Crops Market Observatory

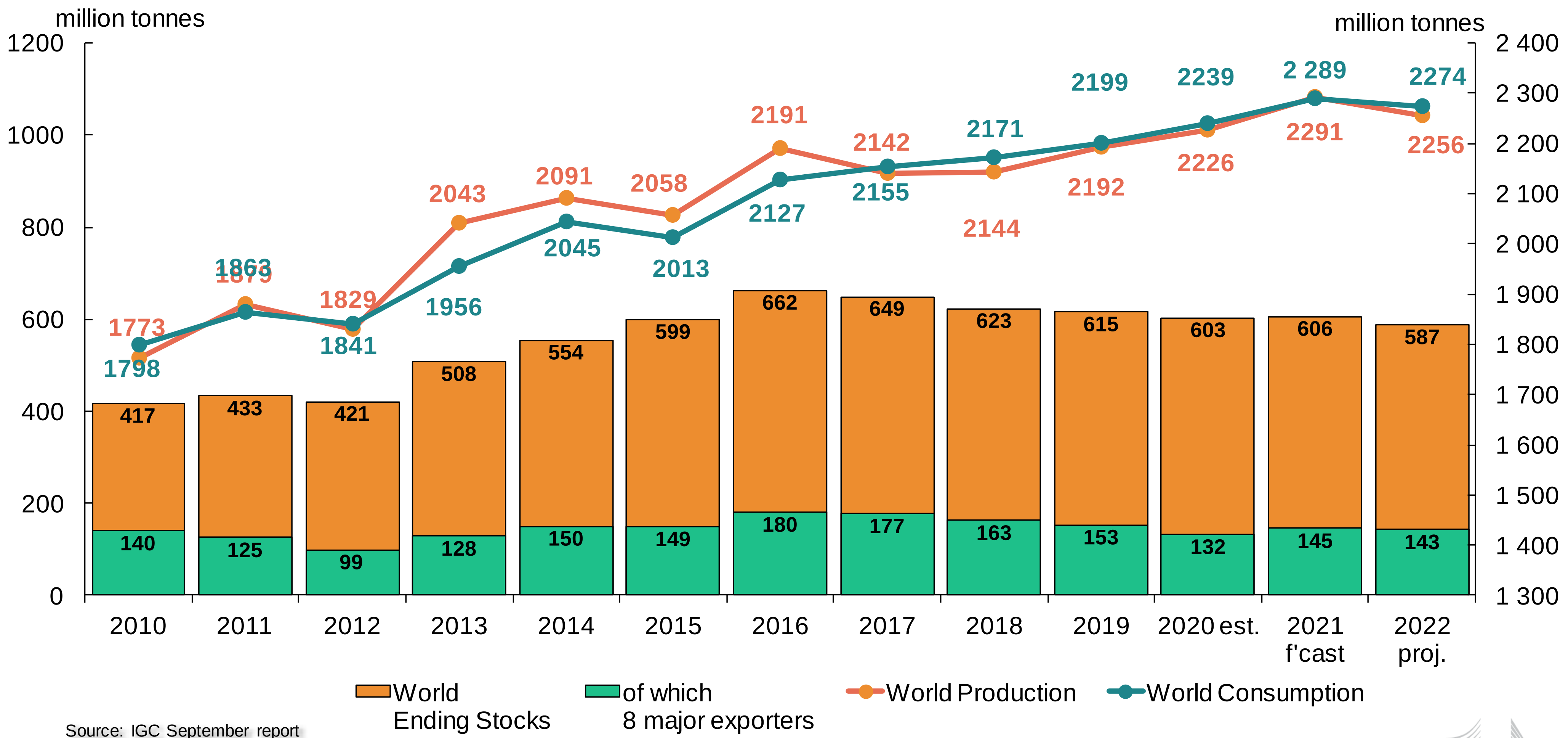
17 October 2022

AGRI-E4

Cereals

- World Cereals market

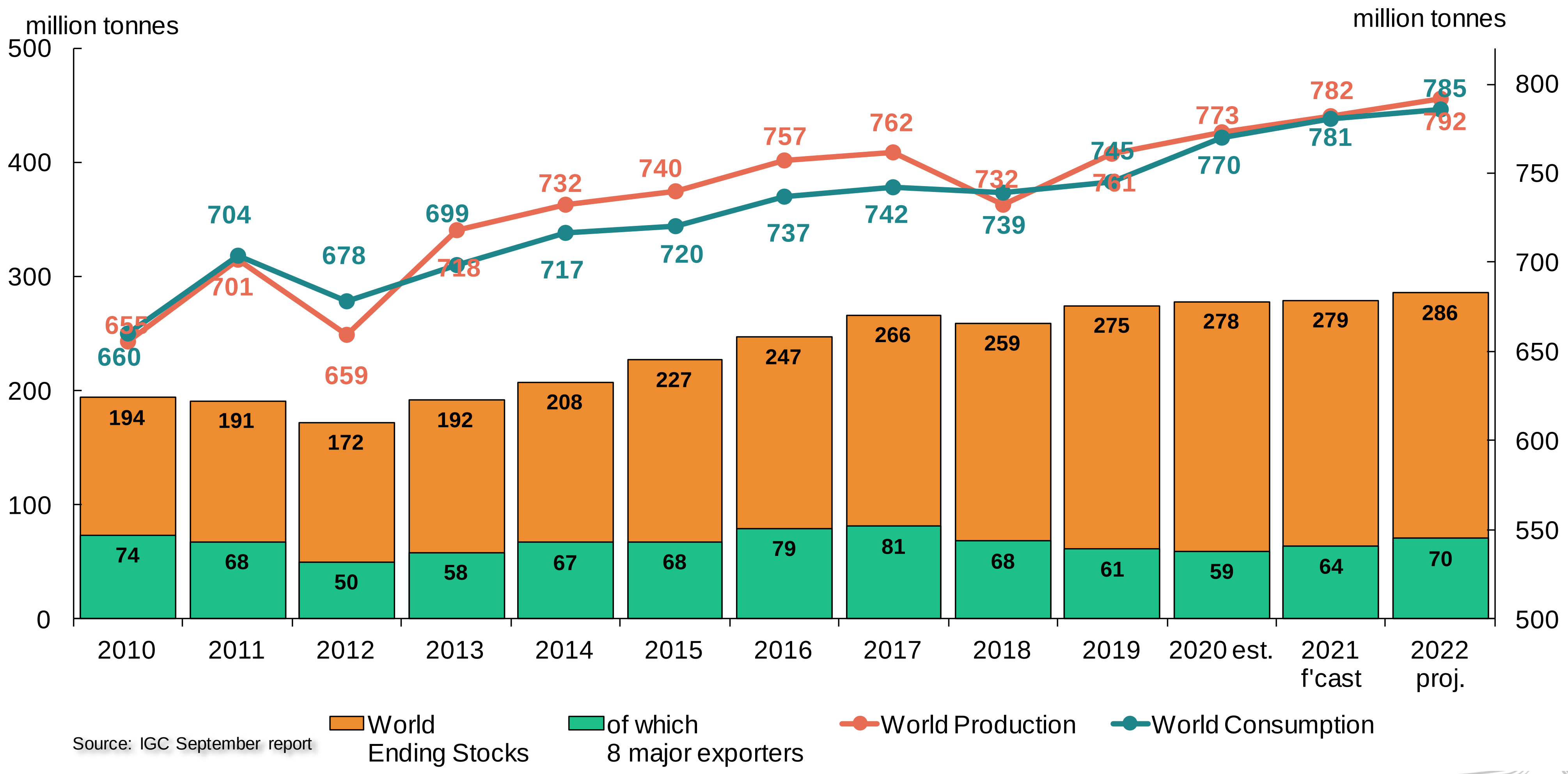
World cereals: IGC



Source: IGC September report

European Commission

World wheat: IGC



Source: IGC September report

Summary of the IGC Grain Market Report
(GMR 536 of 22/09/2022)
Outlook for 2022/23

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

	2019/20	2020/21	2021/22 *(estimate)*	2022/23 *(forecast)*	*m/m change (m t)*	y/y change
EU-27 **(from 2020/21)** *EU-27 + UK to 2019/20*	155.0	125.7	138.3	**133.3**	*+1.3*	-3.6%
USA	52.6	49.8	44.8	**48.5**	-	+8.3%
Canada	32.7	35.4	22.3	**34.7**	*+1.7*	+55.6%
Russia	73.6	85.4	75.0	**93.4**	*+5.8*	+24.5%
Ukraine	29.2	25.4	33.0	**21.5**	*+2.0*	-35.0%
Australia	14.5	31.9	36.3	**32.2**	*+1.2*	-11.3%
China	133.6	134.3	136.9	**138.0**	-	+0.8%
India	103.6	107.9	109.6	**106.8**	*+1.8*	-2.5%
World	**760.7**	**773.2**	**781.6**	**791.9**	***+13.8***	**+1.3%**

Summary of the IGC Grain Market Report
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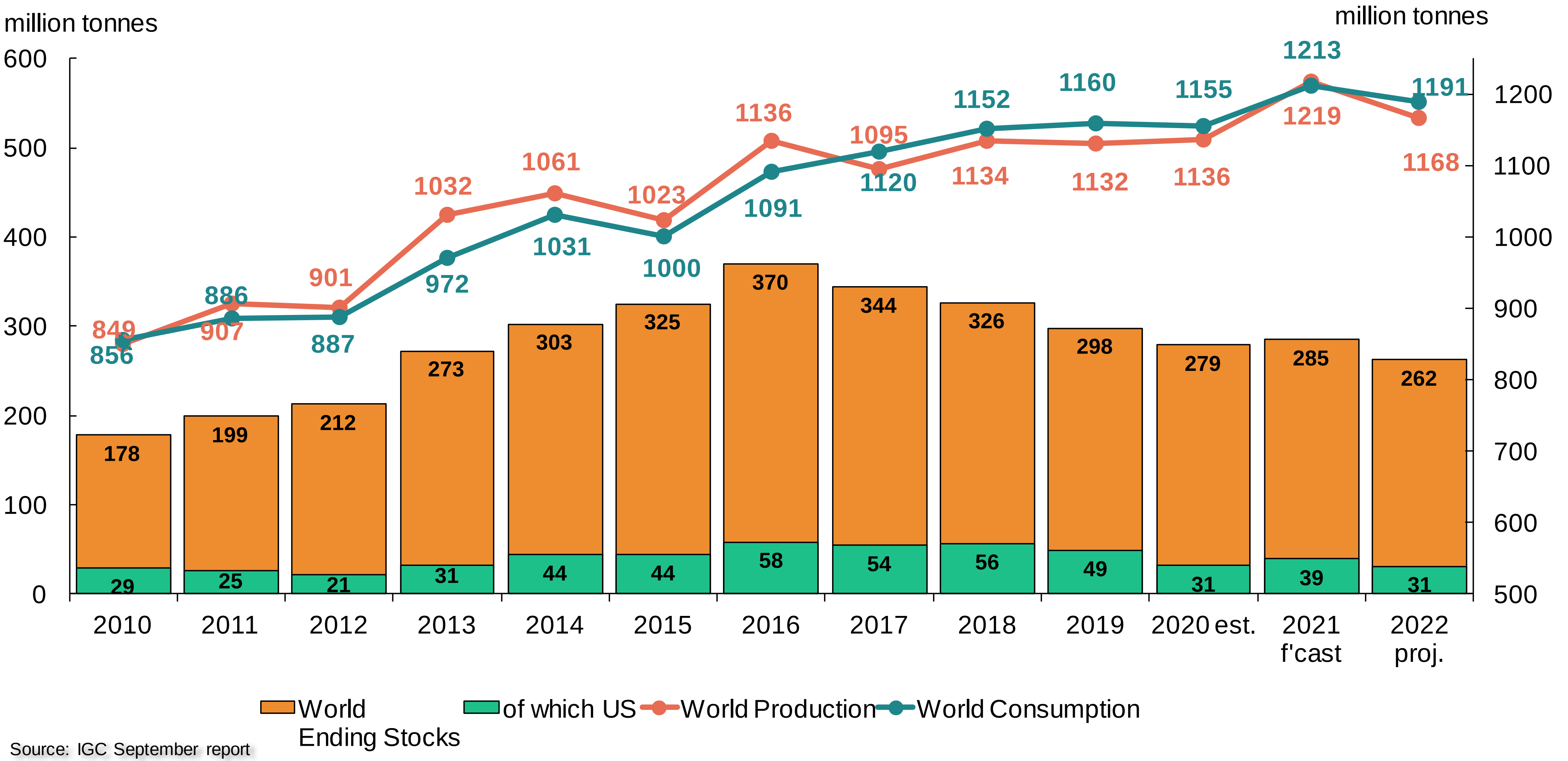
Outlook for 2022/23

Total world grains production is forecast at 2,256.0m t in 2022/23, -35.4m t or -1.5% below the record of the previous season. Consumption is projected to decline for the first time since 2015/16, reaching 2,274.3m t (-14.2m or -0.6% y/y), incl. 756.1m of food use (+0.6% y/y), 1,017.9m for feeding (-2.0%) and 368.3m for industrial use (+0.1% y/y). Ending stocks: 587m t (-3.0% y/y).

Wheat: boosted by record harvests in China and Russia in particular, world production is forecast at a new record of 791.9m t (+10.2m t or +1.3% y/y). Driven by record supply, world consumption is expected to reach a new peak of 785.5m t (+0.6% y/y), incl. 547.3 million tonnes of food use (+0.4%) and 148.7 million tonnes for feeding (+0.6%). Growth rate would be rather slow and below the recent five-year average. Ending stocks are projected at 285.6m t (+2.3% y/y), also an all-time high, however 48.1% of it is attributed to China. Including record large stocks in Russia, major exporters' inventories are now seen at an above-average level of 70.3m t (+10.4% y/y).

World trade is forecast at 192.8m t (-3.9m or -2.0% y/y) in 2022/23 (Jul/Jun). High prices and improved domestic supplies at some buyers are expected to reduce import demand. RUS is forecast to remain the main exporter with 36.5m t (+10.6% y/y), followed by the **EU** (34.5m t; +13.7%).

World maize: IGC



Source: IGC September report

European Commission

Summary of the IGC Grain Market Report
(GMR 536 of 22/09/2022)
Outlook for 2022/23

Maize production in selected countries (million tonnes)

	2019/20	2020/21	2021/22 *(estimate)*	2022/32 *(forecast)*	*m/m change (m t)*	y/y change
EU-27 **(from 2020/21)** ***EU-27 + UK to 2019/20***	68.1	68.0	70.3	**56.8**	*-2.8*	-19.2%
USA	346.0	358.4	383.9	**354.2**	*-10.5*	-7.7%
Ukraine	35.9	30.3	42.1	**29.2**	*+1.5*	-30.7%
Russia	14.3	13.9	14.6	**15.0**	*+0.4*	+2.7%
Brazil	102.5	87.1	113.3	**123.1**	-	+8.7%
Argentina	58.4	60.5	57.0	**60.6**	-	+6.4%
China	260.8	260.7	272.6	**273.0**	-	+0.2%
World	1,131.5	1,136.0	1,218.8	**1,167.9**	***-10.7***	**-4.2%**

Summary of the IGC Grain Market Report

(GMR 536 of 22/09/2022)

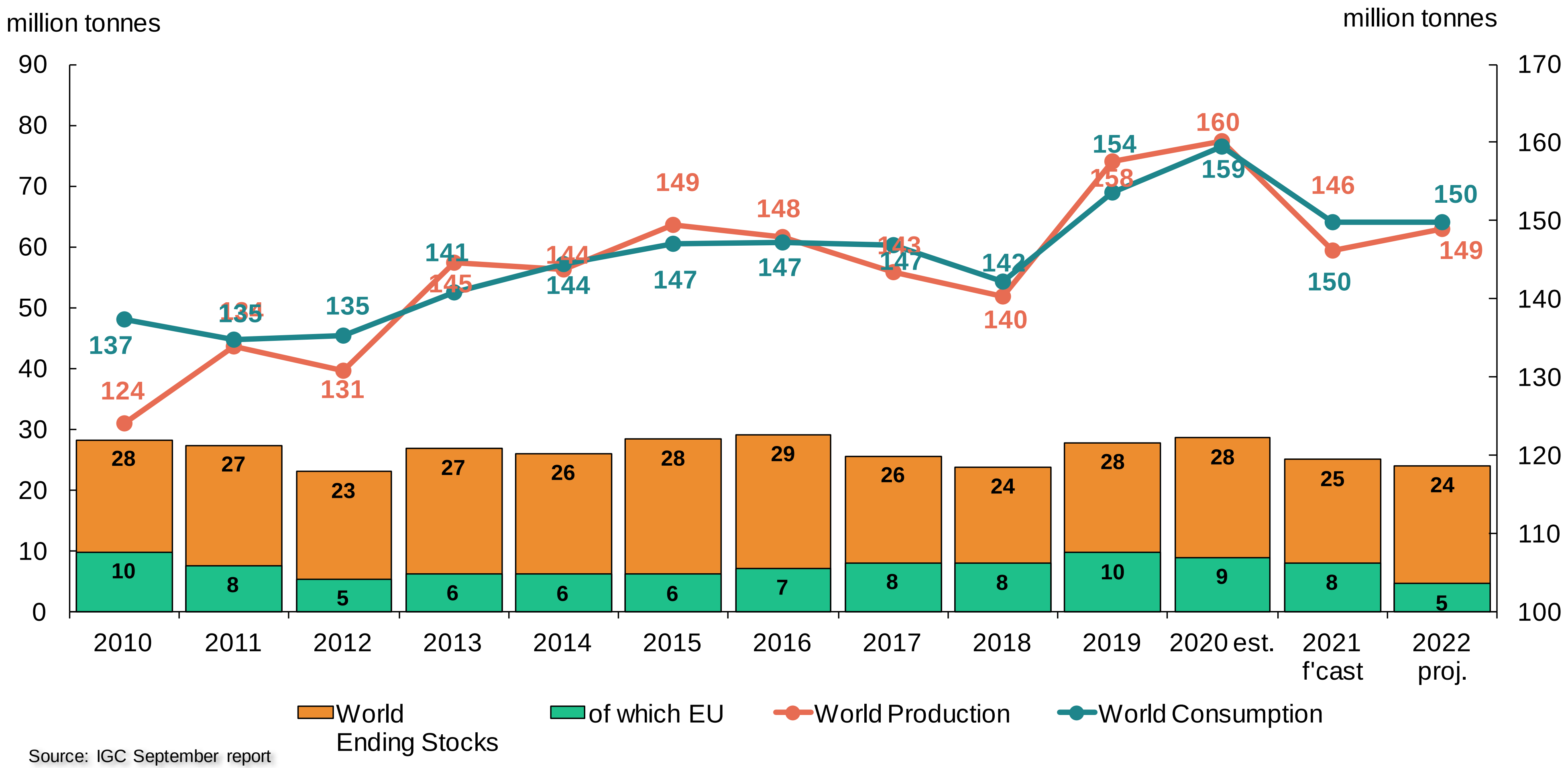
Outlook for 2022/23

Maize: despite an important annual decline, world production is forecast to be the 2nd largest on record reaching 1,167.9m t (-50.9m or -4.2% y/y). Mainly linked to reduced feed use, consumption is seen 1.8% lower y/y at 1,190.5m t (-22.2m y/y), incl. 699.9 m for feeding (-2.8% y/y) and 309.2m for industrial use (+0.2%). Ending stocks are projected to fall to their lowest level since 2012/13, 262.1m t (-8.0% y/y). Of the total 175m t is attributed to China (-7.0% y/y; 66.8% of world total).

Exreme hot and dry conditions severely reduced yield prospects in the EU and production is forecast at a 15-year low of 56.8m t (-19% y/y). Linked to smaller area and especially worsening yield potential, the US crop forecast was lowered by 10.5m to 354.2m t (-7.7%). World trade is forecast to decline by 3.9% y/y to 172.3m t in 2022/23 (Jul/Jun). UKR exports are forecast at 17.0m t (-28.3%) on larger crop and continued strong pace of shipments, while US exports are expected to reach 57.9m t only (-10.5%). EU imports are estimated at 20.5m t (+15% y/y), making the EU the largest buyer, followed by China.

Barley: world production is forecast at 148.8m t (+2.7m or +1.9% y/y), close to the five-year average. Aided by ample rains, yields were very strong in **RUS** with the crop forecast at a 14-year peak of 21.4m t (+21.6% y/y). The outlook remains favourable in **AUS**, although too much rainfall is a concern in some eastern areas. Forecast for the AUS crop is at 12.3m t (-11.9%). Consumption is forecast to reach 149.9m t (+0.1% y/y), incl. feed use at 104.5m t (+0.9%). Stocks are forecast at a below-average 23.9m t (-4.1% y/y). World trade (July/June) of barley is placed at 30.8m t (+1.2m m/m; -4.5% y/y). **EU** exports are forecast at 7.0m t (-3.5%), while **AUS** is expected to remain the largest exporter with 7.2m t (-8.3% y/y).

World barley: IGC



Source: IGC September report

Summary of the IGC Grain Market Report
(GMR 536 of 22/09/2022)
Outlook for 2022/23

Barley production in selected countries (million tonnes)

	2019/20	2020/21	2021/22 *(estimate)*	2022/23 *(forecast)*	*m/m change (m t)*	y/y change
EU-27 **(2020/21)** *EU-27 + UK to 2019/20*	63.4	54.0	52.2	**51.3**	*-0.1*	-1.7%
United Kingdom	8.2	8.1	7.0	**7.0**	-	+0.6%
Russia	19.9	20.6	17.6	**21.4**	*+1.5*	+21.6%
Ukraine	9.5	7.9	10.0	**6.5**	*+1.2*	-34.7%
Australia	10.1	14.6	13.9	**12.3**	*+1.2*	-11.9%
Canada	10.4	10.7	7.0	**9.4**	*+0.3*	+35.5%
Turkey	7.6	8.3	5.8	**7.4**	-	+28.7%
World	157.6	160.2	146.1	**148.8**	***+3.6***	**+1.9%**

European Commission

Summary of the IGC Grain Market Report

(GMR 536 of 22/09/2022)

Outlook for 2022/23

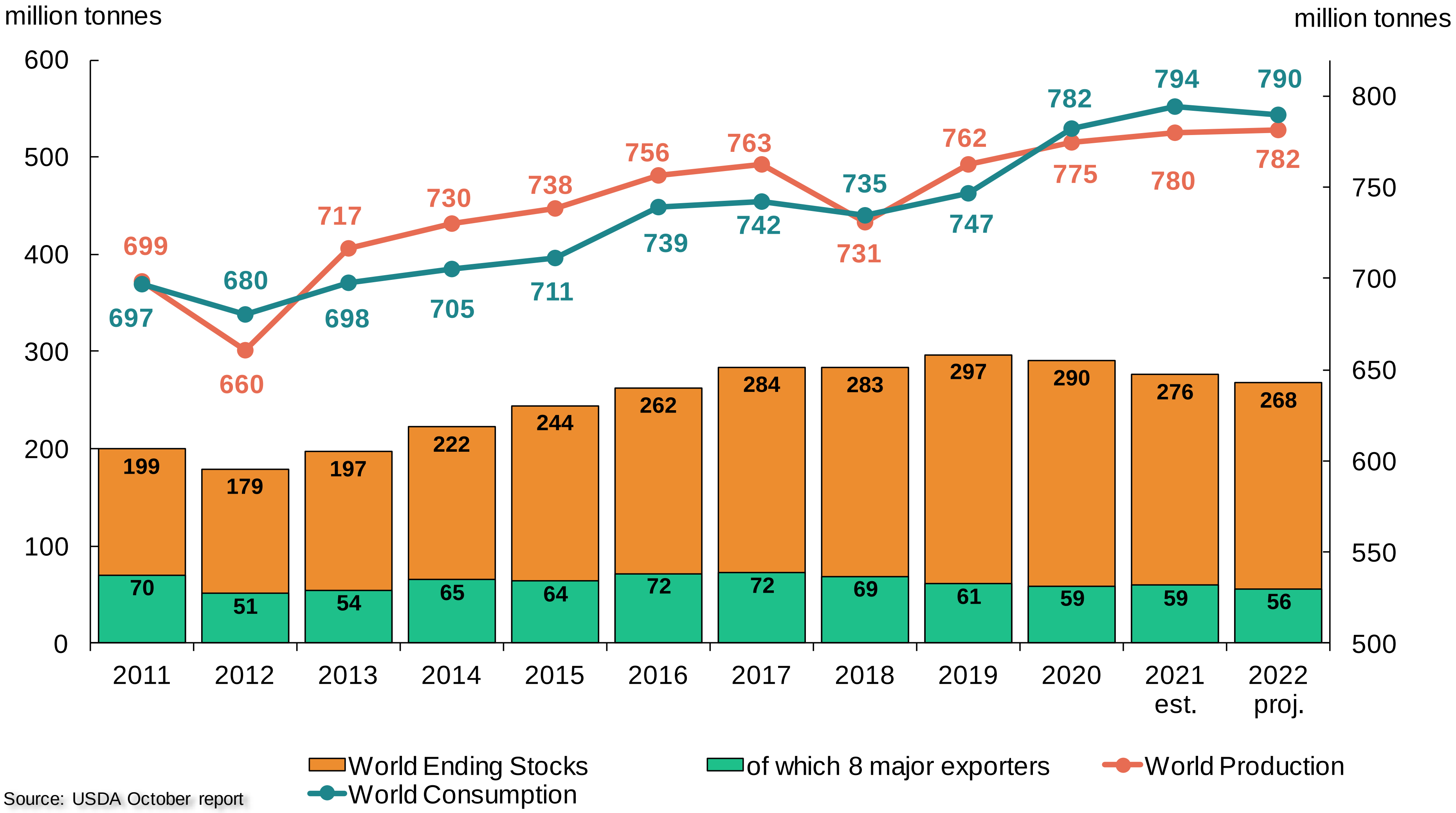
Production and Export Forecasts for Ukraine (million tonnes)

Production (m t)	2019/20	2020/21	2021/22	2022/23	y/y %
Wheat	29.2	25.4	33.0	21.5	*-35.0*
Maize	35.9	30.3	42.1	29.2	*-30.7*
Barley	9.5	7.9	10.0	6.5	*-34.7*
Exports (m t; Jul/Jun)					
Wheat	21.0	16.8	18.9	13.0	*-31.2*
Maize	30.4	23.1	23.7	17.0	*-28.3*
Barley	5.0	4.2	5.8	1.8	*-69.6*
Production (m t)					
Rapeseed	3.5	2.6	2.9	3.0	*+2.5*
Soya beans	3.7	2.8	3.4	3.6	*+4.1*
SFS	16.5	13.1	16.4	10.5	*-35.9*
Exports (m t; Oct/Sep)					
Rapeseed	2.5	2.5	2.4	2.4	*-1.5*
Soya beans	2.4	1.4	1.5	1.5	*+0.0*
SFS	0.06	0.2	1.7	1.2	*-31.5*

World Cereals Forecasts

USDA

World wheat: USDA



Source: USDA October report

USDA 2022/23 Supply and Demand Estimates

(WASDE – 629 of 12 October 2022)

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

	2022/23	Share of total	2021/22	m/m change (m t)	y/y change (%)
EU-27	**134.8**	*17.2%*	138.3	*+2.7*	*-2.6%*
USA	**44.9**	*5.7%*	44.8	*-3.6*	*+0.2%*
Canada	**35.0**	*4.5%*	22.3	-	*+57.0%*
Russia	**91.0**	*11.6%*	75.2	-	*+21.1%*
Ukraine	**20.5**	*2.6%*	33.0	-	*-37.9%*
Australia	**33.0**	*4.2%*	36.4	-	*-9.2%*
Argentina	**17.5**	*2.2%*	22.5	*-1.5*	*-22.2%*
China	**138.0**	*17.7%*	137.0	-	*+0.8%*
India	**103.0**	*13.2%*	109.6	-	*-6.0%*
World	**781.7**	***100.0%***	779.8	***-2.2***	***+0.2%***

Wheat import forecasts for selected countries and regions

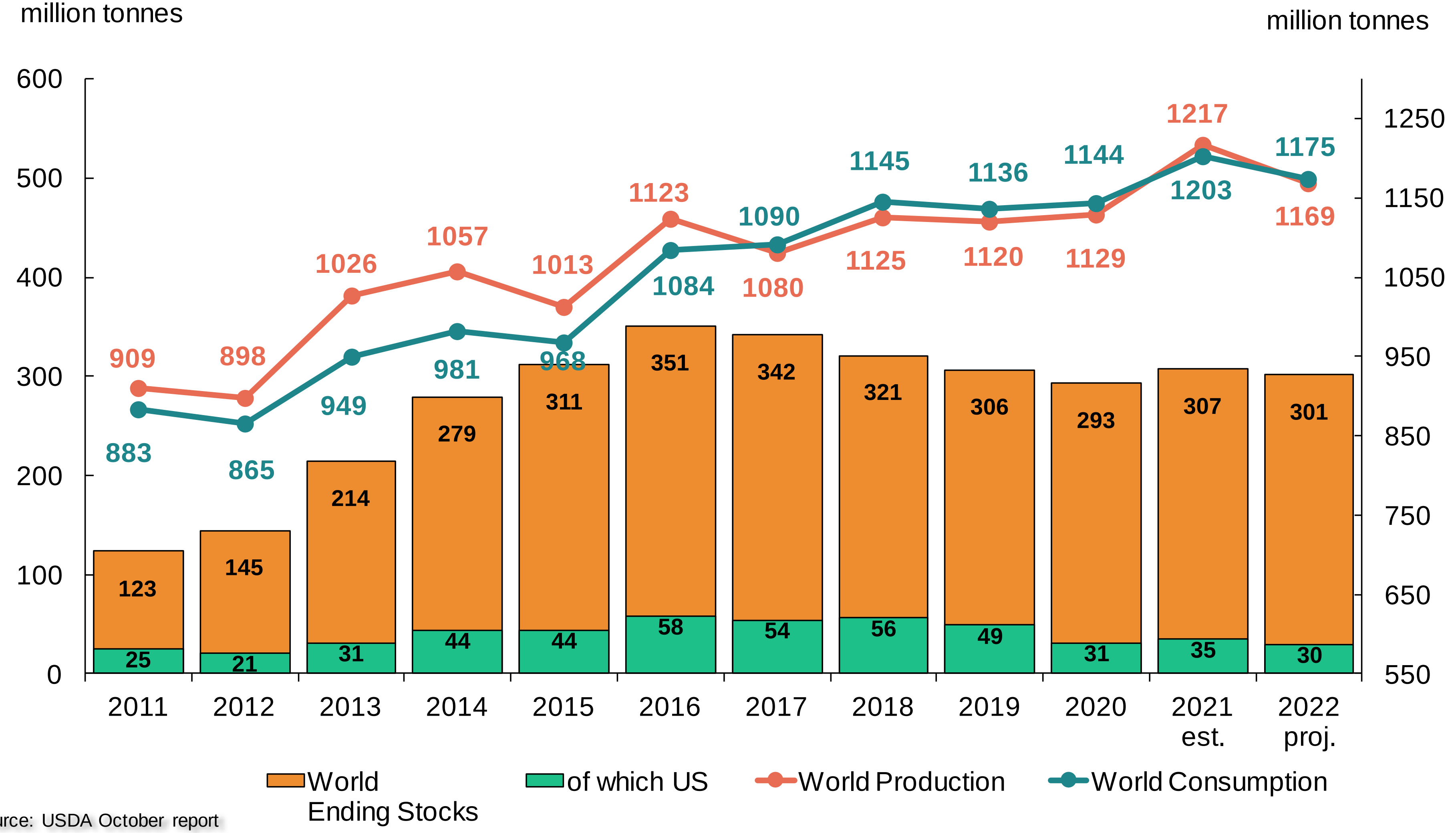
	2019/20	2020/21	2021/22	2022/23*
Algeria	7.145	7.680	8.286	**8.400**
Egypt	12.811	12.149	11.500	**11.000**
Morocco	4.879	5.191	4.726	**7.500**
North Africa	***27.991***	***28.246***	***27.507***	***30.200***
Nigeria	5.338	6.586	6.187	**6.500**
Sub-Saharan Africa	***26.953***	***26.581***	***26.360***	***26.410***
Saudi Arabia	3.652	2.818	3.052	**3.000**
Vietnam	3.570	3.900	4.527	**4.100** *(-0.1m m/m)*
Indonesia	10.586	10.649	10.700	**11.200**
SE Asia	***27.561***	***26.704***	***27.421***	***27.100*** *(-0.1m)*
China	5.376	10.618	9.568	**9.500**

Source: USDA (data in million tonnes, incl. flour, July/June); *forecast

North Africa = Algeria, Egypt, Libya, Morocco and Tunisia

South East Asia = Indonesia, Malaysia, Philippines, Thailand and Vietnam

World maize: USDA



Source: USDA October report

USDA 2022/23 Supply and Demand Estimates
(WASDE – 629 of 12 October 2022)

Maize production forecasts in selected countries (million tonnes)

	2022/23 *(Projection)*	Share of total	2021/22 (Est.)	*m/m change (m t)*	y/y change (%)
EU-27	**56.2**	*4.8%*	71.0	*-2.6*	*-20.8%*
USA	**353.0**	*30.2%*	382.9	*-1.2*	*-7.8%*
Ukraine	**31.5**	*2.7%*	42.1	-	*-25.2%*
Russia	**15.0**	*1.3%*	15.2	-	*-1.5%*
Brazil	**126.0**	*10.8%*	116.0	-	*+8.6%*
Argentina	**55.0**	*4.7%*	51.5	-	*+6.8%*
China	**274.0**	*23.4%*	272.6	-	*+0.5%*
South Africa	**17.3**	*1.5%*	16.3	-	*+6.1%*
World	**1,168.7**	***100%***	1,217.3	***-3.8***	***-4.0%***

USA: USDA Small Grains 2022 Summary Report

30-09-2022	2020	2021	2022	y/y
All wheat production (m t)	49.75	44.80	**44.90**	+0.2%
Harvested area (m ha)	*14.89*	*15.03*	***14.36***	-4.5%
Winter wheat production (m t)	31.88	34.77	**30.04**	-13.6%
Harvested area (m ha)	*9.32*	*10.31*	***9.49***	*-7.9%*
Durum wheat production (m t)	1.88	1.02	**1.74**	+69.9%
Harvested area (m ha)	*0.67*	*0.62*	***0.64***	*+3.6%*
Oats production (m t)	0.95	0.58	**0.84**	+44.7%
Harvested area (m ha)	*0.41*	*0.26*	***0.36***	*+36.9%*
Barley production (m t)	3.72	2.61	**3.80**	+45.2%
Harvested area (m ha)	*0.90*	*0.81*	***0.98***	*+22.3%*

European Commission

Canada: Outlook for Principle Field Crops in 2022/23

(source: **AAFC**; crop year = Aug/July)

23-09-2022	2020/21	2021/22 f'	2022/23 f'	m/m	y/y
Durum prod' (m t)	6.57	3.04	**6.12**	***-0.15***	+101.3%
exports (m t)	5.77	2.72	**5.00**	**-**	+84.1%
All wheat prod'(m t)	35.44	22.30	**34.70**	***+0.20***	+55.6%
exports (m t)	26.30	15.13	**23.20**	***+0.20***	+53.4%
Barley prod' (m t)	10.74	6.96	**9.43**	***+0.03***	+35.5%
exports (m t)	4.28	2.60	**3.45**	**-**	+32.5%
Oats prod' (m t)	4.58	2.81	**4.65**	***+0.06***	+65.7%
exports (m t)	2.97	2.30	**2.85**	**-**	+23.8%
Canola/rapeseed prod' (m t)	19.49	13.76	**19.10**	***+0.70***	+38.8%
Exports (m t)	10.59	5.27	**9.30**	***+0.10***	+76.5%

Brazil

CONAB October report: First S&D Outlook for **2022/23** (www.conab.gov.br)

- **Maize**: due to increased area and improved yields, total production is projected at a new record of 126.9m t. Domestic demand is expected to remain strong reaching 81.8m t (+6.2% y/y), while exports are forecast at 45.0m t (+21.6% y/y).

- **Soya beans**: reflecting larger area and a strong recovery of yields, production is expected to increase by 21.3% to 152.4m t. Amid larger availabilities, exports are projected at 95.9m t (+22.5% y/y), while domestic consumption at 55.0m t (+5.2% y/y).

- **Wheat:** production is forecast at a new peak of 9.4m t with domestic demand placed at 12.3m t (+2.0%) and imports at 6.1m t (+0.3%).

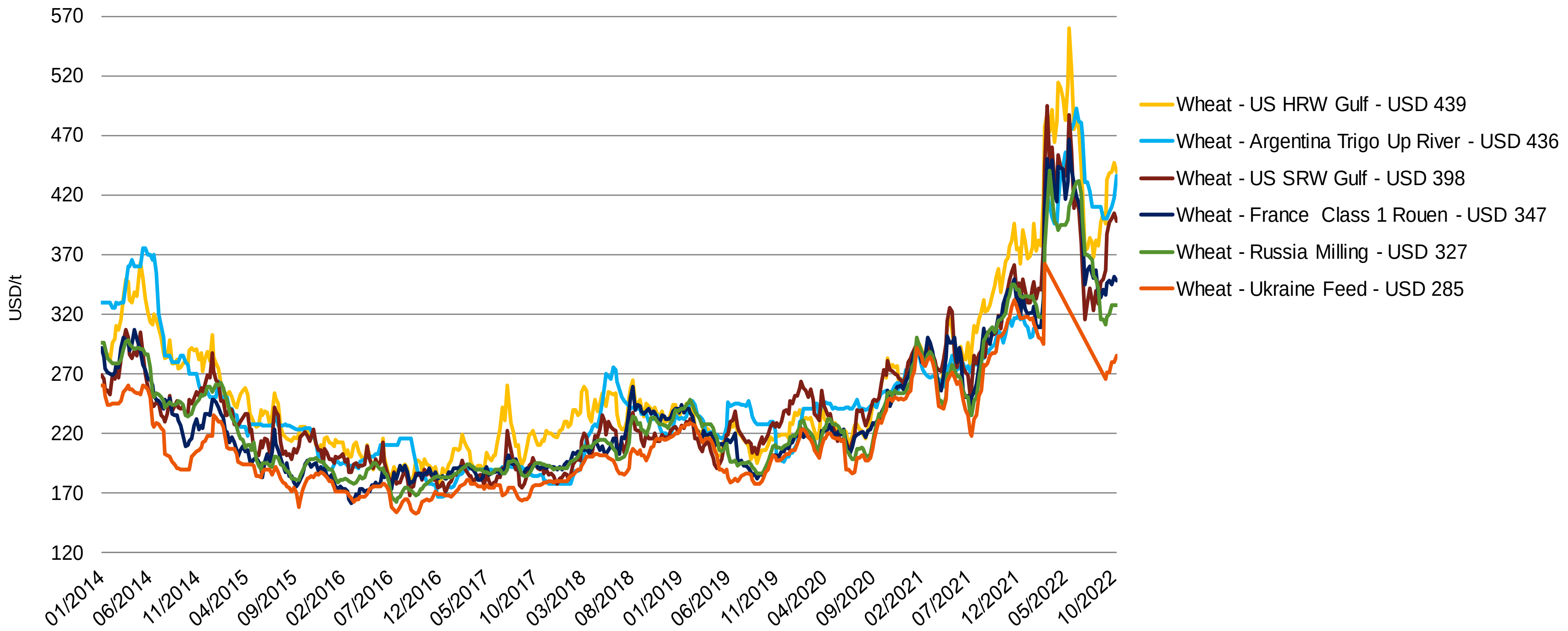
6 October 2022	Forecast	+/- previous f'cast	Previous year	+/- y/y
Wheat prod (m t)	9.4	-	7.7	+21.9%
Soya beans prod (m t)	152.4	n/a	125.5	+21.3%
Maize prod (m t)	126.9	n/a	112.8	+12.5%
Maize 1st crop	*28.7*	*n/a*	*25.0*	*+14.6%*
Maize 2nd crop	*96.3*	*n/a*	*85.6*	*+12.4%*
Maize 3rd crop	*2.0*	*n/a*	*2.2*	*-8.5%*
Maize exports	*45.0*	*n/a*	*37.0*	*+21.6%*

Australia – outlook for 2022/23

(source: ABARES – September 2022)

	2020/21	2021/22 (f)	*2022/23 (e)*	Sept vs. June	y/y
Wheat area (m ha)	12.6	13.0	**13.1**	-0.1m h	+0.2%
production (m t)	*31.9*	*36.3*	***32.2***	*+1.9m t*	*-11.3%*
exports (m t) (Oct/Sep)	23.7	27.8	**24.5**	*+1.0m t*	*-11.8%*
Barley area (m ha)	5.5	4.4	**4.2**	+0.1m ha	-5.1%
production (m t)	*14.6*	*13.9*	***12.3***	*+1.4m t*	*-11.9%*
exports (m t) (Nov/Oct)	8.3	8.0	**7.6**	*+0.5m t*	*-5.3%*
Canola area (m ha)	2.6	3.2	**3.6**	+0.2m ha	+12.4%
production (m t)	*4.8*	*6.8*	***6.6***	*+1.0m t*	*-1.8%*
exports (m t) (Nov/Oct)	3.5	5.6	**5.5**	*+0.9m t*	*-0.4%*
Oats area (m ha)	1.1	0.9	**0.7**	-	-12.3%
production (m t)	*1.9*	*1.6*	***1.3***	*+0.1m t*	*-18.1%*

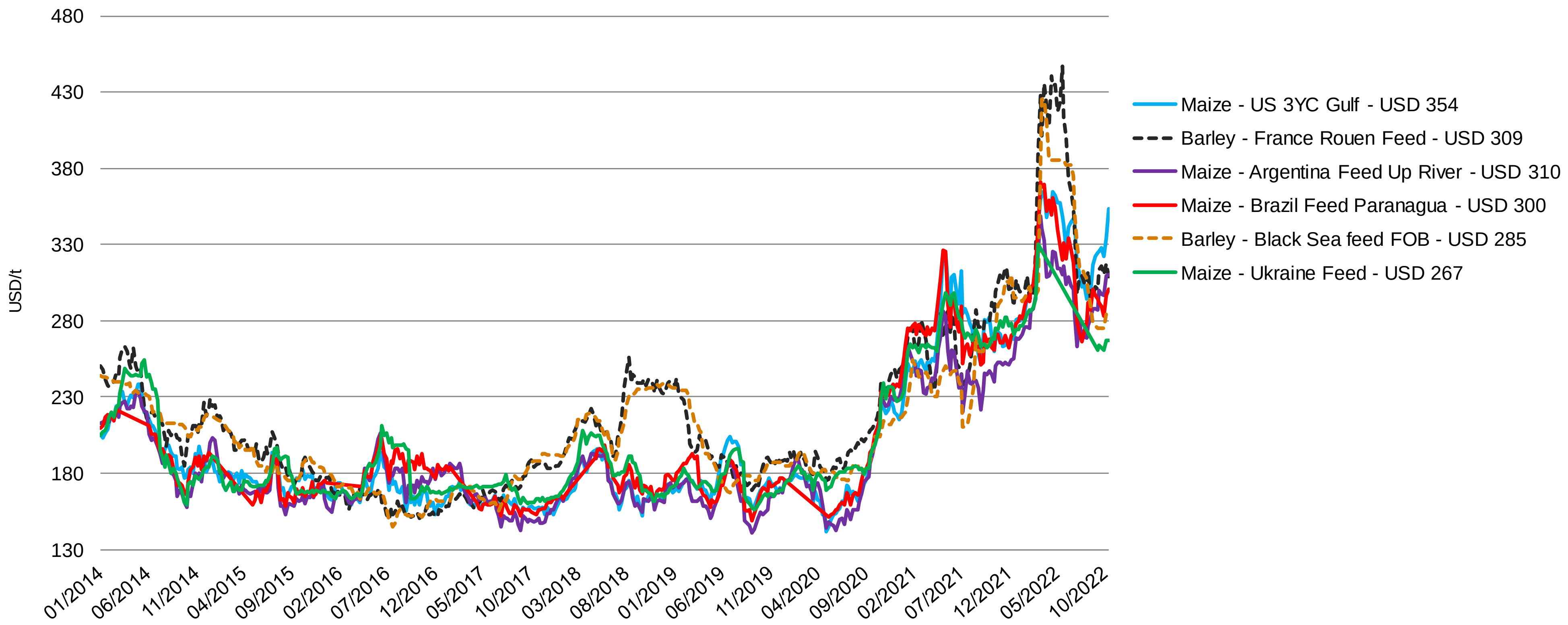
World common wheat prices (USD/t)



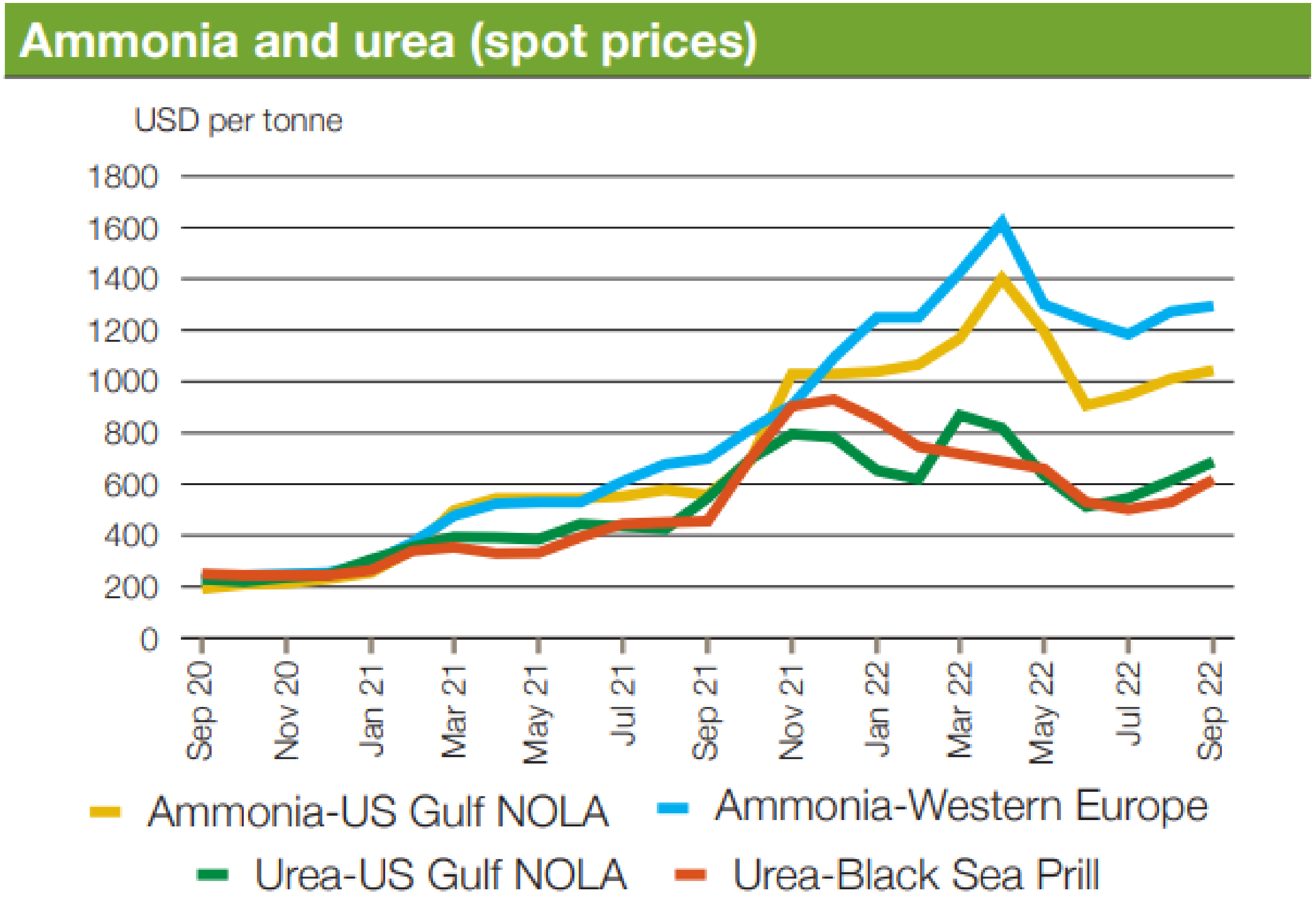
Source: IGC
Latest prices referring to (if not stated otherwise): 12/10/2022

European Commission

World maize and barley prices (USD/t)



Source: IGC
Latest prices referring to (if not stated otherwise): 12/10/2022



Source: AMIS - Market Monitor

- EU Cereals (2022/23)

EU27 2022/2023 Area

(million ha)

	2021/22	2022/23		
		August Projection	Sept. Projection	vs. 2021/22 (%)
Soft wheat	*21.7*	*21.9*	*22.0*	*1.4*
Durum wheat	*2.2*	*2.1*	*2.2*	*-0.6*
Barley	*10.3*	*10.4*	*10.5*	*1.6*
Maize	*9.2*	*9.0*	*8.7*	*-5.9*
Rye	*1.9*	*1.8*	*1.8*	*-6.6*
Oats	*2.6*	*2.5*	*2.4*	*-5.7*
Total	**52.0**	51.2	51.3	-1.4

Source: DG AGRI - E4

EU27 2022/2023 Production

(million tonnes)

	2021/22	2022/23		
		August Projection	Sept. Projection	vs. 2021/22 (%)
Soft wheat	*130.1*	*126.0*	*127.0*	*-2.4*
Durum wheat	*7.7*	*7.1*	*7.4*	*-4.9*
Barley	*52.0*	*50.4*	*51.5*	*-1.0*
Maize	*72.7*	*59.3*	*55.5*	*-23.7*
Rye	*7.8*	*7.4*	*7.5*	*-4.0*
Oats	*7.5*	*7.6*	*7.6*	*1.9*
Total	**293.8**	**272.7**	**270.9**	**-7.8**

Source: DG AGRI - E4

European Commission

EU 2022/2023 Usable Production: comparison with other forecasters

(million tonnes)

	EC DG AGRI 30-September	Stratégie Grains 15-September	COCERAL 16-September	COPA COGECA 09-September
Soft Wheat	*127.0*	*124.1*	*125.6*	*125.7*
Durum Wheat	*7.4*	*7.0*	*7.2*	*7.4*
Barley	*51.5*	*51.0*	*52.4*	*51.1*
Maize	*55.5*	*52.9*	*51.9*	*55.0*
Rye	*7.5*	*7.6*	*7.8*	*8.0*
Total Cereals	**270.9**	**264.6**	**264.6**	**269.1**

2022/2023 – Production evolution

	month/month variation	year/year variation	vs. 5-year average
France	0.1%	-8.8%	-6.9%
Germany	0.7%	2.0%	-0.3%
Poland	12.1%	3.6%	12.5%
Romania	-11.1%	-31.0%	-29.6%
Spain	-1.8%	-19.2%	-13.0%
Italy	6.2%	-8.6%	-8.1%
Denmark	7.1%	16.4%	9.4%

**: 75% of the EU production*

Source: DG AGRI - E4

European Commission

EU 2022/2023 Cereals Balance Sheet

(thousand metric tonnes)

LAST UPDATED: 30/09/2022

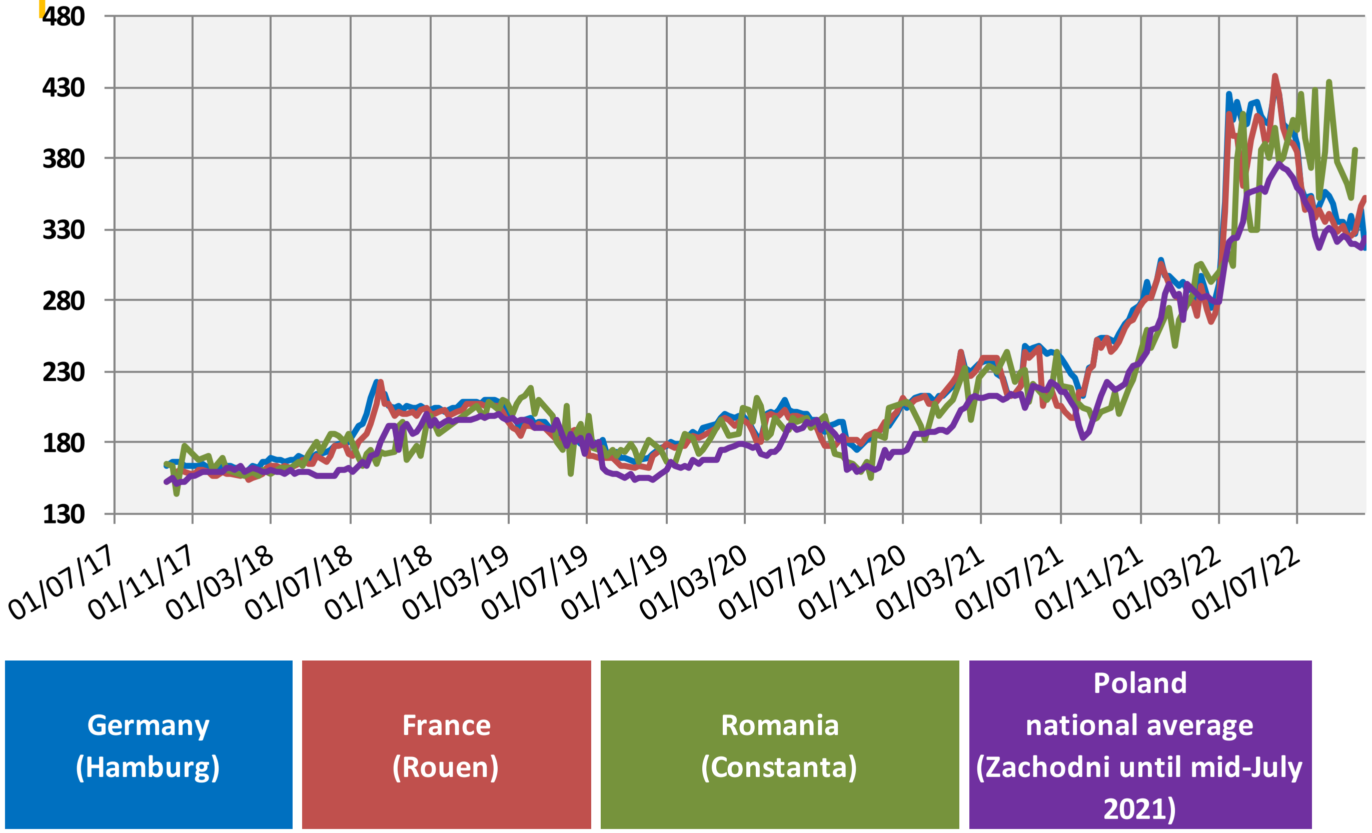
	2022/23 proj.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**16 565**	**4 541**	**1 011**	**19 964**	**1 294**	**1 103**	**1 357**	**2 095**	**350**	**48 281**
Usable production	127 043	51 464	7 359	55 509	7 454	582	7 607	11 285	2 603	270 905
Area (thousand ha)	*22 034*	*10 470*	*2 193*	*8 692*	*1 788*	*141*	*2 414*	*2 601*	*968*	*51 302*
Yield (tonnes/ha)	*6*	*5*	*3*	*6*	*4*	*4*	*3*	*4*	*3*	*5*
Imports (from third countries)	2 500	1 200	2 500	21 000	137	220	71	2	164	27 793
Total supply	**146 108**	**57 204**	**10 870**	**96 473**	**8 885**	**1 906**	**9 035**	**13 382**	**3 117**	**346 980**
Total domestic use	95 578	42 503	9 157	77 360	7 471	1 106	7 417	11 565	3 844	256 002
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	11 400	1 500		101	445	170	29 210
of which bioethanol/biofuel	*2 800*	*437*		*6 300*	*900*			*344*	*14*	*10 795*
Animal feed	40 000	33 000	500	60 500	2 652	918	5 814	10 500	3 366	157 250
Losses	762	309	44	333	45	3	46	68	16	1 625
Exports (to third countries)	36 000	9 959	1 148	3 500	189	16	189	5	20	51 025
Total use	**131 578**	**52 462**	**10 305**	**80 860**	**7 660**	**1 122**	**7 605**	**11 569**	**3 864**	**307 026**
Ending stocks**	**14 530**	**4 742**	**565**	**15 613**	**1 225**	**784**	**1 429**	**1 813**	**-747**	**39 953**
Change in stocks**	-2 035	202	-446	-4 352	-69	-320	72	-282	-1 098	-8 328

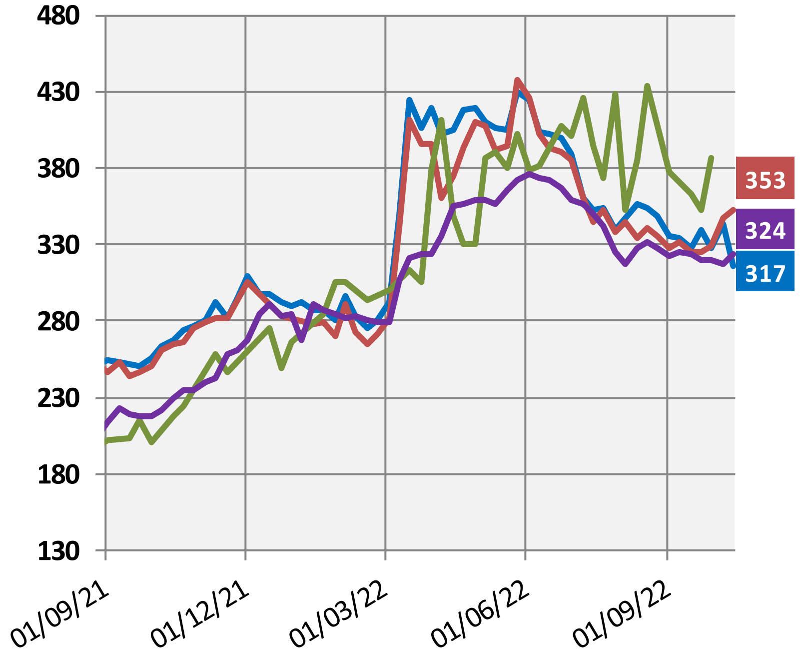
* Marketing year: from July to June

** At the end of the marketing year

- EU Cereals (prices)

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



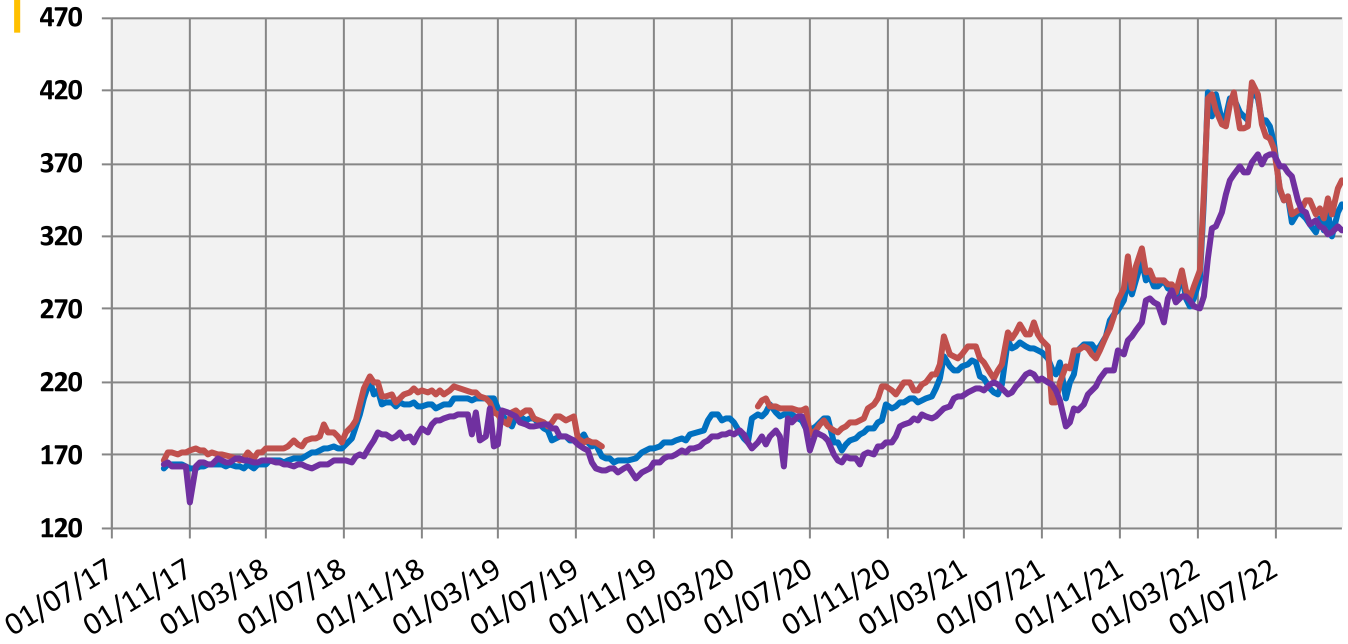


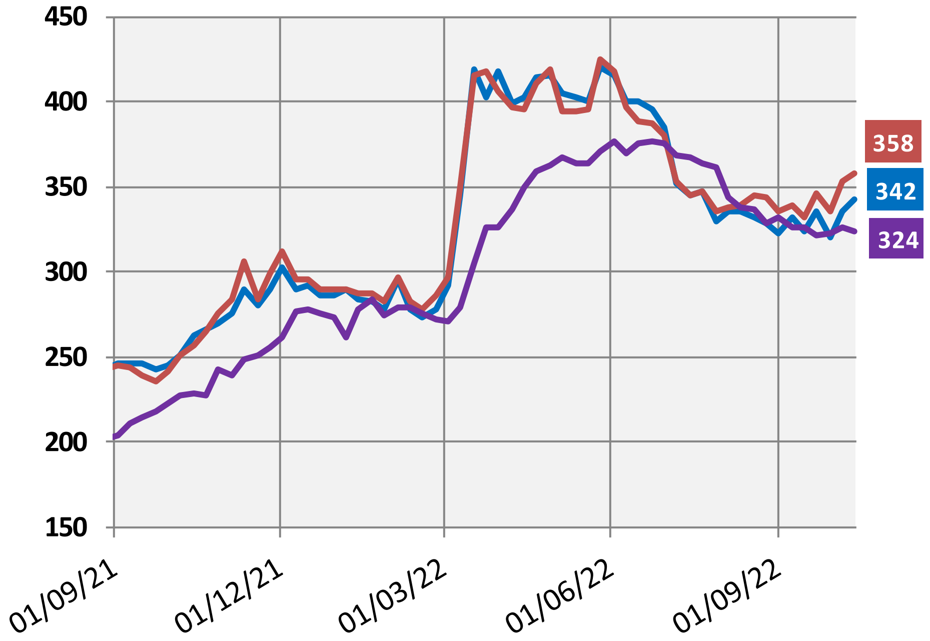
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

France (DELPORT Rouen)

- EUR 353 per tonne; +8.6% month-on-month; +33.2% year-on-year

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





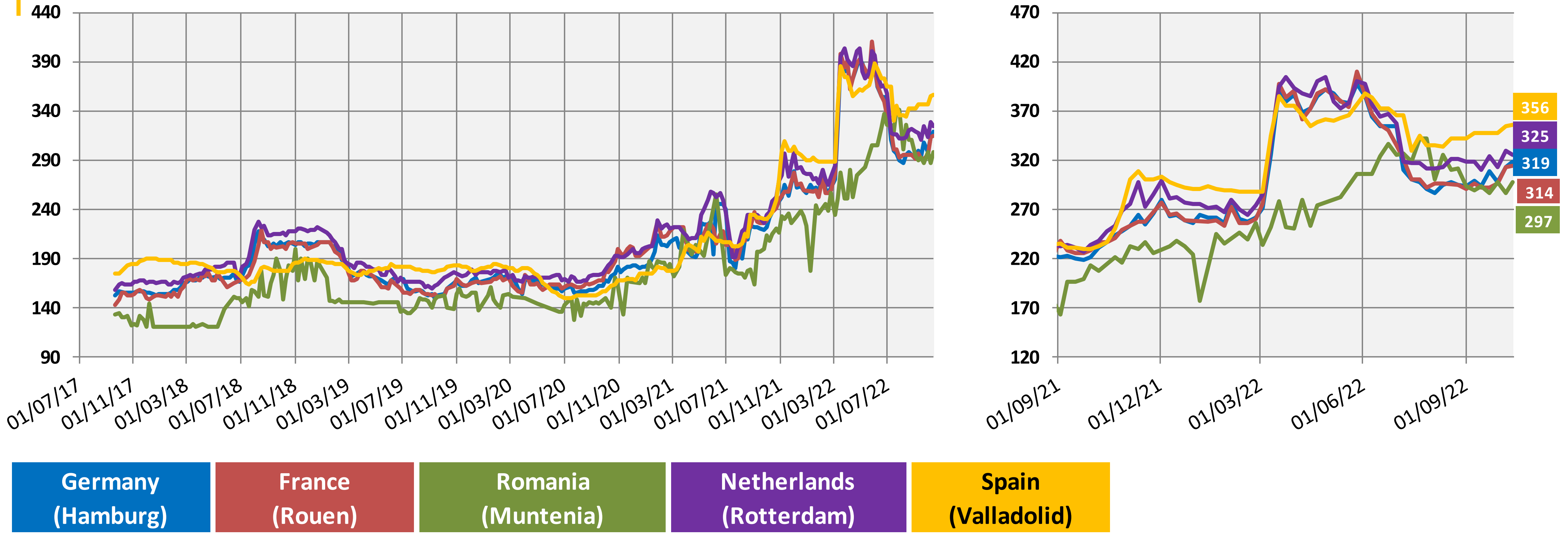
Germany (Hamburg)	Netherlands (Rotterdam)	Poland national average (Zachodni until mid-July 2021)

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

Germany (DEPSILO Hamburg)

- EUR 342 per tonne; +5.6% month-on-month; +30.5% year-on-year

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

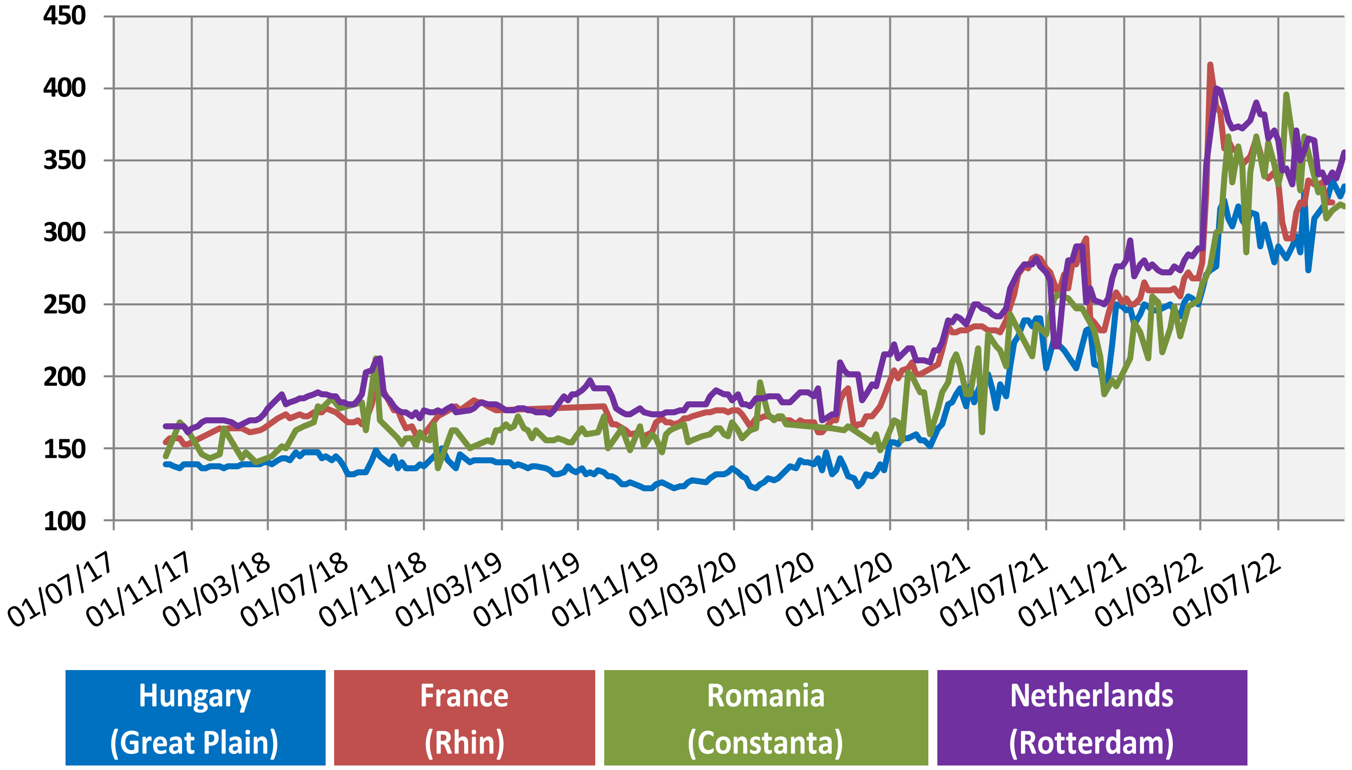


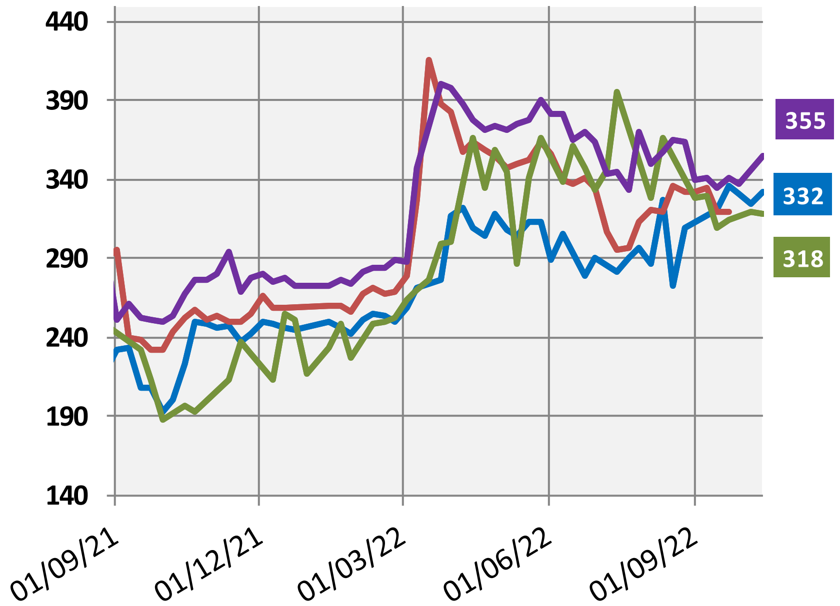
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

France
(DELPORT Rouen)

- EUR 314 per tonne; +7.9% month-on-month; +32.5% year-on-year

EU market prices for maize – (EUR per tonne)



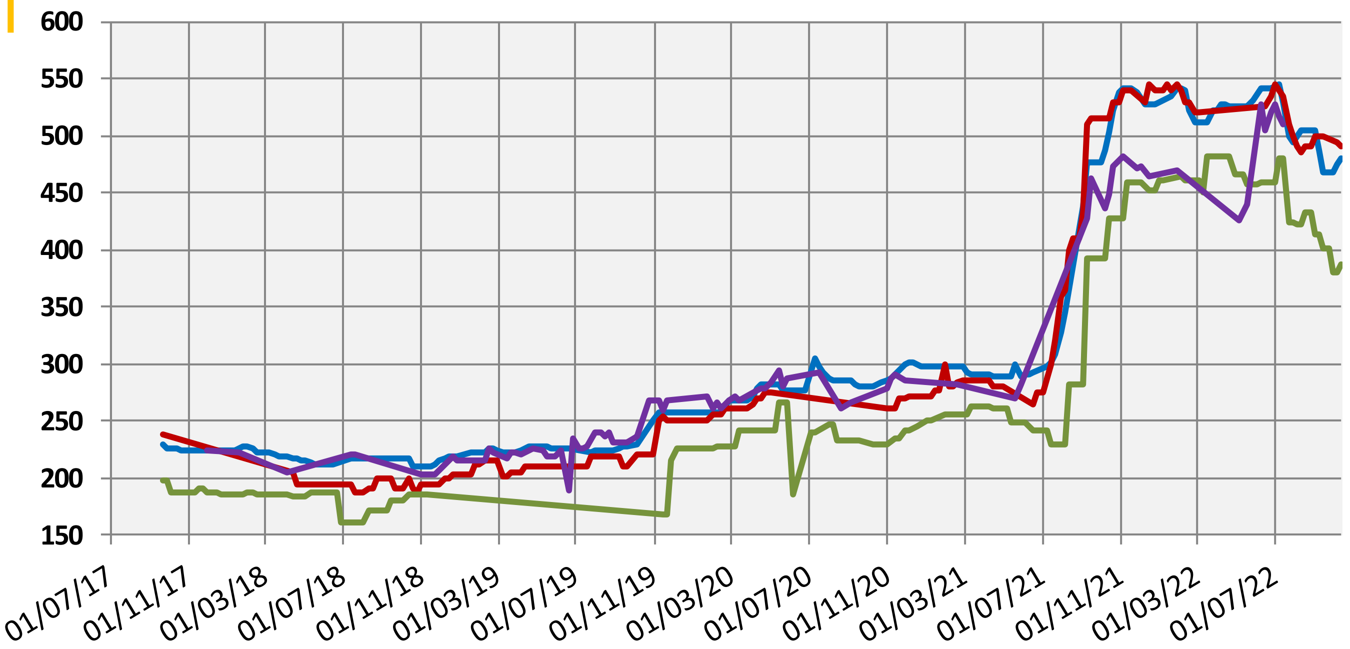


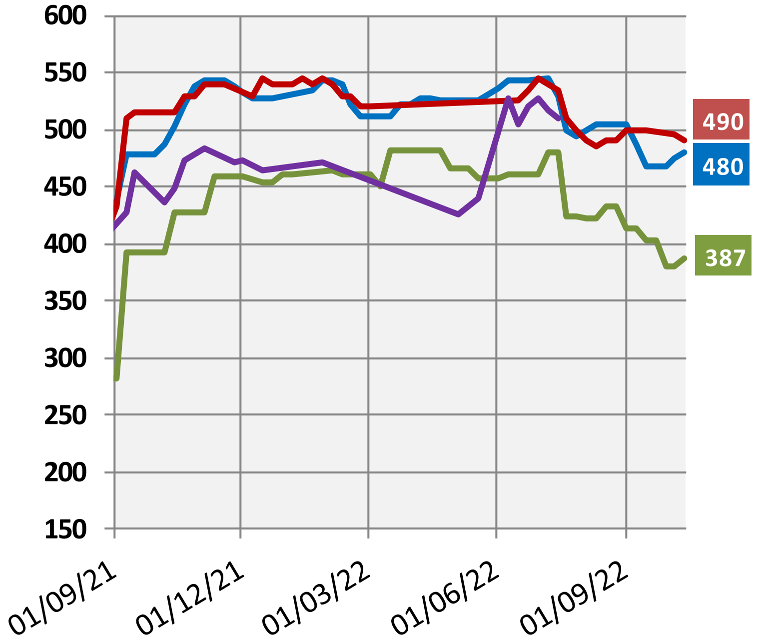
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

Hungary
(FGATE Great Plain)

- EUR 332 per tonne; +3.8% month-on-month; +48.9% 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 480 per tonne; +2.6% month-on-month; -4.6% year-on-year

Questions:

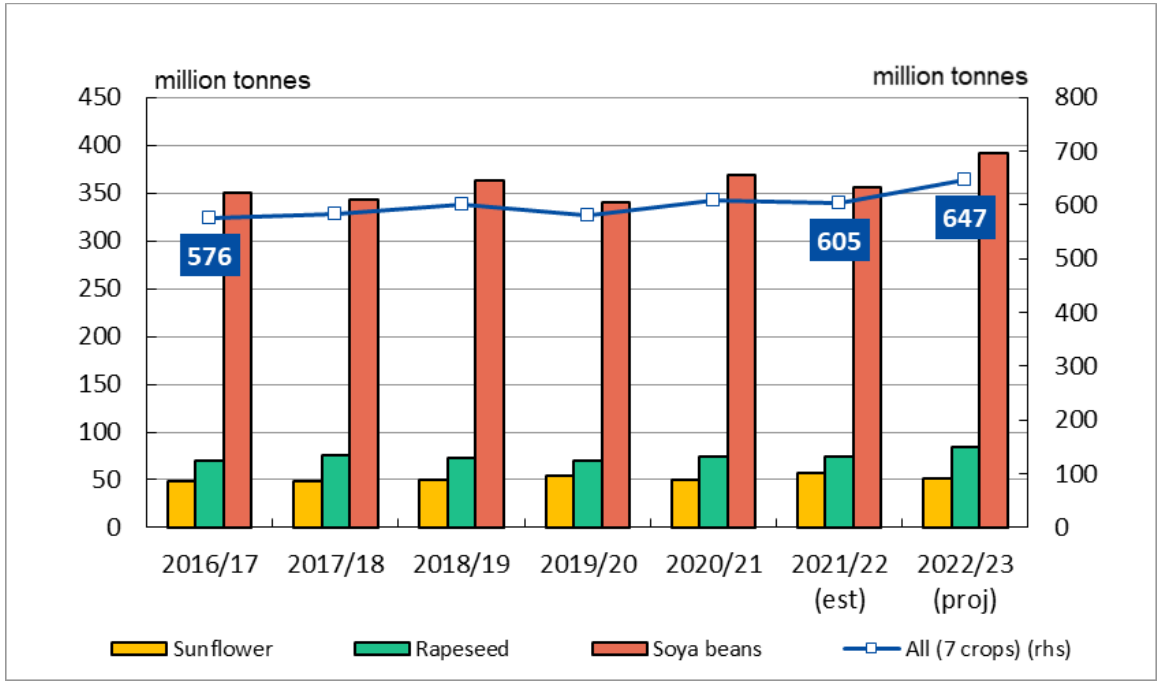
- Your views on grains feed use and shift between different raw materials
- Biofuel use - impact of lower domestic maize availabilities
- EU wheat exports prospects

European Commission

Oilseeds

- World Oilseeds market & prices

2022/23 World Oilseeds (USDA)

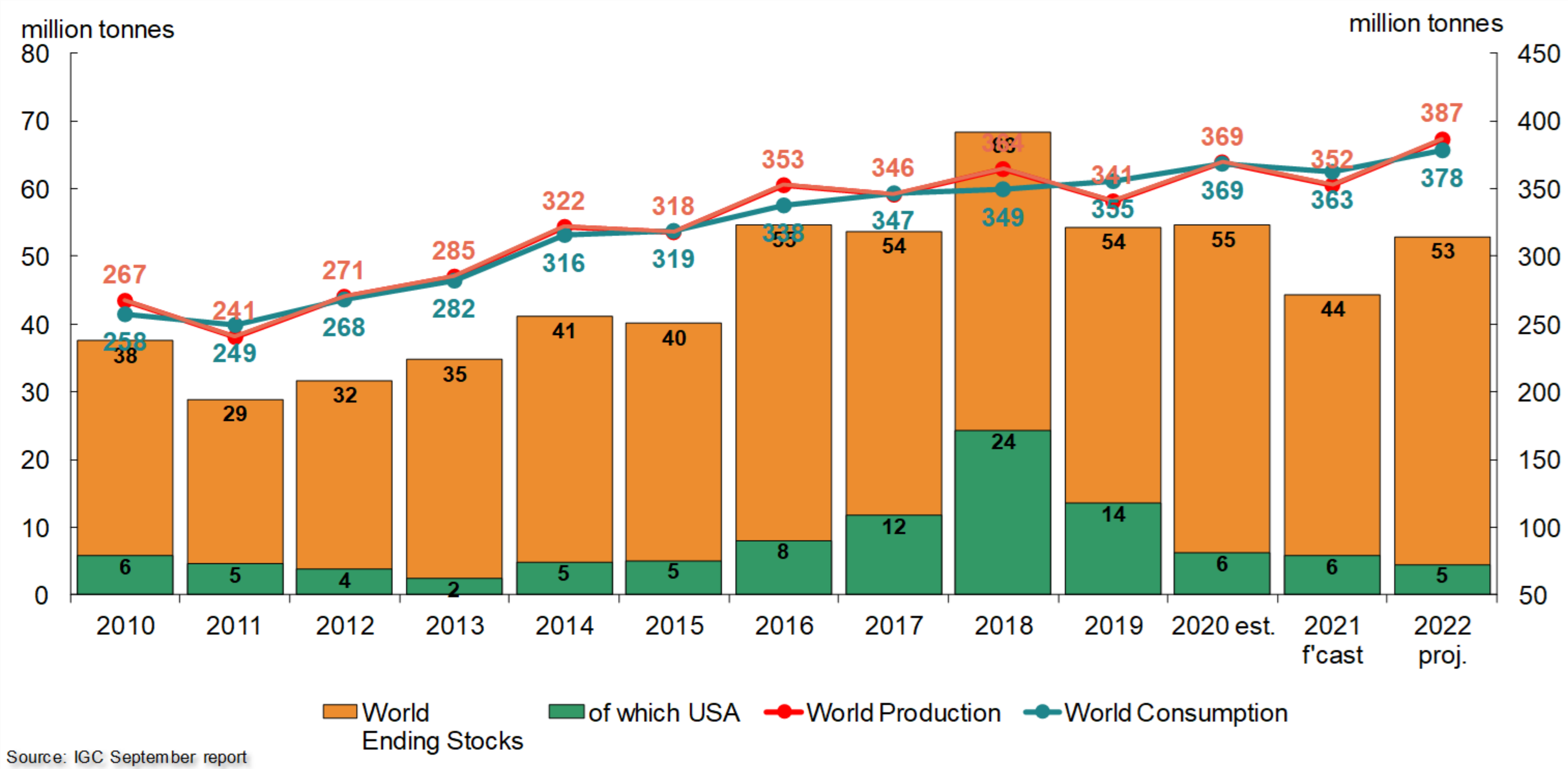


22/23 outlook (changes y/y):

Total Oilseeds: **647 mt** (+42)

- Soya beans: 391 mt
- Rapeseed: 84 mt
- Sunflower: 52 mt

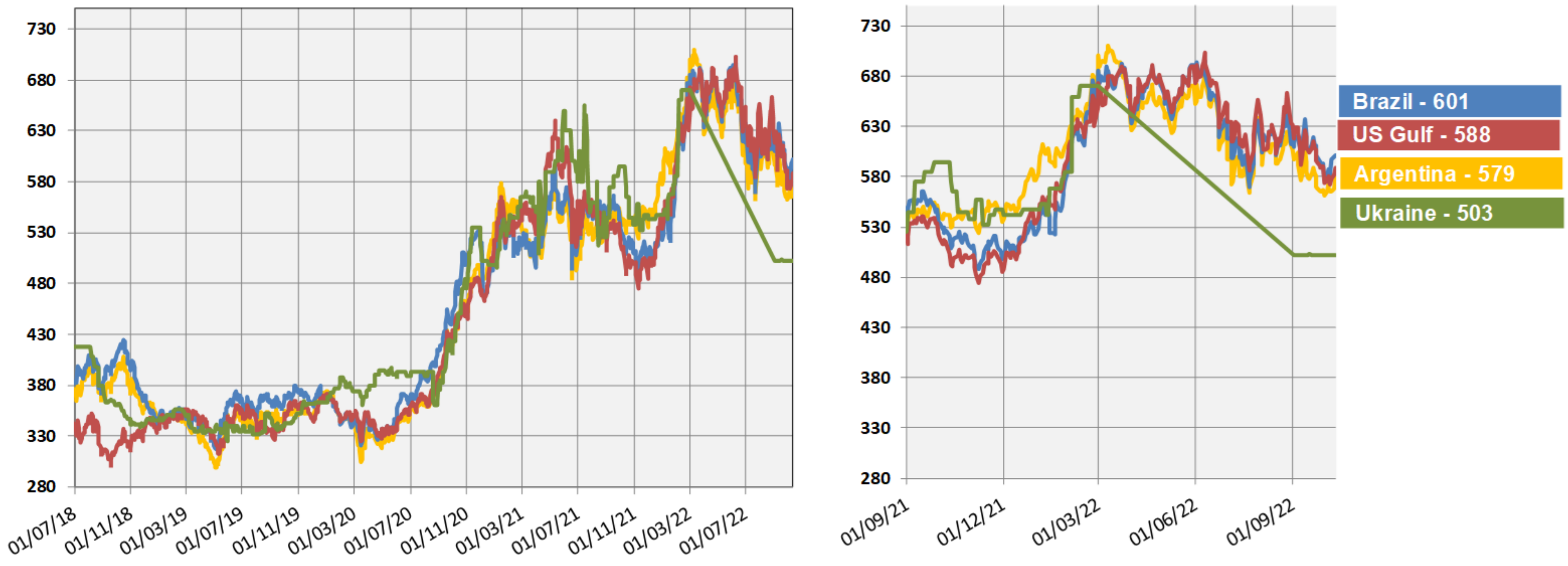
World soya: IGC



Source: IGC September report

European Commission

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

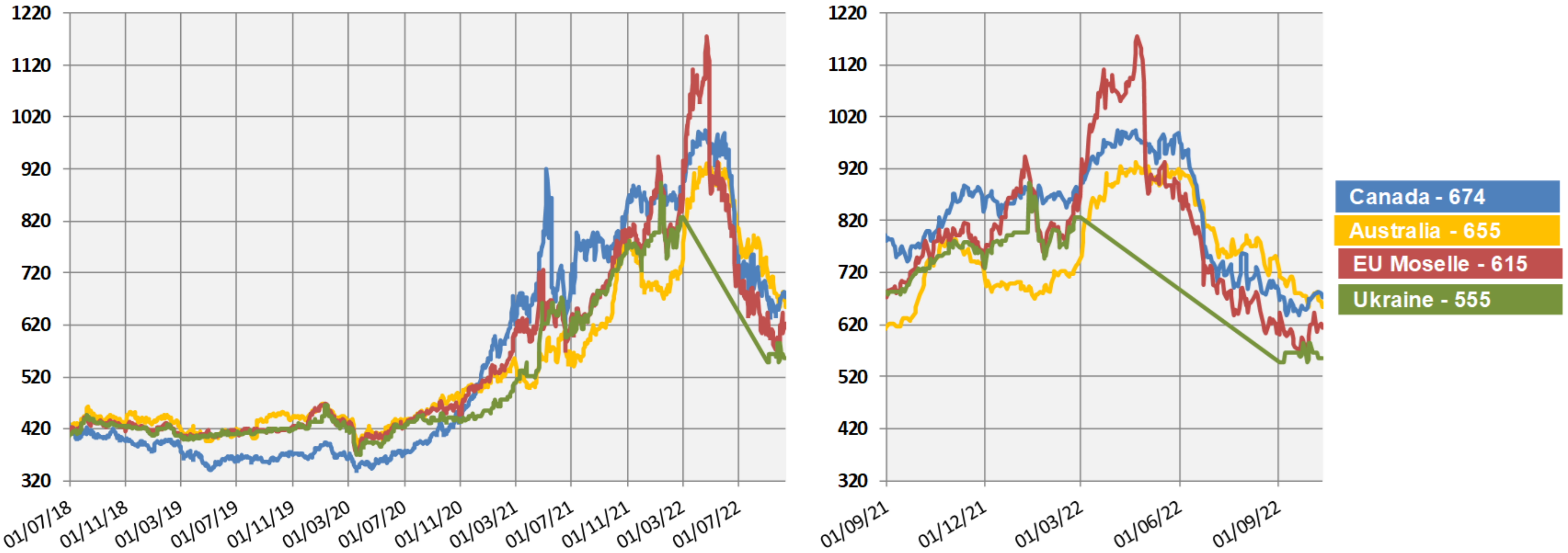


Source: International Grains Council

Latest prices referring to: 11/10/2022

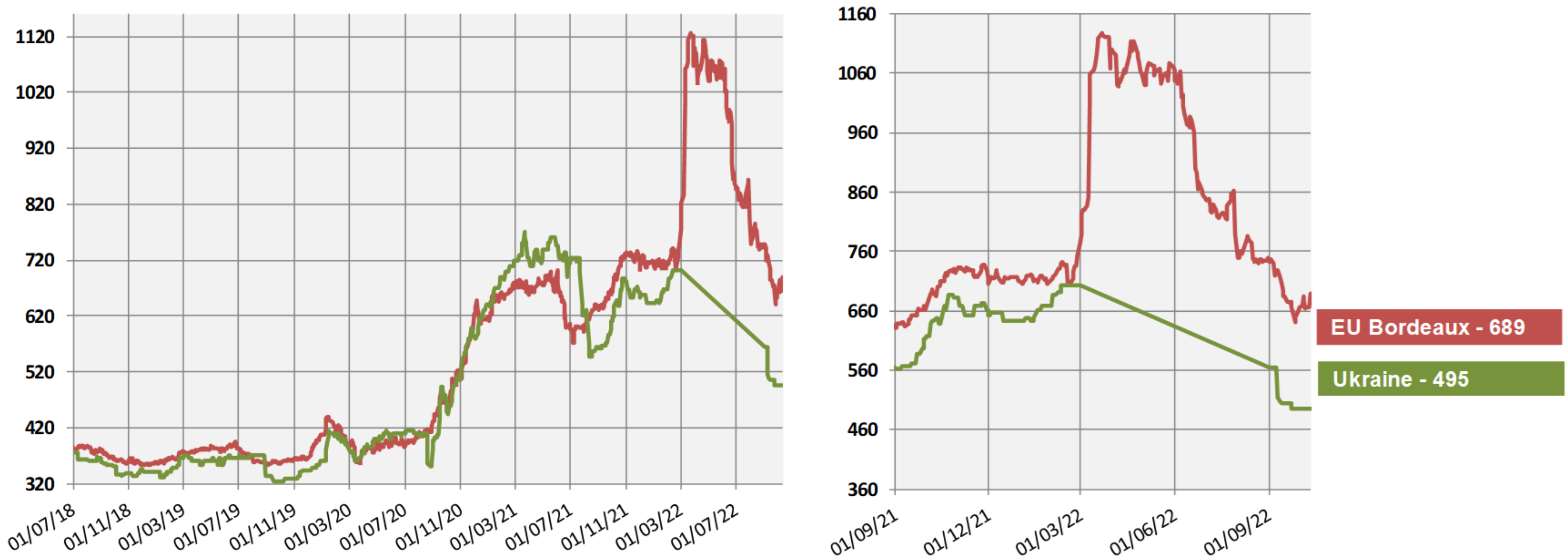
European Commission

World export prices for rapeseed – (USD/tonne)



Source: International Grains Council
Latest prices referring to: 12/10/2022

World export prices for sunflower – (USD/tonne)



Source: International Grains Council
Latest prices referring to: 12/10/2022

World export prices for soya beans and rapeseed (USD/tonne)

fob, US$/t	12 October 2022	%change -1yr	%change compared to pre-war level
Soya bean			
Argentina	579	7%	-13%
Brazil	601	15%	-9%
US Gulf	588	17%	-9%
Ukraine	503	-13%	-25%

Source: IGC

fob, US$/t	12 October 2022	%change -1yr	%change compared to pre-war level
Rapeseed			
Australia	655	-13%	-10%
Canada	674	-16%	-23%
EU France Moselle	**615**	**-17%**	**-27%**
Ukraine	555	-26%	-32%

Source: IGC

- EU Oilseeds (2022/23)

EU oilseeds 2022/23 projections

EU OILSEEDS AREA

(million hectares)

	5-year trimmed average	2021/22	2022/23 September	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Rapeseed	*5.61*	*5.33*	*5.94*	*11.5*	*5.8*
Sunflower	*4.33*	*4.35*	*5.10*	*17.4*	*17.8*
Soya Beans	*0.95*	*0.94*	*1.12*	*18.8*	*18.1*
TOTAL	**10.89**	**10.61**	**12.15**	**14.6**	**11.6**

EU OILSEEDS PRODUCTION

(million tonnes)

	5-year trimmed average	2021/22	2022/23 September	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Rapeseed	*17.23*	*17.00*	*19.28*	*13.4*	*11.9*
Sunflower	*10.18*	*10.34*	*10.27*	*-0.7*	*0.8*
Soya Beans	*2.69*	*2.66*	*2.70*	*1.5*	*0.2*
TOTAL	**30.11**	**29.99**	**32.24**	**7.5**	**7.1**

Sources : EC - DG AGRI.

EU protein crops 2022/23 projections

EU PROTEIN CROPS AREA

(million hectares)

	5-year trimmed average	2021/22	2022/23 September	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Field peas	*0.81*	*0.77*	*0.77*	*-0.2*	*-5.1*
Broad beans	*0.46*	*0.47*	*0.44*	*-6.6*	*-5.0*
Sweet lupins	*0.18*	*0.21*	*0.21*	*4.6*	*18.3*
TOTAL	**1.46**	**1.45**	**1.42**	**-1.6**	**-2.7**

EU PROTEIN CROPS PRODUCTION

(million tonnes)

	5-year trimmed average	2021/22	2022/23 September	2022/23 vs. 2021/22 (%)	2022/23 vs. 5-y AVG (%)
Field peas	*1.97*	*1.83*	*2.09*	*14.60*	*6.50*
Broad beans	*1.14*	*1.12*	*1.14*	*1.80*	*0.40*
Sweet lupins	*0.27*	*0.32*	*0.28*	*-14.60*	*3.20*
TOTAL	**3.37**	**3.27**	**3.51**	**7.3**	**4.0**

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)*

	2021/22 fc.				2022/23 proj.			
last updated: 30/09/2022	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	19 278	2 696	10 266	32 240
Area (thousand ha)	5 325	940	4 345	10 611	5 936	1 117	5 102	12 155
Yield (tonnes/ha)	3.19	2.82	2.38	2.83	3.25	2.41	2.01	2.65
Imports (from third countries)	5 570	14 504	1 148	21 222	4 500	14 000	800	19 300
Total supply	**23 066**	**18 259**	**12 183**	**53 508**	**24 278**	**17 896**	**11 933**	**54 107**
Domestic use	22 142	16 788	10 918	49 847	23 464	16 454	10 761	50 680
of which crushing	*(21 370)*	*(14 806)*	*(9 660)*	*(45 836)*	*(22 641)*	*(14 499)*	*(9 534)*	*(46 674)*
Exports (to third countries)	425	271	398	1 094	314	241	305	861
Total use	**22 566**	**17 059**	**11 316**	**50 941**	**23 778**	**16 696**	**11 066**	**51 540**
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: 30/09/2022	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	12 181	11 697	5 313	29 191	12 905	11 455	5 244	29 604
Imports (from third countries)	575	16 780	2 389	19 744	400	16 000	2 100	18 500
Total supply	12 806	28 819	7 802	49 427	13 355	27 796	7 444	48 595
Domestic use	12 053	27 710	6 790	46 553	12 688	26 698	6 751	46 137
Exports (to third countries)	703	767	912	2 382	617	756	592	1 966
Total use	12 756	28 477	7 702	48 935	13 305	27 454	7 344	48 103
Ending stocks	50	342	100	492	50	342	100	492
Change in stocks	-	-1	-	-1	-	1	-	1

Sources : EC – DG AGRI

European Commission

Vegetable oils balance sheet (EU)

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

last updated: 30/09/2022	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	8 762	2 961	4 057	0	15 780	9 283	2 900	4 004	0	16 187
Imports (from third countries)	592	519	2 044	5 440	8 595	425	250	2 000	4 024	6 699
Total supply	9 946	3 655	6 372	5 928	25 900	10 299	3 325	6 275	4 511	24 410
Domestic use	9 017	2 472	5 330	5 270	22 089	9 364	2 350	5 305	3 817	20 836
Exports (to third countries)	337	1 008	771	171	2 287	344	800	700	205	2 049
Total use	9 354	3 480	6 101	5 441	24 376	9 708	3 150	6 005	4 023	22 885
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

Protein crops

Protein crops balance sheet (EU)

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

last updated 30/09/2022	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	1 923	1 136	290	175	113	685	4 323	4 264	1.4%
Imports	514	102	197	135	208	380	1 536	1 610	-4.6%
Total supply	**2 437**	**1 238**	**487**	**310**	**321**	**1 065**	**5 859**	**5 874**	**-0.3%**
Domestic use	2 212	942	487	288	315	1 040	5 283	5 367	-1.6%
- Food	*(761)*	*(125)*	*(5)*	*(288)*	*(315)*	*(517)*	*(2 010)*	*(2 051)*	*-2.0%*
- Feed	*(1 451)*	*(817)*	*(482)*	*(0)*	*(0)*	*(523)*	*(3 274)*	*(3 316)*	*-1.3%*
Exports	225	296	0	23	6	25	576	507	13.5%
Total Use	**2 437**	**1 238**	**487**	**310**	**321**	**1 065**	**5 859**	**5 874**	**-0.3%**
Ending stocks	-	-	-	-	-	-	-	-	-

sources: EC - DG AGRI

Questions:

- How the increased Ukrainian sunflower seeds imports are managed by the local crushing industry?
- We observe, for the moment, very dynamic rapeseed imports, will this pace continue?
- EU rapeseed production was very high, where is the demand for additional imports coming from?

Thank you

European Commission