4 394 617	12 054 885	1 917 103	12 104 498	3 994 046	15 952 650
Rye	138 081	216 500	140 859	5 094	208 552	3 248
Oats	116 507	75 492	75 449	12 024	151 303	2 557
Sorghum	8 710	26 443	3 314	12 022	1 511	39 732
Total Coarse grains	12 631 339	13 077 879	10 418 964	12 412 012	12 318 501	16 573 177
General Total	33 773 224	16 214 704	31 695 642	16 131 754	39 317 518	19 708 471

* The United Kingdom is no longer a Member State of the European Union, however until the end of the transition period it was still a part of the EU Customs Union. Due to the absence of intra-trade data in the surveillance system, the totals of the EU trade data therefore also include the UK data until 31/12/2020. The data as of 1/1/2021 is therefore not comparable with the data until 31/12/2020.

Source: TAXUD Surv. Data

Cereals – EU Trade

Top 5 import origins* - (update of 29 March 2022)

Common wheat				
Origin	MY 2021/22		MY 2020/21	
	tonnes	share	tonnes	share
Russia	392 361	20.6%	258 694	15.6%
Ukraine	328 383	17.3%	603 331	36.4%
Serbia	312 391	16.4%	107 474	6.5%
United Kingdom	244 764	12.9%	3 196	0.2%
Moldova	177 037	9.3%	12 672	0.8%

Common wheat flour (grain equivalent)				
Origin	MY 2021/22		MY 2020/21	
	tonnes	share	tonnes	share
United Kingdom	154 319	86.5%	37 890	64.8%
Serbia	5 860	3.3%	2 746	4.7%
Mauritius	5 209	2.9%	5 776	9.9%
Moldova	4 477	2.5%	1 507	2.6%
India	3 894	2.2%	6 666	11.4%

Barley				
Origin	MY 2021/22		MY 2020/21	
	tonnes	share	tonnes	share
United Kingdom	564 024	82.4%	184 548	68.8%
Ukraine	79 476	11.6%	38 832	14.5%
Serbia	21 830	3.2%	19 697	7.3%

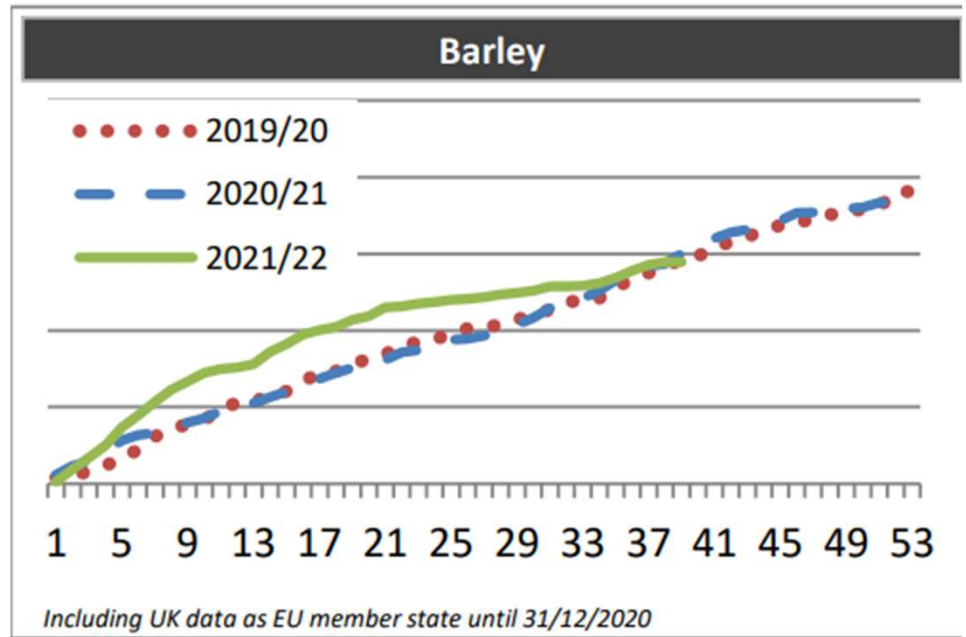
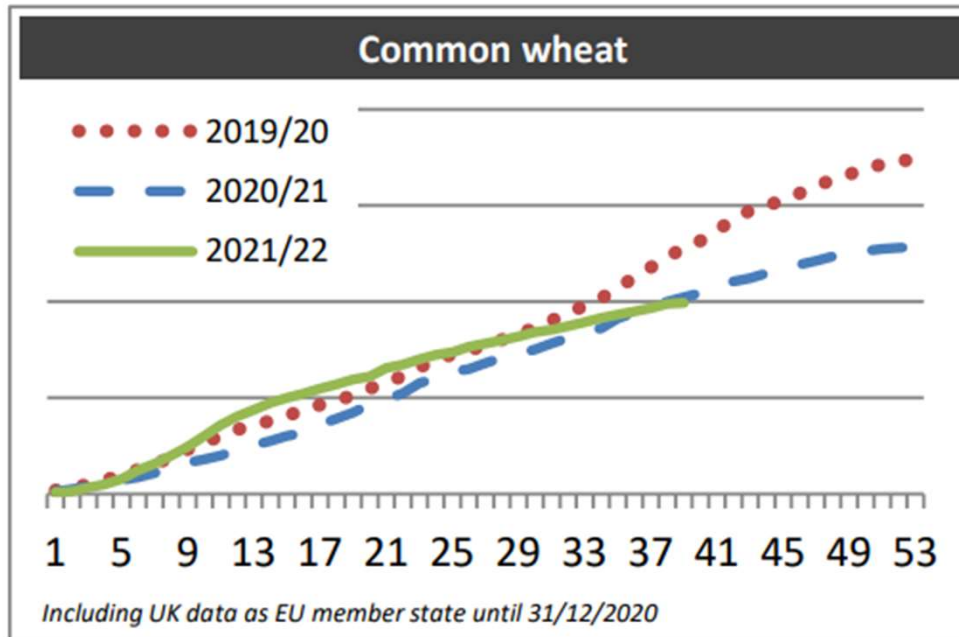
Malt (grain equivalent)				
Origin	MY 2021/22		MY 2020/21	
	tonnes	share	tonnes	share
United Kingdom	11 878	59.9%	5 064	50.1%
Serbia	6 348	32.0%	4 150	41.1%
Ukraine	1 257	6.3%	0	0.0%

Maize				
Origin	MY 2021/22		MY 2020/21	
	tonnes	share	tonnes	share
Ukraine	6 602 922	54.8%	5 003 621	41.3%
Brazil	3 309 554	27.5%	4 495 050	37.1%
Serbia	616 583	5.1%	1 286 006	10.6%
Canada	590 209	4.9%	683 061	5.6%
Russia	370 554	3.1%	241 124	2.0%

Rye				
Origin	MY 2021/22		MY 2020/21	
	tonnes	share	tonnes	share
Ukraine	117 961	54.5%	6	0.1%
Russia	84 910	39.2%	-----	-----

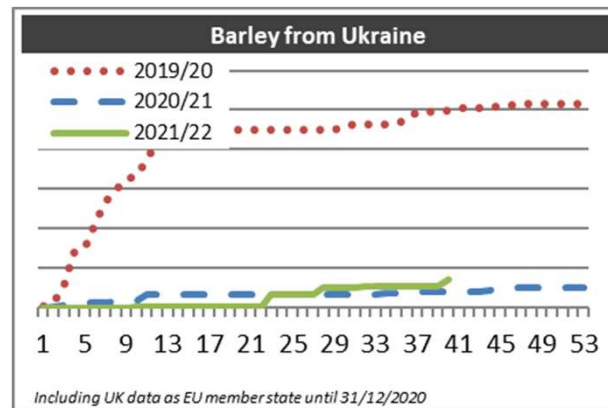
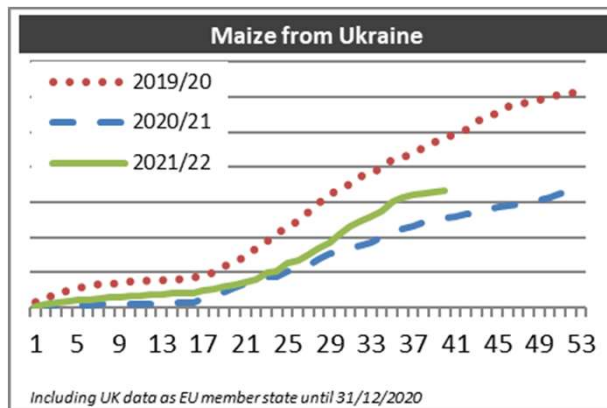
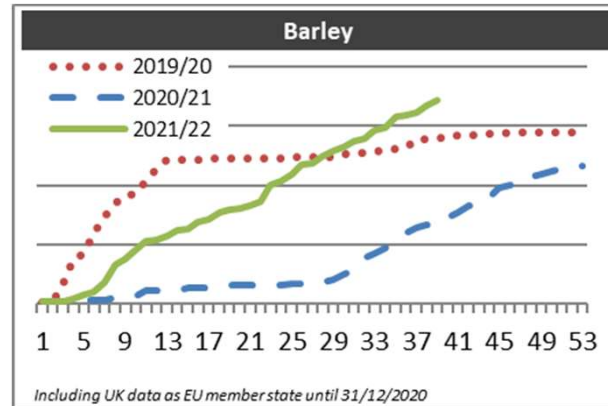
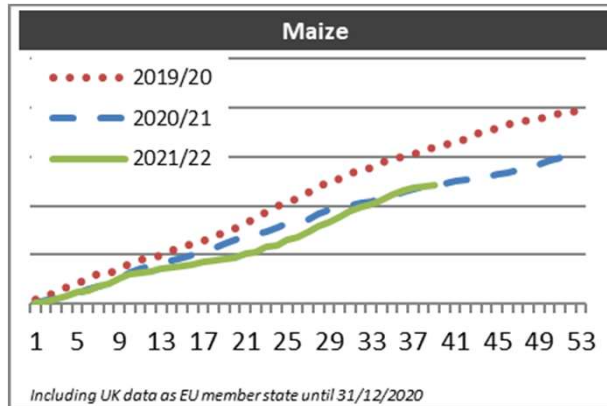
Source: TAXUD Surv. Data

Cereals – EU Exports



Source: TAXUD Surv. Data

Cereals – EU Imports



Source: TAXUD Surv. Data

Cereal : EU Cereals Supply & Demand 2022/23

(thousand metric tonnes)

LAST UPDATED: 01/04/2022

	2022/23 proj.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	13 226	4 094	1 474	19 973	1 209	1 068	1 318	2 093	274	44 728
Usable production	131 255	53 634	7 514	74 032	8 071	864	7 479	10 947	3 862	297 658
Area (thousand ha)	21 899	10 840	2 118	9 406	2 019	169	2 523	2 548	1 375	52 898
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	117	174	47	2	163	14 002
Total supply	145 481	58 728	11 488	103 004	9 398	2 105	8 843	13 042	4 300	356 388
Total domestic use	93 239	44 604	9 158	79 767	7 475	1 108	7 416	11 563	3 852	258 181
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
<i>of which bioethanol/biofuel</i>	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	788	322	45	444	48	5	45	66	23	1 786
Exports (to third countries)	40 000	9 625	1 042	4 363	197	15	161	5	19	55 428
Total use	133 239	54 230	10 200	84 129	7 672	1 123	7 577	11 567	3 871	313 609
Ending stocks**	12 242	4 498	1 288	18 875	1 725	982	1 266	1 474	428	42 779
Change in stocks**	-984	404	-185	-1 098	516	-86	-52	-619	154	-1 949

* Marketing year: from July to June

** At the end of the marketing year

EU spring planting – EFA derogation

Commission Implementing Decision (EU) 2022/484 of 23 March 2022 providing for derogations from Regulation (EU) No 1307/2013 of the European Parliament and of the Council and from Commission Delegated Regulation (EU) No 639/2014 as regards the implementation of certain conditions relating to the greening payment for claim year 2022

Cereals

- Owing to derogation 200 000 hectares of additional maize area
- On greater winter wheat planting, soft wheat area is forecast to increase about 220 000 hectares (no impacts from derogation)

Oilseeds

- Sunflower area is expected to increase by 200 000 hectares
- Soya area is expected to increase by 20 000 hectares

Oilseeds

OILSEEDS SUPPLY & DEMAND

(thousand metric tonnes)

<i>last updated: 01/04/2022</i>	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	2 681	10 548	30 247	18 127	2 875	11 185	32 187
Area (thousand ha)	5 326	949	4 493	10 768	5 636	968	4 693	11 298
Yield (tonnes/ha)	3.20	2.83	2.35	2.81	3.22	2.97	2.38	2.85
Imports (from third countries)	4 900	14 500	450	19 850	4 000	15 000	318	19 318
Total supply	22 419	18 281	11 698	52 397	22 627	19 075	12 370	54 072
Domestic use	21 419	16 864	10 531	48 814	21 813	17 651	11 198	50 662
<i>of which crushing</i>	<i>(20 673)</i>	<i>(14 873)</i>	<i>(9 318)</i>	<i>(44 863)</i>	<i>(21 048)</i>	<i>(15 554)</i>	<i>(9 921)</i>	<i>(46 523)</i>
Exports (to third countries)	500	217	300	1 017	314	223	305	843
Total use	21 919	17 081	10 831	49 831	22 127	17 875	11 503	51 505
Ending stocks	500	1 200	867	2 567	500	1 200	867	2 567
Change in stocks	-	100	167	267	-	-	-	-

Sources: EC – DG AGRI

Meals

OILSEED MEALS SUPPLY & DEMAND

(thousand metric tonnes)

	2021/22 fc.				2022/23 proj.			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
<i>last updated: 01/04/2022</i>								
Beginning stocks	50	342	100	492	50	342	100	492
Usable production	11 783	11 750	5 125	28 658	11 997	12 288	5 457	29 742
Imports (from third countries)	600	16 700	2 000	19 300	502	16 701	1 000	18 203
Total supply	12 433	28 792	7 225	48 450	12 549	29 330	6 557	48 436
Domestic use	11 759	27 687	6 625	46 071	11 908	28 233	5 896	46 038
Exports (to third countries)	624	763	500	1 888	591	755	560	1 906
Total use	12 383	28 450	7 125	47 958	12 499	28 988	6 457	47 944
Ending stocks	50	342	100	492	50	342	100	492
Change in stocks	-	-1	-	-1	-	1	-	1

Sources : EC – DG AGRI

Oils

VEGETABLE OILS SUPPLY & DEMAND

(thousand metric tonnes)

<i>last updated: 01/04/2022</i>	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	3 914	0	15 364	8 629	3 111	4 167	0	15 907
Imports (from third countries)	500	446	1 500	5 400	7 846	425	250	836	4 590	6 101
Total supply	9 567	3 595	5 684	5 889	24 735	9 646	3 536	5 274	5 078	23 533
Domestic use	8 576	2 570	4 963	5 201	21 311	8 690	2 561	4 703	4 374	20 328
Exports (to third countries)	400	850	450	200	1 900	365	800	300	215	1 680
Total use	8 976	3 420	5 413	5 401	23 211	9 054	3 361	5 004	4 589	22 008
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

Oilseeds – EU Trade

Cumul of week 1 to 39

(tonnes)	EU*		EU + UK		EU + UK	
	01/07/2021 - 27/03/2022		01/07/2020 - 28/03/2021		01/07/2019 - 29/03/2020	
	Export	Import	Export	Import	Export	Import
Soyabeans	232 718	10 151 218	155 802	11 038 055	194 039	10 609 179
Rapeseed	402 789	3 904 205	83 082	5 126 993	16 951	4 928 847
Sunflowerseed	219 268	392 162	477 603	746 185	309 322	835 176
Total seeds	854 775	14 447 586	716 486	16 911 233	520 313	16 373 203
Soyameal	649 397	12 095 343	422 087	12 767 402	358 900	13 305 472
Rapeseed meal	558 963	426 315	443 619	310 256	340 356	263 237
Sunflowerseed meal	451 796	1 706 232	381 507	2 037 970	373 000	2 275 592
Total meals	1 660 157	14 227 890	1 247 214	15 115 628	1 072 256	15 844 301
Soyaoil	743 589	402 588	589 213	370 198	441 439	363 207
Rapeseed oil	219 867	454 395	419 465	193 732	131 017	243 632
Sunflowerseed oil	426 756	1 459 040	421 078	1 360 741	395 077	1 710 733
Palm oil	135 253	3 722 718	75 268	4 094 277	91 735	4 300 145
Total oils	1 525 465	6 038 742	1 505 024	6 018 949	1 059 268	6 617 717
General Total	4 040 397	34 714 217	3 468 724	38 045 810	2 651 838	38 835 221

* The United Kingdom is no longer a Member State of the European Union, however until the end of the transition period it was still a part of the EU Customs Union. Due to the absence of intra-trade data in the surveillance system, the totals of the EU trade data therefore also include the UK data until 31/12/2020. The data as of 1/1/2021 is therefore not comparable with the data until 31/12/2020.

Oilseeds – EU Trade

Top 5 import origins* - Marketing Year 2021/22 (update of 27/02/2022)

Soyabeans			Rapeseed			Sunflowerseed		
Origin	tonnes	share	Origin	tonnes	share	Origin	tonnes	share
Brazil	3 719 308	42.7%	Ukraine	1 612 674	49.9%	Moldova	191 391	61.0%
United States of America	3 522 337	40.4%	Australia	865 591	26.8%	Turkey	26 505	8.4%
Canada	1 071 217	12.3%	Canada	501 757	15.5%	China	24 572	7.8%
Ukraine	299 569	3.4%	Moldova	79 012	2.4%	Serbia	18 634	5.9%
Togo	22 554	0.3%	Serbia	59 285	1.8%	Ukraine	16 656	5.3%

Top 5 import origins* - Marketing Year 2021/22 (update of 27/03/2022)

Soyabeans			Rapeseed			Sunflowerseed		
Origin	tonnes	share	Origin	tonnes	share	Origin	tonnes	share
Brazil	4 787 566	47.2%	Ukraine	1 620 212	41.5%	Moldova	257 204	65.6%
United States of America	3 808 648	37.5%	Australia	1 474 346	37.8%	Turkey	28 682	7.3%
Canada	1 098 290	10.8%	Canada	538 057	13.8%	China	27 842	7.1%
Ukraine	328 010	3.2%	Moldova	79 868	2.0%	Serbia	19 533	5.0%
Togo	40 247	0.4%	Serbia	67 810	1.7%	Ukraine	19 255	4.9%

Soyameal			Rapeseed meal			Sunflowerseed meal		
Origin	tonnes	share	Origin	tonnes	share	Origin	tonnes	share
Brazil	4 788 997	45.2%	Russia	141 695	36.3%	Ukraine	538 020	39.2%
Argentina	4 300 641	40.6%	Ukraine	137 491	35.3%	Russia	468 416	34.1%
Paraguay	422 957	4.0%	United Kingdom	66 964	17.2%	Argentina	321 029	23.4%
United States of America	314 419	3.0%	Belarus	36 021	9.2%	Serbia	33 870	2.5%
India	195 748	1.8%				Bosnia and Herzegovina	9 880	0.7%

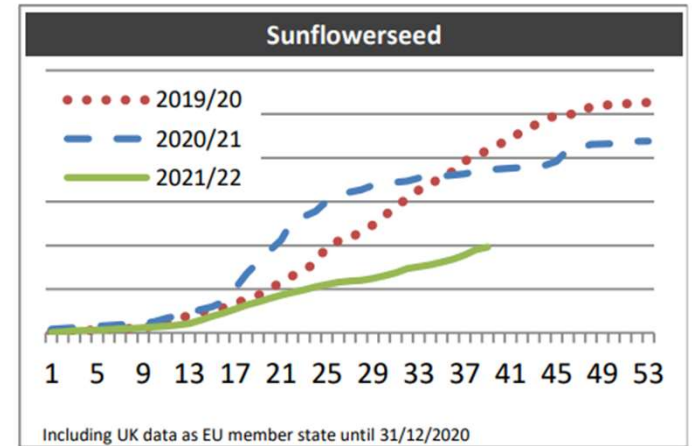
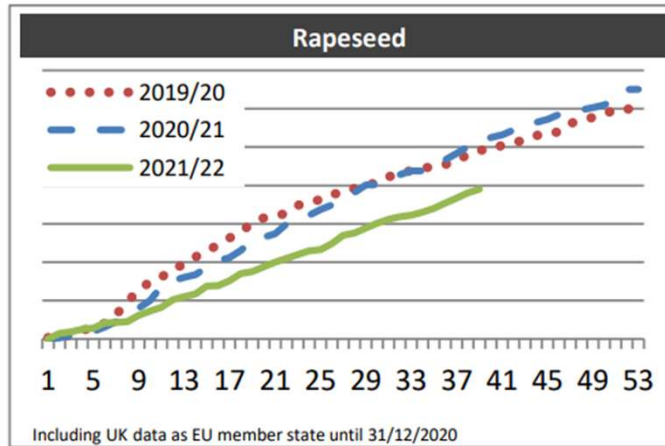
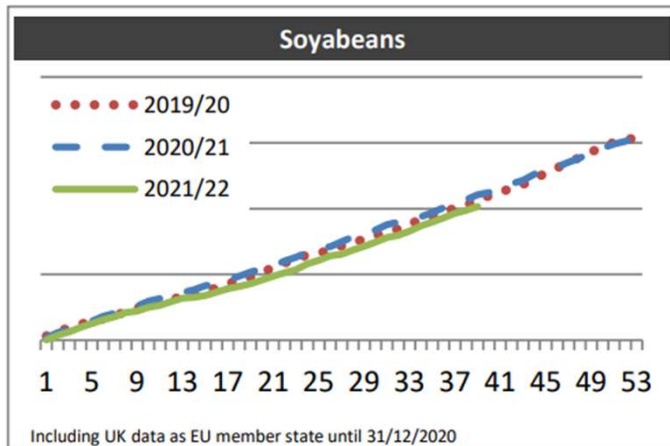
Soyameal			Rapeseed meal			Sunflowerseed meal		
Origin	tonnes	share	Origin	tonnes	share	Origin	tonnes	share
Brazil	5 456 201	45.1%	Russia	166 381	39.0%	Russia	637 750	37.4%
Argentina	4 897 841	40.5%	Ukraine	138 757	32.5%	Ukraine	633 012	37.1%
Paraguay	478 322	4.0%	United Kingdom	70 472	16.5%	Argentina	361 812	21.2%
United States of America	318 702	2.6%	Belarus	42 441	10.0%	Belarus	50 714	3.0%
India	244 888	2.0%				Bosnia and Herzegovina	13 058	0.8%

Sunflowerseed oil			Rapeseed oil			Soya oil		
Origin	tonnes	share	Origin	tonnes	share	Origin	tonnes	share
Ukraine	1 117 185	85.9%	Ukraine	125 629	31.1%	Ukraine	129 502	35.1%
Moldova	60 444	6.5%	Russia	101 234	25.0%	Argentina	109 164	29.5%
Serbia	60 444	4.7%	Belarus	76 602	18.9%	Norway	46 702	12.6%
Bosnia and Herzegovina	9 278	0.7%	United Kingdom	47 692	11.8%	Serbia	32 098	8.7%
United Kingdom	9 128	0.7%	United Arab Emirates	30 750	7.6%	Russia	23 524	6.4%

Sunflowerseed oil			Rapeseed oil			Soya oil		
Origin	tonnes	share	Origin	tonnes	share	Origin	tonnes	share
Ukraine	1 244 986	85.3%	Ukraine	125 858	27.7%	Ukraine	141 900	35.2%
Moldova	95 970	6.6%	Russia	123 603	27.2%	Argentina	109 164	27.1%
Serbia	70 183	4.8%	Belarus	86 404	19.0%	Norway	53 435	13.3%
Bosnia and Herzegovina	11 525	0.8%	United Kingdom	51 568	11.3%	Serbia	38 683	9.6%
United Kingdom	10 620	0.7%	United Arab Emirates	41 127	9.1%	Russia	27 056	6.7%

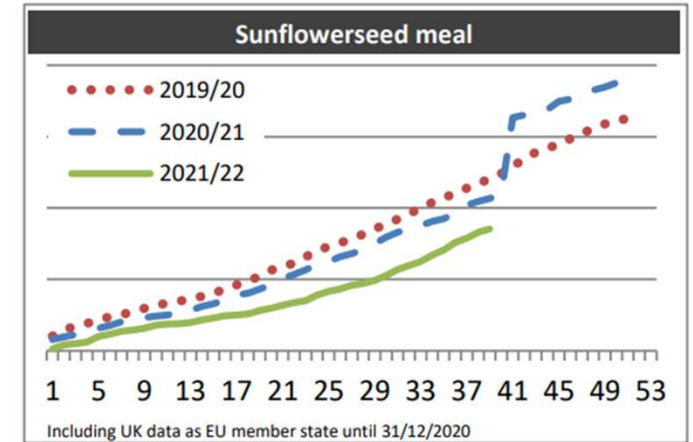
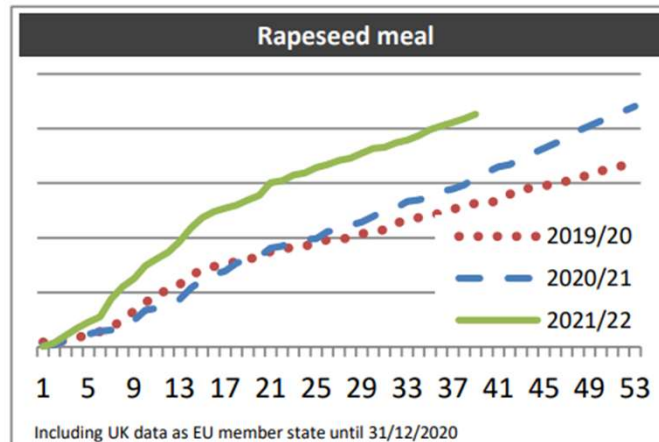
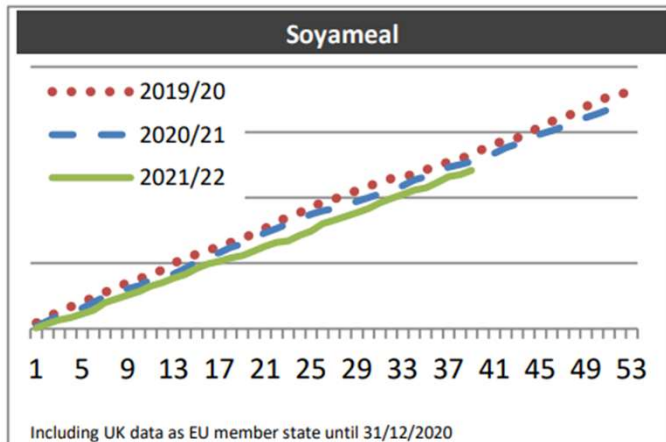
Source: TAXUD Surv. Data

Oilseeds – EU Imports



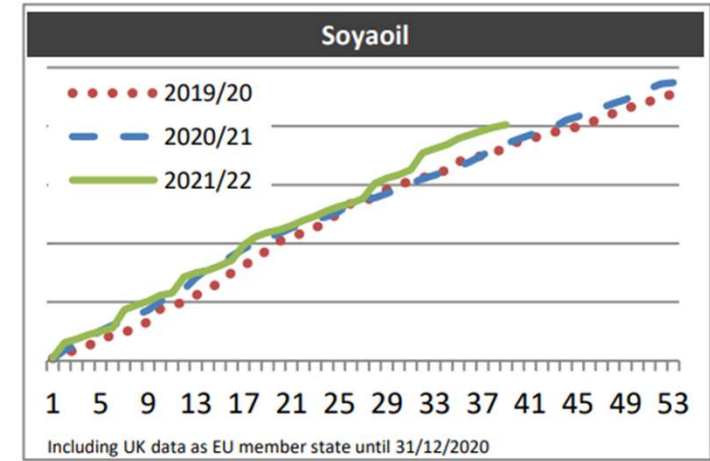
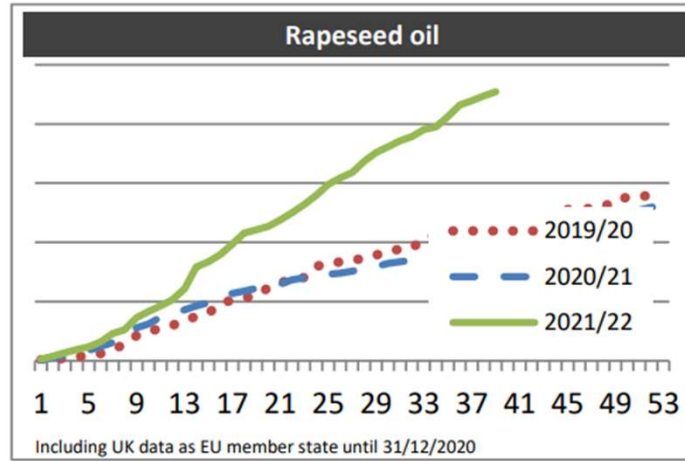
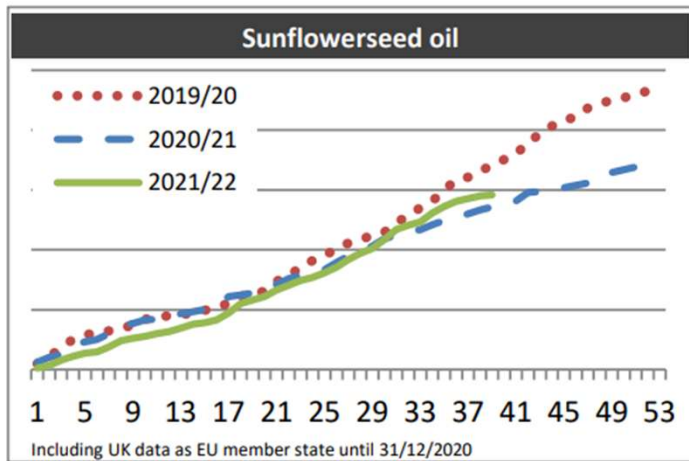
Source: TAXUD Surv. Data

Meals – EU Imports



Source: TAXUD Surv. Data

Oil – EU Imports



Source: TAXUD Surv. Data

Sunflower seed global market

Sunflowerseed: Harvested area

	19/20	20/21	21/22	22/23	y/y
		(est.)	(f'cast)	(proj.)	change
Europe	4.6	4.7	4.7	5.0	+ 4.9%
EU ^{a)}	4.3	4.4	4.5	4.7	+ 5.1%
CIS	16.0	15.9	17.6	15.4	- 12.4%
Russia	8.4	8.3	9.6	9.6	-
Ukraine	6.4	6.5	6.7	4.5	- 32.4%
N & C America	0.5	0.7	0.5	0.6	+ 0.5%
USA	0.5	0.7	0.5	0.5	+ 0.4%
South America	1.8	1.9	2.0	2.0	- 2.2%
Argentina	1.5	1.7	1.8	1.7	- 2.9%
Near East Asa	0.8	0.8	0.8	0.8	+ 2.0%
Far East Asia	1.9	1.9	2.1	2.0	- 3.6%
China	0.9	0.9	1.1	1.1	- 4.5%
India	0.2	0.2	0.3	0.3	-
Africa	0.5	0.5	0.6	0.6	+ 3.4%
WORLD TOTAL	26.1	26.4	28.4	26.4	- 7.2%

^{a)} EU-28 to 19/20, EU-27 from 20/21.

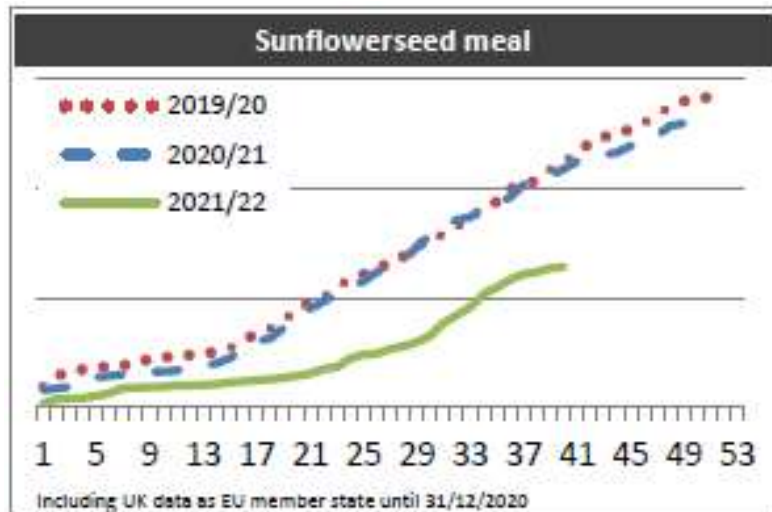
Source: IGC

Sunflowerseed: Progress of exporters (October-February)

000t	18/19	19/20	20/21	21/22 *	y/y
					change
Argentina	23	46	15	24	+ 54.4%
China	225	225	265	199	- 24.7%
EU **	207	148	308	274	- 11.1%
Kazakhstan	218	233	194	66	- 65.7%
Moldova	358	211	229	275	+ 20.1%
Russia	63	757	506	112	- 77.8%
Serbia	58	26	33	41	+ 23.8%
Ukraine	55	21	173	45	- 74.1%
USA	45	31	40	41	+ 2.9%
Sub-total	1,254	1,698	1,762	1,077	- 38.9%

* Based on customs data and IGC estimates, ** EU-28 to 19/20, EU-27 from 20/21

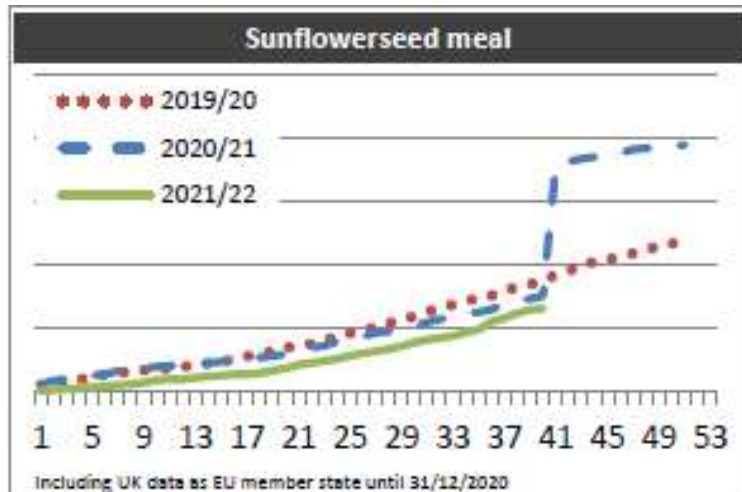
Oilseeds – EU sunflower seed meal imports from UA



week	2019/20	2020/21	2021/22
36	906 190	897 033	583 274
37	937 124	923 020	607 619
38	996 078	957 778	616 006
39	1 006 332	1 014 672	635 314
40	1 035 769	1 038 680	639 692

Source: TAXUD Surv. Data

Oilseeds – EU sunflower seed meal imports from Russia



week	2019/20	2020/21	2021/22
36	716 126	619 347	556 045
37	740 581	628 876	581 591
38	761 282	653 713	623 933
39	800 756	691 431	648 007
40	822 295	721 853	658 405

Source: TAXUD Surv. Data

Logistics in the EU

POLAND

- Cooperating with UA authorities on how to boost handling capacity.
- There is a possibility of using broad gauge line (goes all the way to Slawkow (in Silesia region)).
- Polish see ports are having spare capacity (heavy investment last years in infrastructures).
- Polish see ports concerned: Gdansk, Gdynia, Szczecin, Swinoujscie

ROMANIA

- Liberalisation of transit and bilateral transport for the next three months.
- Improving infrastructure both for passengers and cargo.
- More than 100 freight wagons out of the approximately 700 that block the train lines in the Port of Constanta have already been moved.

Logistics

Ukraine

- **Black Sea** ports are closed, damages to port infrastructure likely but hard to assess at this stage
- Some damages to storage facilities at ports and inland were reported

Russia

- **Azov sea and Black sea** Russia ports operational
- Shipments from Russia continue

Ukraine spring planting

21 region of Ukraine have already started sowing spring crops, and 15 regions started sowing on the same date last year.

Total planted area by April 1, 2022 :

- spring wheat: 81.0 th ha,
- spring barley: 327.3 th ha,
- spring rapeseed: 7.6 th ha,
- oats: 50.1 th ha,
- peas: 62.3 th ha,
- sugar beets: 30.6 th ha,
- sunflower: 33.7 th ha,
- soybeans: 10.4 th ha.

Ukraine. Planting progress, April 1, 2022

Crop	Planned area, Th ha	Planted, Th ha		%
		2022	2021	
Spring wheat	157.4	81.0	13.5	51.4
Spring barley	1036.5	327.3	226.1	21.8
Oats	134.0	50.1	5.7	37.3
Peas	172.2	62.3	65.1	36.1
Spring rapeseed	23.9	7.6	-	31.8
Sunflower	4811.0	33.7	-	0.7
Soybeans	1041.4	10.4	-	1.0

Winter crops for grain area for the harvest of 2022 amounts to 7.7 M ha, incl.

- 6.5 M ha of winter wheat and triticale;
- 159 K ha of rye;
- 1 M ha of barley.

Source: UkrAgroConsult

Thank you



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