Crops Market Observatory

European Commission

Last update : 20.07.2017

Kick-off meeting summary

20 July 2017

- The kick-off meeting of the Crops Market Observatory (CMO) took place on 20 July 2017, chaired by Mr. Jens Schaps, Director for Agricultural Markets. It gathered representatives of 14 organisations from all stages of the cereals, oilseeds and protein crops supply chain: producers organisations (CEJA-European Council of Young Farmers, COPA-Committee of Professional Agricultural Organisations, COGECA-General Confederation of Agricultural Cooperatives, ECVC - European Coordination Via Campesina), traders organisations (COCERAL - European Organisation for trade in agricultural commodities, EPKK – Estonian Chamber of Agriculture & Commerce), processing industry organisations (European Flour Millers – flour industry, Semouliers – semolina industry, Fediol – vegetable oil industry, Starch Europe – starch industry, FEFAC – compound feed industry, CAOBISCO – confectionery industry, ePURE - ethanol industry, CEFIC – chemical fermentation industry).
- Commissioner Hogan opened the meeting and highlighted the role of the CMO as a discussion platform to assess the crops market situation, based on the positive experience of the Milk and Meat Market Observatories and following the recommendations on market transparency of the Agricultural Markets Task Force. He also underlined the importance of the crops sector to supply both the EU domestic feed and food markets, as well as its essential role in the competitiveness of EU agricultural products on the global export markets.
- Ms Silke Boger, Head of Unit, informed the participants about the structure and functioning of the CMO, the rules of procedures and its main objectives, being the assessment of the crops market situation by its Economic Board and the dissemination of market information through a dedicated webpage. Participants also commented on the need to maintain a regular flow of information exchange in between two meetings of the Observatory Board. The group subsequently adopted the Rules of Procedures.
- Next discussions covered the data sources as well as the contents of the CMO webpage that was launched during the meeting. Participants warmly welcomed the new webpage, in particular for making detailed market information available in a user-friendly format. Participants also agreed to supply the Crops Market Observatory with further information in order to overcome some existing data gaps, in particular on consumption (food, feed and industrial uses). Relevance of getting a better insight into market demands for different crops qualities was also highlighted.
- Finally, the Economic Board had a first lively and constructive exchange of views on the current cereals and oilseeds market developments and the outlook for the coming marketing year on the basis of presentations by Commission's Services. On the cereals market, the satisfactory quality of this year harvest should allow in particular EU wheat exports to recover. However domestic cereals prices, even if slightly recovering are still low. On the oilseeds market, production should recover significantly from last year and domestic market demand is expected to sustain domestic prices for oilseeds. Importance of the EU supply and demand situation for plant proteins was highlighted. Participants also identified specific topics to be further discussed, like the medium-term outlook for crops, a better understanding of the market demand for EU grown protein crops and weather impact monitoring.
- Further to this kick-off meeting, the first regular meeting of the CMO economic board will be held in December 2017.

ANNEX 1

Structure and Functioning of the Crops MO

Structure and Functioning of the Crops Market Observatory

Kick-off meeting 20 July 2017

Silke Boger

Head of Unit G.4

Two main elements

- *An Economic Board composed by representatives of stakeholder organisations in the supply chain in the cereals, oilseeds and protein crops markets*
- *A dedicated website, updated regularly and including all market data to be disseminated*

The website contains

...data on production, prices, trade flows for the EU and, where possible, for the main exporting and importing regions of the world

...the reports and presentations of the Market Observatory

...files containing market information that will be updated on a regular basis

The Economic Board, the market experts

...contribute to and share understanding of market developments and their grounds, while avoiding political posturing

...help assess elements, like internal consumption, for which market transparency is limited

... contribute to a good understanding of international markets, in particular trade flows and stock information at world level

European Commission

Crops Market Observatory

Union des Ass. des Semouliers de l'UE

COGECA

ePURE

COCERAL

FEDIOL

CEJA

FEFAC

CEFIC

COPA

CAOBISCO

Starch Europe

Via Campesina

Estonian Chamber of Agriculture & Commerce

European Flour Millers

Agriculture and Rural Development

Rules of Procedures (1/3)

- *Meetings chaired by representative of DG AGRI, in principle Mr Jens Schaps, Director "Markets and Observatories"*
- *Experts represent Member Organisation, replacement is possible if the alternate expert fulfils the required criteria*

Rules of Procedures (2/3)

- *Chair convenes meetings, two regular meetings per year unless a particular market situation requires more frequent meetings*
- *Invitation and agenda sent not later than 14 calendar days before meeting, unless in urgent or exceptional cases*
- *Opinion adopted by consensus in principle*

Rules of Procedures (3/3)

- *Possibility to set up sub-groups*
- *Ad-hoc invitation of experts with specific expertise*
- *Observers (Organisations and Individuals) can be invited. Observers have no voting rights and shall not participate in the formulation of recommendations*
- *Transparency: publication of member organisations (and their experts unless specific cases of derogation), all relevant documents are published*

RULES OF PROCEDURE OF THE EXPERT GROUP "CROPS MARKET OBSERVATORY"

THE GROUP Crops Market Observatory,

Having regard to the creation of the group by Directorate General for Agriculture and Rural Development,

Having regard to the standard rules of procedure of expert groups[1],

HAS ADOPTED THE FOLLOWING RULES OF PROCEDURE:

Point 1
Operation of the group

The group shall act at the request of the Directorate General for Agriculture and Rural Development (hereafter DG AGRI).

The group shall be chaired by a representative of DG AGRI.

Point 2
Member's representatives

Members shall be represented by the expert/s identified within the selection procedure following the call for application.

In principle the representative of the member cannot be replaced. However, if a member cannot be represented in a specific meeting by any nominated representative, the member can nominate a substitute for that meeting by notifying DG AGRI ten days before the meeting, provided that the substitute meets the selection criteria specified in chapter 4 of the call for application.

In case of replacement of a representative on a permanent basis, the member shall notify the Commission and provide all the information enabling the Commission to assess the eligibility of the new representative against the selection criteria specified in chapter 4 of the call for application.

[1] C(2016) 3301 (Annex 3) -

http://ec.europa.eu/transparency/regexpert/PDF/C_2016_3301_F1_ANNEX_EN.pdf

DG AGRI may refuse the nomination of the substitute/replacement if it considers this nomination inappropriate in light of the requirements of the call.

Point 3

Convening a meeting

1. Meetings of the group are convened by the Chair with the agreement of DG AGRI either on its own initiative or at the request of a simple majority of members after DG AGRI has given its agreement.

2. Joint meetings of the group with other groups may be convened to discuss matters falling within their respective areas of responsibility.

3. Meetings of the group shall be held on Commission premises.

Point 4

Agenda

1. The secretariat shall draw up the agenda under the responsibility of the Chair and send it to the members of the group.

2. The agenda shall be adopted by the group at the start of the meeting.

Point 5

Documentation to be sent to group members

The secretariat shall send the invitation to the meeting and the draft agenda to the group members no later than fourteen calendar days before the date of the meeting.

The secretariat shall send documents on which the group is consulted to the group members no later than fourteen calendar days before the date of the meeting.

In urgent or exceptional cases, the time limits for sending the documentation mentioned in 1 and 2 may be reduced to five calendar days before the date of the meeting.

Point 6

Opinions of the group

1. As far as possible, the group shall adopt its opinions, recommendations or reports by consensus.

2. In the event of a vote, the outcome of the vote shall be decided by simple majority of the members. The members that have voted against or abstained shall have the right to have a document summarising the reasons for their position annexed to the opinions, recommendations or reports.

Point 7

Sub-groups

1. DG AGRI may set up sub-groups for the purpose of examining specific questions on the basis of terms of reference defined by DG AGRI. Sub-groups shall operate in compliance with the Commission's horizontal rules on expert groups ('the horizontal rules') and shall report to the group. They shall be dissolved as soon as their mandate is fulfilled.

2. The members of sub-groups that are not members of the group shall be selected via a public call for applications, in compliance with the horizontal rules.

Point 8

Invited experts

DG AGRI may invite experts with specific expertise with respect to a subject matter on the agenda to take part in the work of the group or sub-group on an ad hoc basis.

Point 9

Observers

Individuals and organisations may be granted an observer status, in compliance with the horizontal rules, by direct invitation.

Organisations appointed as observers shall nominate their representatives.

Observers and their representatives shall not have voting rights and shall not participate in the formulation of recommendations or advice of the group.

Point 10

Written procedure

If necessary, the group's opinion or recommendation on a specific question may be delivered via a written procedure. To this end, the Secretariat sends the group members the document(s) on which the group is being consulted.

However, if a simple majority of group members asks for the question to be examined at a meeting of the group, the written procedure shall be terminated without result and the Chair shall convene a meeting of the group as soon as possible.

Point 11

Secretariat

DG AGRI shall provide secretarial support for the group and its sub-groups.

Point 12

Minutes of the meetings

Minutes on the discussion on each point on the agenda and the opinions delivered by the group shall be meaningful and complete. Minutes shall be drafted by the secretariat under the responsibility of the Chair.

Point 13

Attendance list

At each meeting, the secretariat shall draw up, under the responsibility of the Chair, an attendance list specifying, where appropriate, the organisations to which the participants belong.

Point 14

Correspondence

1. Correspondence relating to the group shall be addressed to DG AGRI, for the attention of the Chair.

2. Correspondence for group members shall be sent to the e-mail address which they provide for that purpose.

Point 15

Transparency

1. The group and the sub-groups shall be registered on the Register of expert groups.

2. As concerns the group composition, the following data shall be published on the Register of expert groups:

    a) the name of member organisations; the interest represented shall be disclosed;

    b) the name of observers.

3. DG AGRI shall make available all relevant documents, including the agendas, the minutes and the participants' submissions, either on the Register of expert groups or via a link from the Register to a dedicated website, where this information can be found. Access to dedicated websites shall not be submitted to user registration or any other restriction. In particular, DG AGRI shall publish the agenda and other relevant background documents in due time ahead of the meeting, followed by timely publication of minutes. Exceptions to publication shall only be foreseen where it is deemed that disclosure of a document would undermine the protection of a public or private interest as defined in Article 4 of Regulation (EC) N° 1049/2001.

Point 16

Access to documents

Applications for access to documents held by the expert group will be handled in accordance with Regulation (EC) No 1049/2001[2].

Point 17

Deliberations

In agreement with DG AGRI, the group may, by a simple majority of its members, decide that deliberations shall be public.

[2] Regulation (EC) No 1049/2001 of the European Parliament and of the Council of 30 May 2001 regarding public access to European Parliament, Council and Commission documents (OJ L 145, 31.5.2001, p. 43).

ANNEX 2

Data Sources on Crops Markets

EUROPEAN CROPS MARKET OBSERVATORY 20 July 2017

Data Sources

Agriculture and Rural Development

European Commission

Crops Market Observatory

CONTENT

- Statistics - **PRODUCTION**
- Statistics - **TRADE**
- Statistics – **PRICES**
- **Balance sheets**
- **Market situation presentations**
- **OUTLOOK** (short and medium term)
- **REPORTS**

Agriculture and Rural Development

European Commission

Crops Market Observatory

Statistics - **PRODUCTION**

EU production

Cereals & Oilseeds

Source : Eurostat

If data not available (i.e. current MY):
calculation by DG AGRI based on Eurostat data (area) and JRC yield forecast or other yield estimates

Frequency : Monthly

Statistics - **TRADE**

EU Trade

- **Cereals, oilseeds and proteins crops extra-trade**
  - Source: Eurostat
  - Frequency: monthly
  - When: 6 weeks after end of month
- **Cereals and oilseeds extra-trade**
  - Source: DG TAXUD
  - Frequency: weeky
- **Cereals quota use**
  - Source: DG AGRI
  - Frequency: weekly
- **Cereals import duty**
  - Source : DG AGRI
  - Frequency : twice -monthly

Statistics – **PRICES**

- **Prices**
  - **EU**
    - **Cereals prices** — Source : MS; Frequency : Weekly
  - **World**
    - **World cereals prices** — Source : IGC – FranceAgriMer; Frequency : Weekly
    - **World oilseeds prices** — Source : IGC; Frequency : Weekly

Balance sheets

EU BS

- **Cereals** — Sources: European Commission; Frequency: monthly
- **Oilseeds** — Source: European Commission; Frequency: monthly
- **Proteins** — Source: European Commission and stakeholders; Frequency: twice-year

Market situation presentations

Market presentations

- **Cereals** — Source: DG AGRI; Frequency: monthly
- **Oilseeds and proteins crops** — Source: DG AGRI; Frequency: monthly

OUTLOOK (short and medium term)

- **Outlook**
  - **Short term outlook**
    - **Source** : DG AGRI
    - **Frequency** : 3 times/year
  - **Medium term outlook**
    - **Source** : DG AGRI
    - **Frequency** : Annual

REPORTS

Reports

- **Economic Board meetings**
  - **Source** : CROPS MO Economic Board
  - **Frequency** : 2 times/year
- **Other**
  - **Frequency** : when appropriate
  - (e.g. Commodity price dashboard - monthly

European Commission

Link to EU Market Observatories webpage

https://ec.europa.eu/agriculture/market-observatory

ANNEX 3

Cereals Market

European Commission

Cereals Market

CROPS Market Observatory
20th July 2017

Agriculture and Rural Development

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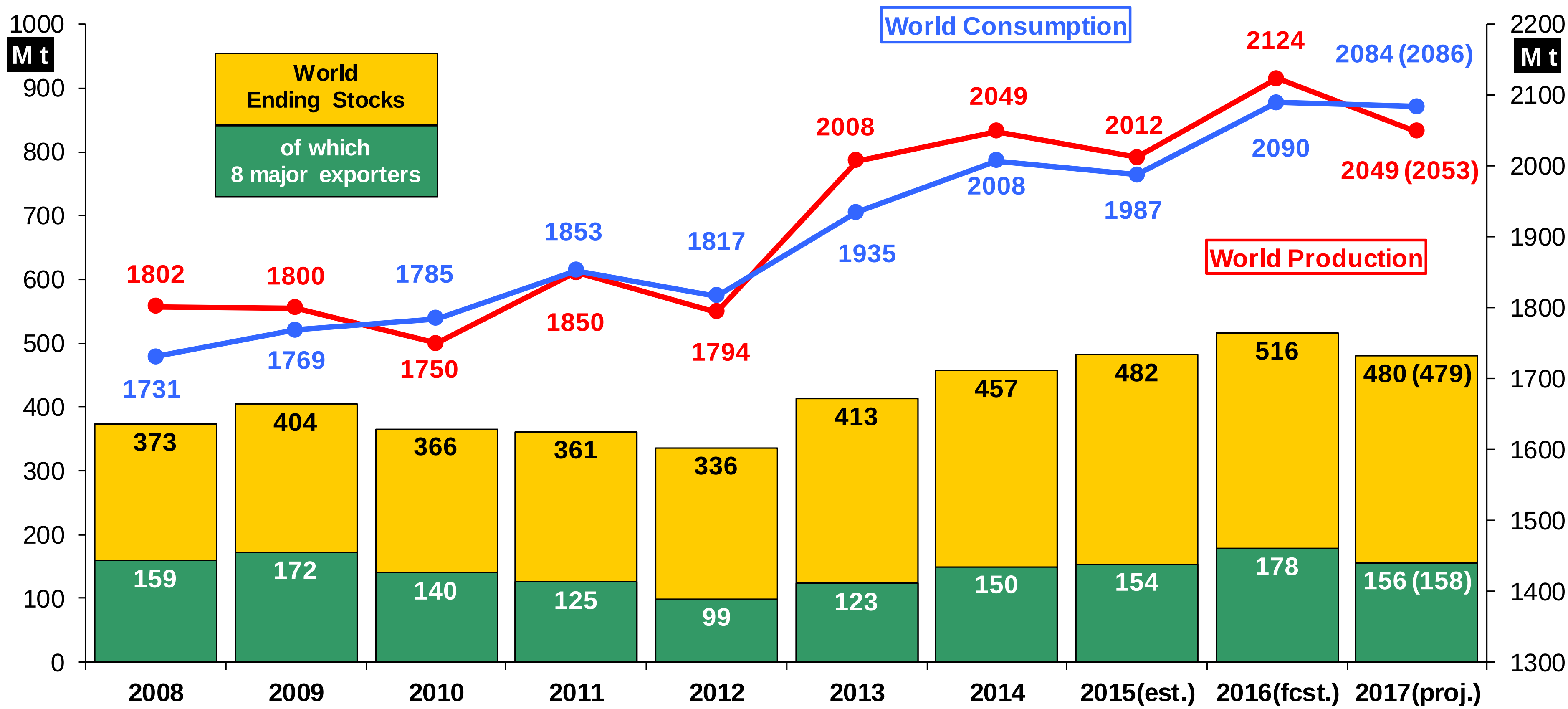
- Global context

- Present EU market situation and short-term outlook
  - Production
  - Consumption
  - Trade
  - Prices

Global Cereals Market: ample availabilities after record supply and demand in 2016/17



Source: IGC June report

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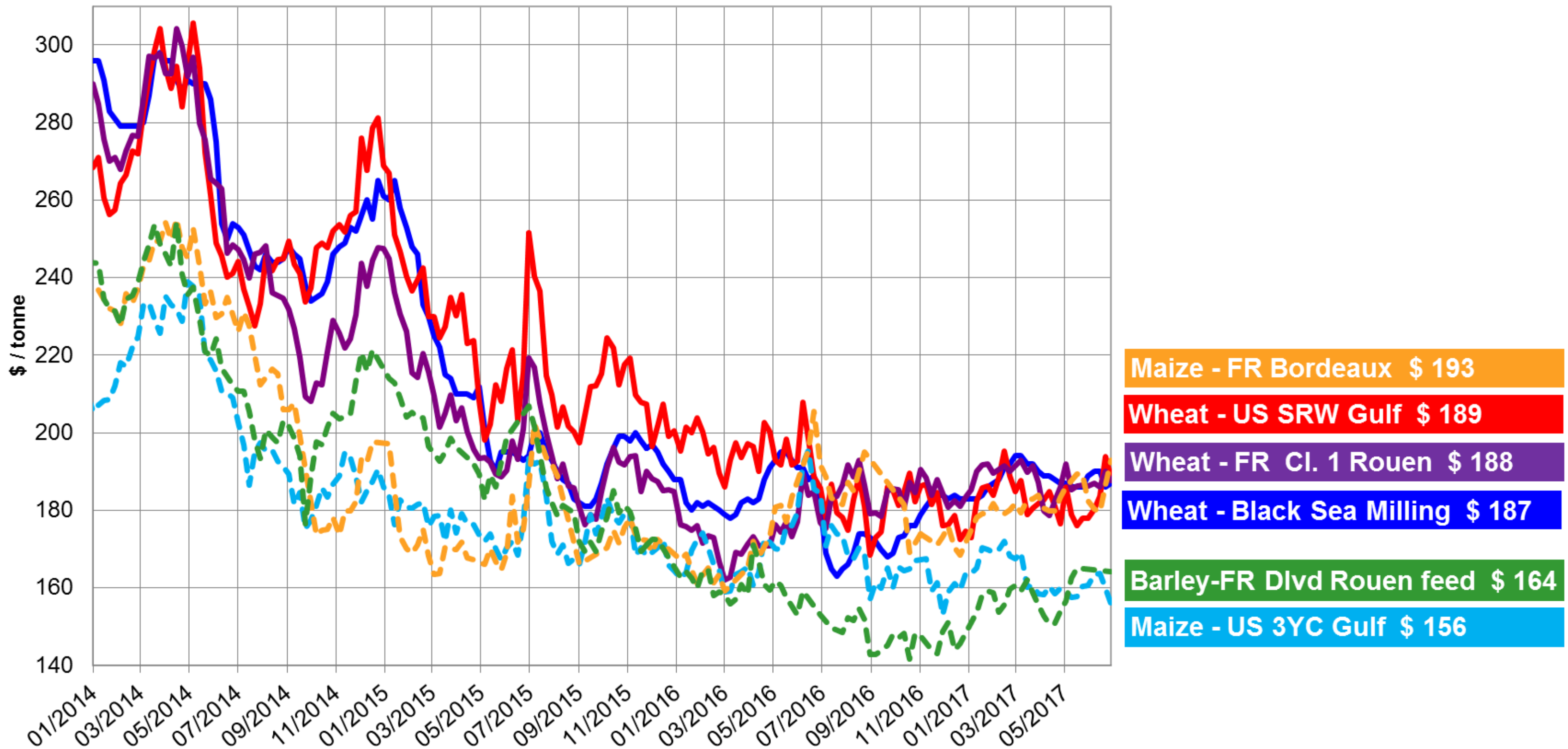
Global Cereal prices: down since 3 years



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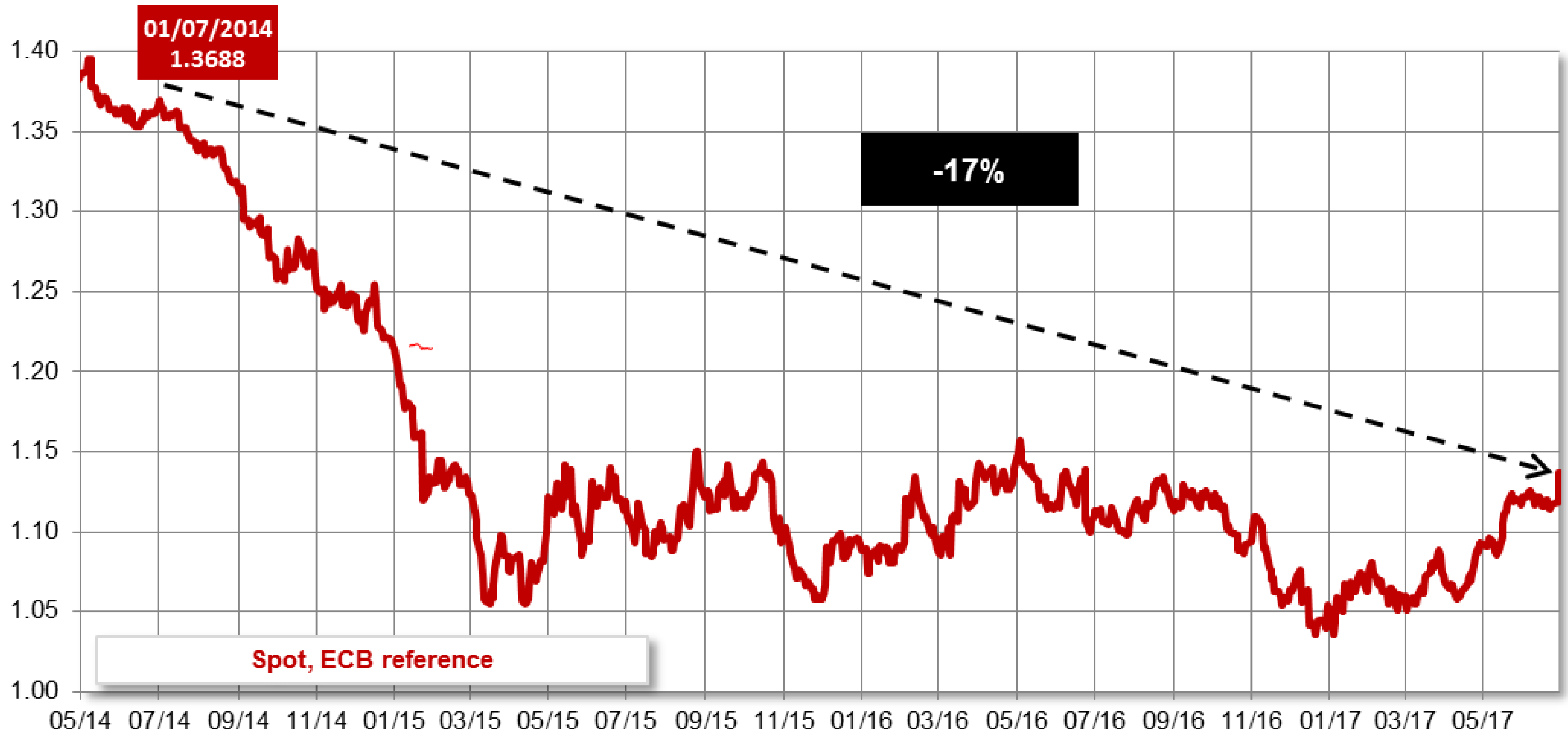
Exchange rate € vs $: a competitive € since 3 years



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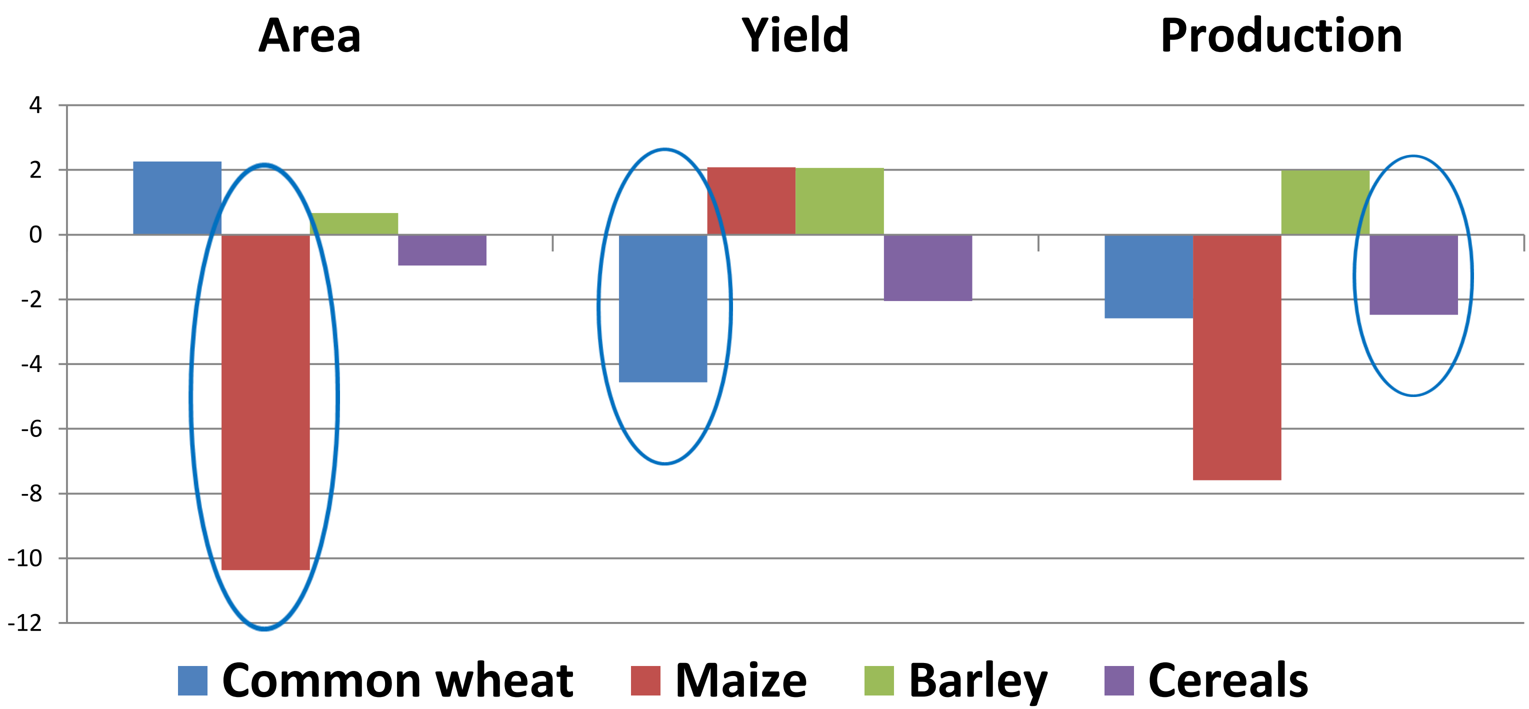
EU cereals production: 2016/17: only 295 million tonnes, less wheat (yield) and less maize (area)

Area, yield, production: 2016/17 vs 5Y-average



EU Cereals Production: 2017/18 another "mixed" year after 2016/17

EU CEREALS USABLE PRODUCTION					
Million tonnes	2014/15	2015/16	2016/17	2017/18 June fcst	%change 2016/17
TOTAL	**328.0**	**311.5**	**294.6**	**298.0**	**1.2**
Soft wheat	148.5	151.3	134.4	138.9	3.3
Durum wheat	7.6	8.3	9.2	8.8	-4.3
Barley	60.2	61.4	59.6	57.0	-4.4
Maize	77.6	59.0	60.6	62.1	2.5
Rye	8.9	7.6	7.3	7.4	1.4
Oats	7.7	7.5	8.0	8.2	2.5

EU Cereals Production: Outlook

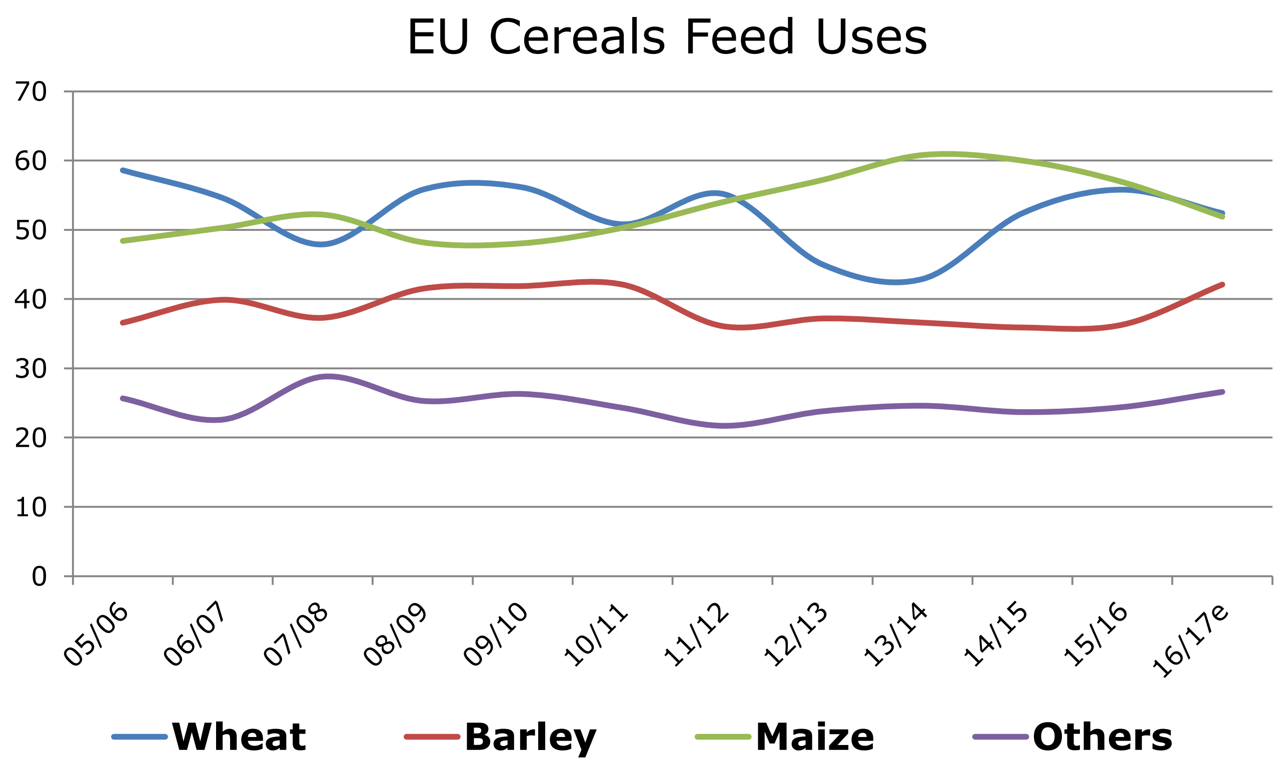
Quantity: will 300 million tonnes be the new EU norm?

Will the EU continue to produce less than 140 million tonnes of wheat and only 60 million tonnes of maize? (or can the EU produce 10% more?)

Quality: are EU cereals still present?

Can we get both the quantity and the quality? Will the EU continue to import quality wheat (soft and/or durum)?

EU cereals consumption: mainly feed ≈170-175 million tonnes, >60% of domestic uses



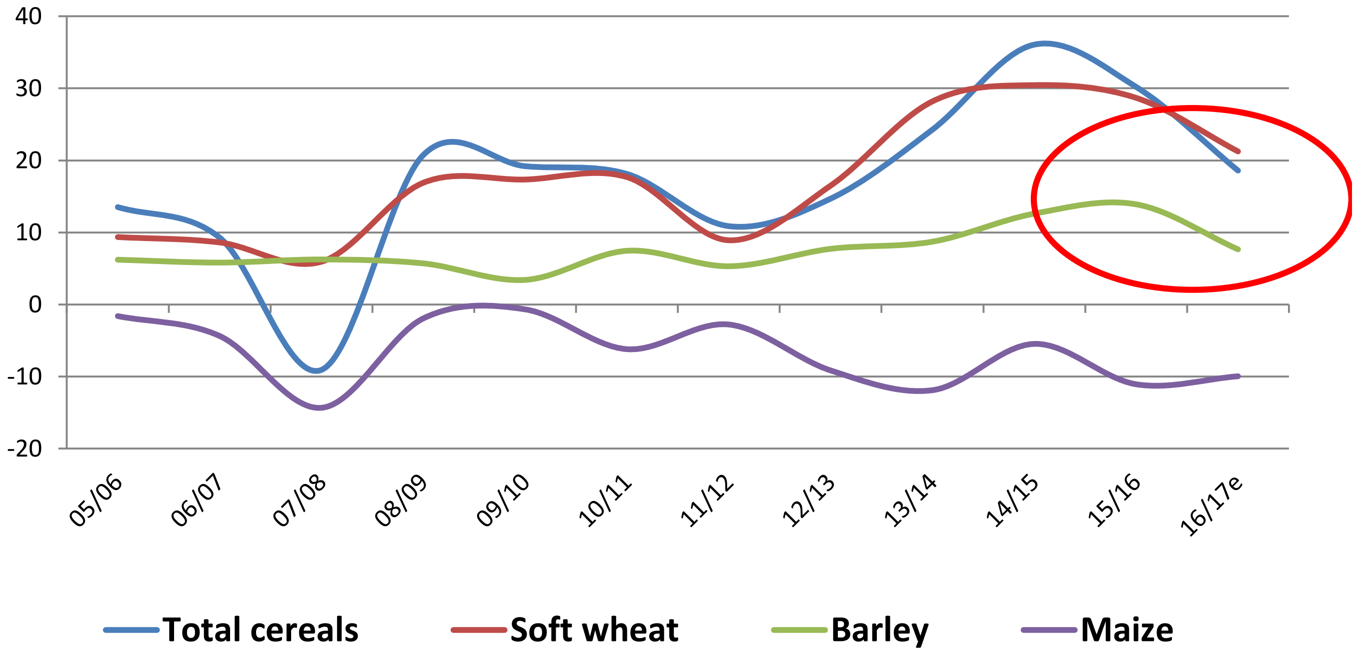
EU Cereals Consumption: outlook

Animal feed and what else?

Domestic uses: ≈ 280 million tonnes

- **Feed:** ≈ 170-175 million tonnes (>60%) - variable
- **Food:** ≈ 65 million tonnes (<25%) - stable
- **Seed:** <10 million tonnes (<5%) - stable
- **Industrial** (incl. biofuels)**:** <35 million tonnes (≈12%) – room for more?

EU net cereals trade: still positive (+ 20 million tonnes) but…



Agriculture and Rural Development

European Commission

EU Cereals Trade: Outlook

Exports: can EU wheat be again global No1?

vs strong global competition (Black Sea)?

EU soft wheat exports:

33 million tonnes in 2014/15 and 2015/16

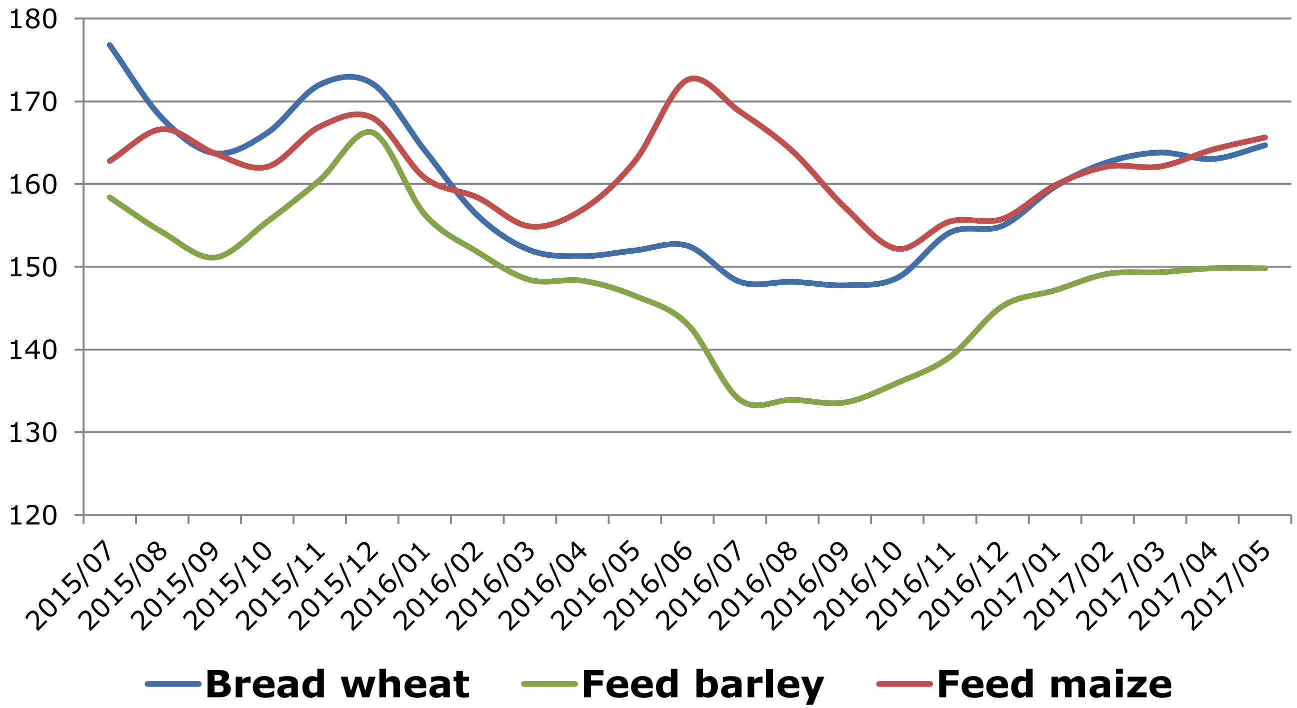
25 million tonnes in 2016/17 and 2017/18

Imports: more and more maize to come?

EU maize production down: ≈ 60 million tonnes for 3 years

EU maize imports up: ≈ 12 million tonnes for 3 years

EU cereal prices: recovering since 9 months but…



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EU Cereals Prices: Outlook

Sustainable recovery or low plateau after 2016?

*	2014	2015	2016	2017
Wheat	190 €/t	170 €/t	150 €/t	170 €/t
Maize	165 €/t	165 €/t	170 €/t	165 €/t
Barley	170 €/t	160 €/t	140 €/t	150 €/t

*** Approximate average EU prices – differences over months and locations**

EU Cereals Balance Sheet: tightening for 3 years

	EU-28 total cereals balance sheet (million tonnes)				
	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018
Beginning stocks	**31.3**	**38.0**	**48.5**	**46.5**	**38.9**
Usable production	304.8	328.0	311.6	294.6	298.0
Imports	19.2	15.6	20.6	18.2	18.1
Availabilities	**355.3**	**381.6**	**380.8**	**359.4**	**355.0**
Total domestic uses	271.6	279.2	281.3	281.5	279.9
- Human	64.8	65.0	65.1	65.4	65.7
- Seed	9.5	9.6	9.6	9.6	9.4
- Industrial	32.4	32.6	33.1	33.4	34.2
- Animal feed	164.9	172.0	173.4	173.0	170.6
Losses (excl on-farm)	2.2	2.2	2.2	2.2	2.2
Exports	43.5	51.7	50.8	36.8	37.9
Total uses	**317.3**	**333.1**	**334.3**	**320.5**	**320.0**
End stocks	**38.0**	**48.5**	**46.5**	**38.9**	**35.0**
- Market	38.0	48.5	46.5	38.9	35.0
- Intervention	0.0	0.0	0.0	0.0	0.0

European Commission

Thank you for your attention!

More information on
EU Crops Market Observatory:

https://ec.europa.eu/agriculture/market-observatory/crops_en

ANNEX 4

Oilseeds and Proteins Market

Oilseeds Market

CROPS Market Observatory
20th July 2017

Agriculture
and Rural
Development

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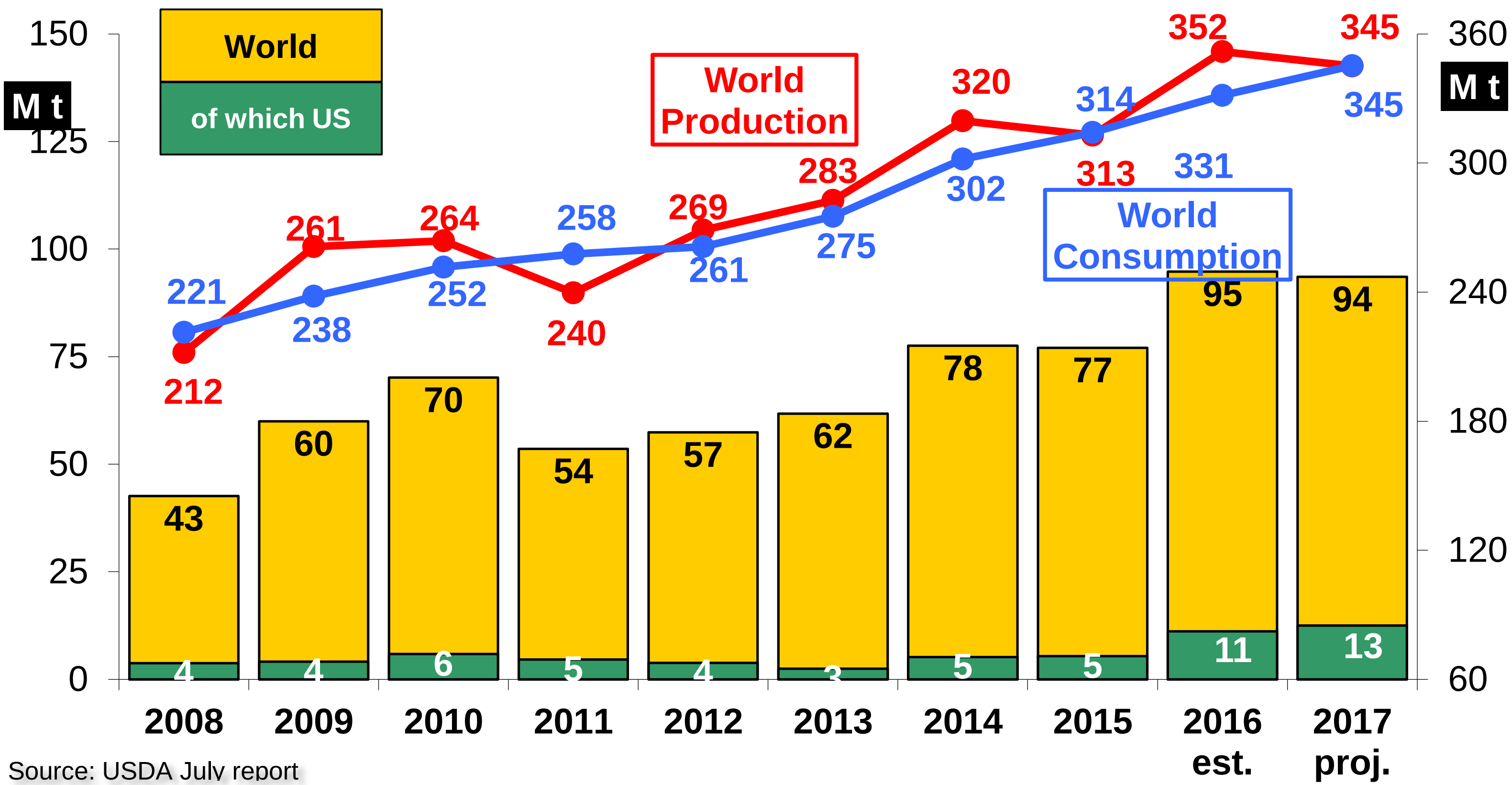
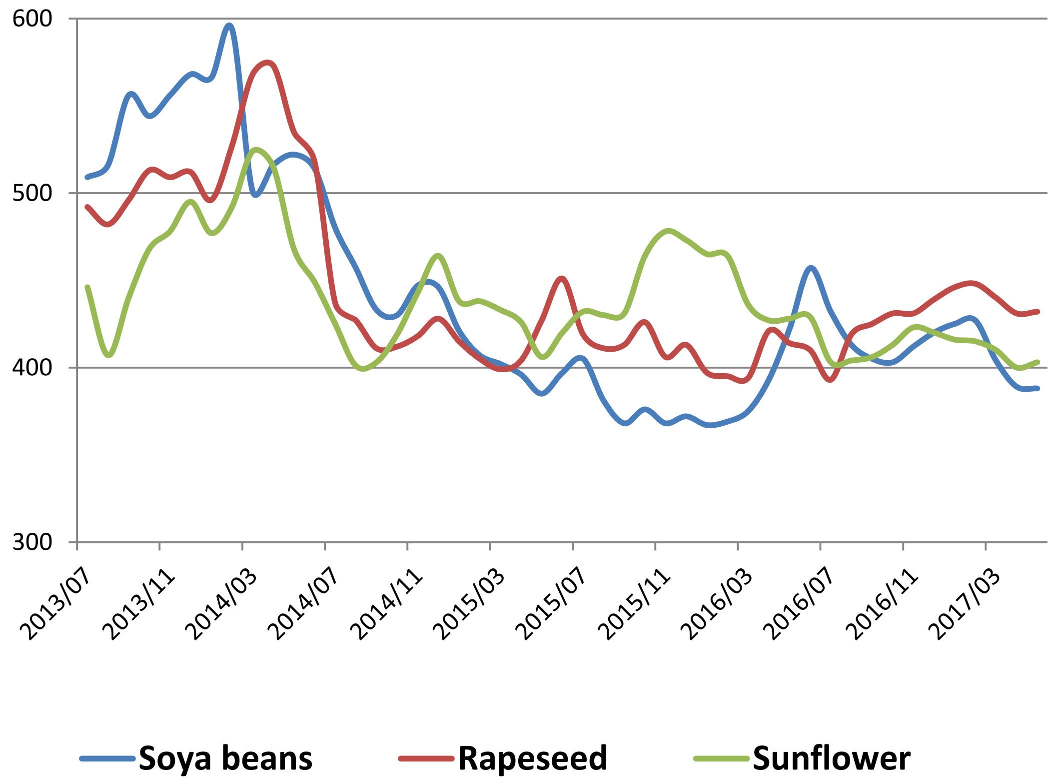
Global Soya Market: ample availabilities after record supply and demand in 2016/17



Source: USDA July report

Global Oilseeds prices: down since 3 years



European Commission

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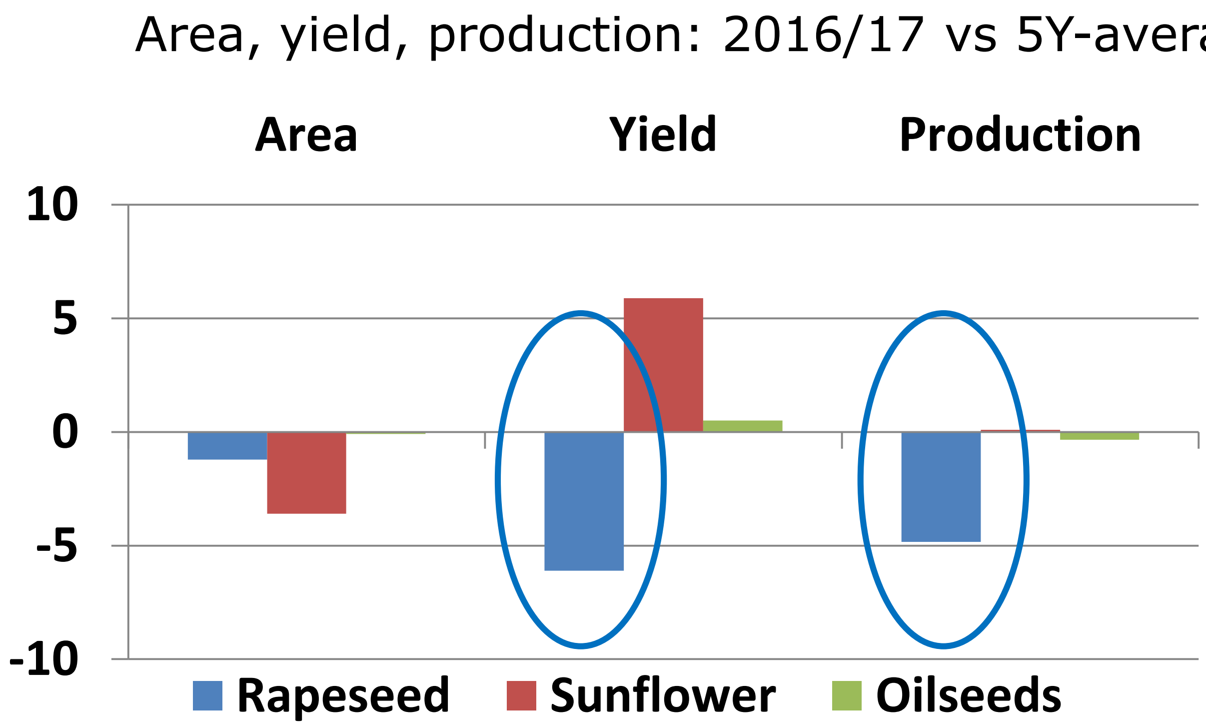
EU oilseeds production:
2016/17: less than 31 million tonnes, incl. less than 20 million tonnes of rapeseed



Agriculture and Rural Development

EU Oilseeds and Protein Crops Production: Recovery and a good year in 2017/18

Million tons	AVG 5 Y (trimmed)	2016/17	2017/18 June 2017	%change 2016/17	%change AVG 5 Y
Rapeseed	20.8	19.7	21.7	10.3	4.3
Sunflower	8.6	8.6	9.0	5.2	5.3
Soja	1.8	2.5	2.5	2.2	40.4
TOTAL	**31.3**	**30.9**	**33.4**	**+8.2%**	**+6.6%**
Field peas	1.6	2.3	2.5	8.6	58.1
Broad beans	1.4	1.9	2.0	4.2	43.5
Lupins	0.2	0.4	0.4	10.4	71.7
TOTAL	**3.2**	**4.6**	**4.9**	**+7%**	**+53%**

EU Oilseeds & Protein Production: Outlook

Oilseeds: will the recovery be sustainable?

Will EU production stay well above 30 million tonnes of oilseeds and 20 million tonnes of rapeseed?

Protein crops: on the rise but still low

High level expected in 2017/18 but still less than 5 million tonnes – room for more?

European Commission

EU Oilseeds Consumption: outlook

Animal feed and … biodiesel

Oils uses: biodiesel (for ≈70% rapeseed oil) and food (for sunflower and soya oil) – will it continue?

Meals uses: feed (key source of protein supply) – most of them imported today and tomorrow?

Protein crops uses: ≈80% feed, ≈20% food – small volumes – which level of EU market demand?

EU net oilseeds trade:
(very) low exports and (very) high imports

2016/17 thousands tonnes	Rapeseed	Soyabean	Sunflower	Total
	OILSEEDS			
Exports	345	211	394	950
Imports	4,600	14,179	800	19,579
Balance	- 4,255	- 13,968	- 406	**- 18,629**
	MEALS			
	Rapeseed	Soyabean	Sunflower	Total
Exports	484	278	244	1,006
Imports	181	18,165	3,596	21,942
Balance	303	- 17,887	- 3,352	**- 20,936**
	OILS			
	Rapeseed	Soyabean	Sunflower	Total
Exports	343	877	437	1,657
Imports	177	294	1,538	2,009
Balance	166	583	- 1,101	**- 352**

EU Oilseeds Trade: Outlook

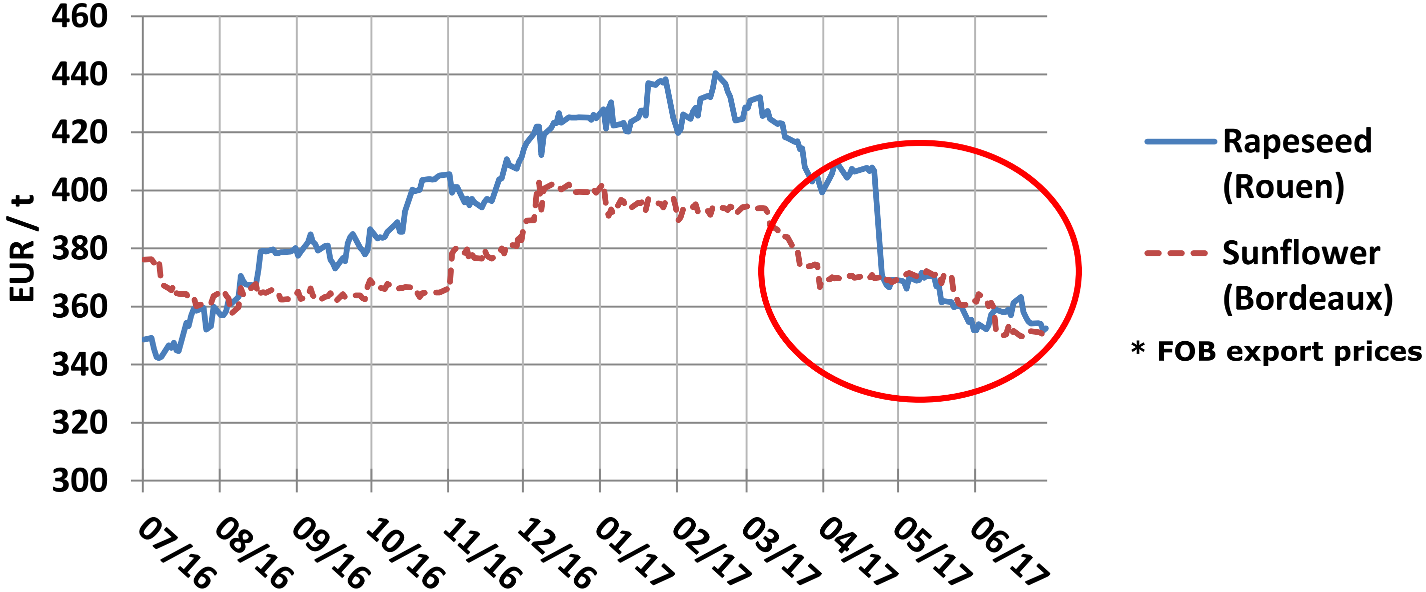
Exports: Any room for EU exports?

Can EU oilseeds (and/or EU oils) be competitive on the global market?

Imports: more and more soya (and soyameal) to come?

Will global soya (and soya meal) continue to be the main supplier for the EU oilseeds/protein market?

EU oilseed prices:
Attractive to EU producers in 2016/17 but…



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EU Oilseeds Prices: Outlook

EU oilseed prices: will the 2016/17 price recovery be sustainable?

Can EU oilseed prices stay close to 400 €/t (and attractive to EU farmers vs cereals prices)?

EU Oilseeds Balance Sheet: EU supply dependent on imports

	2013/14	2014/15	2015/16	2016/17e	2017/18f
Production	**31.5**	**35.4**	**32.1**	**30.7**	**33.3**
Rapeseed	21.0	24.3	21.8	19.7	21.7
Soya beans	1.2	1.8	2.4	2.5	2.5
Sunflower	9.3	9.3	7.9	8.6	9.0
Domestic use	**47.7**	**49.3**	**49.9**	**49.5**	**49.7**
Rapeseed	24.2	25.9	24.9	24.0	24.8
Soya beans	14.7	14.4	16.9	16.6	16.0
Sunflower	8.8	8.9	8.1	8.9	8.9
Imports	**17.4**	**15.8**	**18.6**	**19.6**	**17.5**
Rapeseed	3.5	2.3	3.5	4.6	3.5
Soya beans	13.6	13.2	14.7	14.2	13.6
Sunflower	0.3	0.3	0.5	0.8	0.4
Exports	**1.1**	**1.3**	**0.9**	**1.0**	**0.9**
Rapeseed	0.3	0.6	0.3	0.3	0.3
Soya beans	0.1	0.1	0.1	0.2	0.1
Sunflower	0.7	0.6	0.4	0.4	0.5

European Commission

EU Feed Protein Balance Sheet: a new market monitoring tool

2015/16 Protein source	Million tonnes: Total EU production (A)	EU imports (B)	EU exports (C)	EU Total Domestic Use (D)	EU total feed use (E)	Feed use EU origin (F)	protein content (Feed use) (G)	Million tonnes (crude protein): EU total feed use (H) = (E) * (G)	Feed use EU origin (I) = (F) * (G)	% Feed Use of EU Origin (I) / (H)
CROPS					**179.0**	**162.4**		**18.23**	**16.75**	**92%**
CEREALS (of which)	311.6	20.5	50.8	281.4	174.4	157.7		17.07	15.59	91%
Common Wheat	151.3	4.1	32.7	119.0	55.8	51.7	11.0%	6.14	5.69	
Durum Wheat	8.3	2.5	1.2	8.8	0.3	0.3	12.0%	0.04	0.03	
Barley	61.4	0.3	14.2	48.1	36.3	36.3	10.0%	3.63	3.63	
Grain Maize	59.1	13.3	2.2	73.8	58.5	46.8	8.0%	4.68	3.75	
Rye	7.6	0.0	0.2	7.9	3.0	2.9	11.0%	0.33	0.32	
Sorghum	0.6	0.1	0.0	0.9	0.7	0.5	11.0%	0.08	0.05	
Oats	7.5	0.0	0.2	6.9	5.2	5.2	11.0%	0.57	0.57	
Triticale	12.6	0.0	0.0	12.3	11.0	11.0	11.0%	1.21	1.21	
Other cereals	3.2	0.2	0.0	3.8	3.6	3.0	11.0%	0.40	0.34	
OILSEEDS (feed use without crushing)	32.0	18.6	0.9	49.8	1.2	1.2		0.34	0.34	100%
(columns (E) and (F))										
Soyabeans	2.3	14.6	0.1	16.8	0.8	0.8	33.0%	0.26	0.26	
rapeseed	21.8	3.5	0.3	24.9	0.3	0.3	18.0%	0.06	0.06	
Sunflowerseed	7.9	0.5	0.4	8.0	0.1	0.1	15.4%	0.02	0.02	
PULSES (of which)	4.4	0.7	0.9	4.2	3.4	3.4		0.83	0.83	100%
Field Peas	2.1	0.3	0.4	2.0	1.5	1.5	22.5%	0.34	0.34	
Broad beans	2.0	0.3	0.4	1.9	1.6	1.6	25.0%	0.41	0.41	
Lupins	0.4	0.1	0.1	0.4	0.4	0.4	22.5%	0.08	0.08	
CO-PRODUCTS					**83.9**	**44.6**		**25.87**	**9.75**	**38%**
SOYBEAN MEALS (of which)					31.2	1.5		14.4	0.7	5%
Soybean meal (from EU soybean production)	1.5				1.5	1.5	44.0%	0.66	0.66	
Soybean meal (imported soybeans crushing)	10.1				9.9	0.0	47.0%	4.63	0.00	
Soybean meal (traded as such)		19.8	0.3		19.5	0.0	45.5%	8.89	0.00	
Soybean Protein Concentrate	0.3				0.3	0.0	62.5%	0.19	0.02	
RAPESEED MEALS (of which)					13.8	11.8		4.5	3.9	86%
Rapeseed meal (from EU rapeseed production)	11.8				11.8	11.8	33.0%	3.90	3.90	
Rapeseed meal (imported rapeseed crushing)	1.9				1.9	0.0	33.0%	0.64	0.00	
Rapeseed meal (traded as such)		0.4	0.5		0.0	0.0	33.0%	0.00	0.00	
SUNFLOWER MEALS (of which)					6.8	3.6		2.1	1.0	47%
Sunflower meal (from EU sunflowerseed production)	3.6				3.6	3.6	28.0%	1.01	1.01	
Sunflower meal (imported sunflowerseed crushing)	0.2				0.2	0.0	35.0%	0.08	0.00	
Sunflower meal (traded as such)		3.2	0.2		3.0	0.0	35.0%	1.05	0.00	
OTHERS (excluding on-farm use)					32.1	27.6		4.8	4.2	86%
of which										
Palmkern meal	0.0	2.3	0.0	2.3	2.3	0.0	16.0%	0.36	0.00	
Other oilseed meals	0.6	0.0	0.0	0.6	0.6	0.6	37.0%	0.23	0.22	
Corn Germ meal	0.4	0.0	0.0	0.4	0.4	0.4	26.0%	0.10	0.10	
Corn Gluten Meal					0.1	0.1	60.0%	0.06	0.06	
Corn Gluten Feed	2.8	0.3	0.1	2.9	2.9	2.8	19.0%	0.55	0.52	
Distiller's Dried Grains with Solubles	3.4	0.6	0.2	3.8	3.8	3.4	30% for wheat 27% for	1.1	1.0	
Wet Distillers Grain					n.a.	n.a.				
Wheat bran	8.3	0.0	0.0	8.3	8.3	8.3	15.5%	1.29	1.29	
Wheat gluten feed					0.4	0.4		0.00	0.00	
Citrus pulp	0.0	0.5	0.0	0.5	0.5	0.0	7.5%	0.04	0.00	
Beet pulp pellets	4.5	0.8	0.1	5.1	5.1	4.5	7.5%	0.39	0.33	
Molasses	5.0	1.1	0.1	6.0	2.4	2.0	10.5% beet 4% cane	0.23	0.21	
Processed Proteins (potatoes)					0.2	0.2	12.0%	0.02	0.02	
Dried Fodder	4.0				n.a.	n.a.	16.0%			
Former Foodstuff					5.0	5.0	8.8%	0.44	0.44	
OTHER SOURCES					**2.2**	**2.1**		**0.87**	**0.79**	**90%**
(excluding on-farm use)										
Processed Animal Proteins					0.6	0.6	58% for pork 63%	0.36	0.36	
Fish Meal	0.4	0.4	0.2	0.5	0.5	0.4	68.0%	0.34	0.26	
Whey Powder					0.9	0.9	12.5%	0.11	0.11	
Skimmed Milk Powder	1.6		0.6	1.0	0.2	0.2	34.0%	0.06	0.06	

From Crops

- 18.23 million tonnes of crude protein
- 92% EU origin

From Co-products

- 25.87 million tonnes of crude protein
- 38% EU origin

European Commission

Thank you for your attention!

More information on
EU Crops Market Observatory:

https://ec.europa.eu/agriculture/market-observatory/crops_en

Agriculture and Rural Development