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## **EU-27**

**Post:** Vienna

### **2012 Sunflower Crop Hit by Hot and Dry Weather**

**Report Categories:**

Oilseeds and Products

Biofuels

Grain and Feed

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**Report Highlights:**

**This report provides EU-27 production, supply, and demand forecasts for oilseeds, protein meals and related products.**

## Introduction

This report presents the outlook for oilseeds in the EU-27. The data in this report is based on the views of Foreign Agricultural Service (FAS) analysts in the EU and is not official USDA data.

This report was a group effort of the following FAS analysts:

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The FAS EU-27 oilseeds reporting team would like to thank Yoonhee Macke from FAS/OGA for her valuable input and support.

## Abbreviations used in this report

Benelux	= Belgium, the Netherlands, and Luxembourg
CAP	= EU common agricultural policy
CY	= Calendar year
e	= Estimate (of a value/number for the current, not yet completed, marketing year)
EU-27	= European Union of 27 Member states (Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, France, Finland, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom)
FSU	= Former Soviet Union
f	= Forecast (of a value/number for the next, not yet started, marketing year)
Ha	= Hectares
GE	= Genetically engineered / Genetically engineered organisms
GHG	= Greenhouse gas
GTA	= Global Trade Atlas
MT	= Metric ton (1000 kg)
MMT	= Million metric tons
MS	= EU Member State(s)
MY	= Marketing year
NUTS2	= Nomenclature of Units for Territorial Statistics level 2 = code for regions within a country
SME	= Soybean meal equivalent
U.K.	= United Kingdom
U.A.E.	= United Arab Emirates
U.S.	= The United States of America

In this report "**biofuel**" includes only biofuels used in the transport sector. Biomass/biofuel used for electricity production or other technical uses such as lubricants or in detergents are included in "**industrial use**".

The marketing years used in this report are:

January-December  
Palm Oil

July-June  
Rapeseed complex

October -September  
Soybean complex  
Sunflower complex

November-October  
Olive Oil

### **Table of Contents**

1. [Executive Summary](#)
2. [Total of Major Oilseeds](#)
3. [Soybean Complex](#)
4. [Rapeseed Complex](#)
5. [Sunflower Complex](#)
6. [Palm Oil](#)
7. [Olive Oil](#)
8. [Related EU-27 and Country Reports](#)

### **1. Executive Summary:**

Coordinator: Roswitha Krautgartner / FAS Vienna

### **Production**

In MY 2012/13, overall EU-27 production of major oilseeds (rapeseed, sunflower and soybeans) is expected to reach 26.6 MMT, a decline of 7.1 percent compared to the previous year. Most significant is the lower production of sunflower seed due to a hot and dry summer in Spain, Romania, France, Italy, Hungary and Bulgaria. The current estimate for the EU-27 sunflower crop is at 6.97 MMT which is 16 percent less than in MY 2011/12. The unfavorable hot and dry conditions have also affected soybean production. EU-27 production of soybeans remains very low compared to consumption and is forecast to decline 25 percent to 0.96 MMT. Expectations for rapeseed production in MY 2012/13 are 18.7 MMT, which is a 2 percent decline year-on-year. Rapeseed output varies greatly among Member states. The Czech Republic had a record rapeseed crop whereas drought in the fall and harsh winter in especially Romania, Bulgaria, and Hungary sharply reduced yields. Overall EU-27 production of olives and olive oil in MY 2012/3 is expected to fall by more than 20 percent with even higher production reductions in Spain (- 40 percent). The low olive harvest is due to the natural cyclical fall of production over the years combined with drought and heat.

## Consumption and Trade

Total EU-27 consumption of major oilseed meals (soybean, rapeseed and sunflower) in feed is forecast to decline by 0.9 percent in MY 2012/13. Due to lower domestic supply and less price competitiveness compared to other meals, feed use of sunflower meal is expected to decline by 8.2 percent to 6.4 MMT. Lower availability of rapeseed meal and sunflower meal is expected to increase the demand for soybean meal in animal feed to 29.2 MMT. Increased feed demand for soybean meal and higher than anticipated availability of soybean products on world markets is forecast to result in higher imports of soybean meal in MY 2012/13 to 21.2 million MT. Industrial consumption of soybean oil for biofuels production is expected to rebound in 2012/13 from a low level in 2011/12. Lower availability of rapeseed in the Black Sea region and Australia in MY 2012/13 lead to lower import expectations which, in combination with lower domestic production, results in a smaller crush and a lower rapeseed oil supply. Reduced use of rapeseed and sunflower oil in biofuels production is forecast to be partially offset by increased the use of soybean oil and palm oil. Despite low domestic production, olive oil consumption is expected to be stable. To satisfy the domestic demand for olive oil exports are forecast to decline while imports may grow, mainly from North Africa and Middle Eastern countries.

### 2. Total of Major Oilseeds (Soybean, Rapeseed, Sunflower)

Coordinator: Roswitha Krautgartner / FAS Vienna

#### EU-27 Area of Major Oilseeds (in 1,000 ha)

Area	2010	2011	2012e
Rapeseed	6,986	6,634	6,128
Sunflower	3,718	4,200	4,230
Soybeans	381	452	389
Total	11,085	11,286	10,747

Note: The years refer to the calendar year in which the harvest occurs (e.g. 2010 = harvested in CY 2010, marketed in MY 2010/11)

e = estimate

Source: FAS EU-27

#### EU-27 Major Oilseed Production (in 1,000 MT)

Production	2010	2011	2012e
Rapeseed	20,753	19,077	18,700
Sunflower	6,933	8,290	6,970
Soybeans	1,092	1,289	964
Total	28,778	28,656	26,634

Note: The years refer to the calendar year in which the harvest occurs (e.g. 2010 = harvested in CY 2010, marketed in MY 2010/11)

e = estimate

Source: FAS EU-27

#### EU-27 Major Oilseed Crush (in 1,000 MT)

Crush	MY 2010/11	MY 2011/12e	MY 2012/13f
Rapeseed	22,300	22,000	21,350
Soybeans	12,398	12,000	11,200
Sunflower	6,100	7,100	6,520
Total	40,798	41,100	39,070

e= estimate, f = forecast

Source: FAS EU-27

#### Feed, Waste Use of Major Oil Meals in the EU-27 (in 1,000 MT)

Feed, Waste Use Meals	MY 2010/11	MY 2011/12e	MY 2012/13f
Soybeans	29,987	29,000	29,200
Rapeseed	12,390	12,100	11,900
Sunflower	5,243	6,820	6,400
Total	47,620	47,920	47,500

e= estimate, f = forecast

Source: FAS EU-27

Food Use of Major Oils in the EU-27 (in 1,000 MT)

Food Use, Oils	MY 2010/11	MY 2011/12e	MY 2012/13f
Sunflower Oil	3,230	3,370	3,200
Palm Oil	2,700	2,700	2,700
Rapeseed Oil	2,650	2,500	2,400
Olive Oil	1,734	1,744	1,746
Soybean Oil	1,280	1,300	1,200
Total	11,594	11,614	11,246

e= estimate, f = forecast

Source: FAS EU-27

Biofuels Use of Major Oils in the EU27 (in 1,000 MT):

Biofuels	MY 2010/11	MY 2011/12e	MY 2012/13f
Feedstock/Rape Oil	6,471	6,450	6,200
Feedstock/Soy Oil	1,080	660	800
Feedstock/Sun Oil	140	215	200
Feedstock/Palm Oil	650	700	750
Total	8,341	8,025	7,950

e= estimate, f = forecast

Source: FAS EU-27

Other Industrial Use of Major Oils in the EU27 (in 1,000 MT):

Other Industrial Use	MY 2010/11	MY 2011/12e	MY 2012/13f
Rape Oil	552	600	580
Soy Oil	200	200	200
Sunflower Oil	80	80	70
Palm Oil	1,500	1,550	1,600
Total	2,332	2,430	2,450

e= estimate, f = forecast

Source: FAS EU-27

### 3. Soybean Complex

Coordinator: Marie-Cecile Henard / FAS Paris

EU-27 Oilseeds December 2012 Update

Oilseed, Soybean EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: May 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	375	381	425	452	425	389
Area Harvested	380	381	451	452	400	389
Beginning Stocks	543	543	603	282	431	113
Production	1,090	1,092	1,288	1,289	1,100	964
MY Imports	12,482	12,483	11,300	11,900	11,000	11,600
MY Imp. from U.S.	3,174	0	1,250	0	3,000	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	14,115	14,118	13,191	13,471	12,531	12,677
MY Exports	56	56	40	38	30	40
MY Exp. to EU	0	0	0	0	0	0
Crush	12,265	12,398	11,770	12,000	11,350	11,200
Food Use Dom. Cons.	117	145	120	140	120	140
Feed Waste Dom. Cons.	1,074	1,237	830	1,180	780	1,180
Total Dom. Cons.	13,456	1,780	12,720	13,320	12,250	12,520
Ending Stocks	603	282	431	113	251	117
Total Distribution	14,115	14,118	13,191	13,471	12,531	12,677
1000 HA, 1000 MT						

Meal, Soybean EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: May 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	12,265	12,398	11,770	12,000	11,350	11,200
Extr. Rate, 999.9999	1	1	1	1	1	1
Beginning Stocks	495	495	552	1,217	317	1,625
Production	9,675	9,712	9,274	9,400	8,945	8,800
MY Imports	21,710	21,635	21,200	21,000	21,900	21,200
MY Imp. from U.S.	453		100		0	
MY Imp. from EU	0		0		0	
Total Supply	31,880	31,842	31,026	31,617	31,162	31,625
MY Exports	606	596	880	950	550	950
MY Exp. to EU	0		0		0	
Industrial Dom. Cons.	10	10	10	10	10	10
Food Use Dom. Cons.	32	32	32	32	32	32
Feed Waste Dom. Cons.	30,680	29,987	29,787	29,000	30,356	29,200
Total Dom. Cons.	30,722	30,029	29,829	29,042	30,398	29,242
Ending Stocks	552	1,217	317	1,625	214	1,433
Total Distribution	31,880	31,842	31,026	31,617	31,162	31,625
1000 MT, PERCENT						

Oil, Soybean EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: Oct 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	12,265	12,398	11,770	12,000	11,350	11,200

<b>Extr. Rate, 999.9999</b>	0	0	0	0	0	0
<b>Beginning Stocks</b>	322	322	272	464	172	294
<b>Production</b>	2,236	2,303	2,150	2,260	2,074	2,080
<b>MY Imports</b>	907	905	450	380	500	600
<b>MY Imp. from U.S.</b>	1		1		1	
<b>MY Imp. from EU</b>	0		0		0	
<b>Total Supply</b>	3,465	3,530	2,872	3,104	2,746	2,974
<b>MY Exports</b>	456	456	680	600	470	500
<b>MY Exp. to EU</b>	0		0		0	
<b>Industrial Dom. Cons.</b>	1,420	1,280	910	860	1,010	1,000
<b>Food Use Dom. Cons.</b>	1,227	1,280	1,050	1,300	1,030	1,200
<b>Feed Waste Dom. Cons.</b>	90	50	60	50	60	20
<b>-</b>			0		0	
<b>Total Dom. Cons.</b>	2,737	2,610	2,020	2,210	2,100	2,220
<b>Ending Stocks</b>	272	464	172	294	176	54
<b>Total Distribution</b>	3,465	3,530	2,872	3,104	2,746	2,774
1000 MT, PERCENT						

**MY 2012/13:**

EU-27 soybean production was revised down to 964,000 MT, reflecting a decline in all major producing Member states, where yields were negatively impacted by adverse weather conditions (for example, lack of precipitation and prolonged period with high temperatures in Romania). As a consequence of lower production than the USDA official estimate, imports were estimated at higher levels than the USDA estimate, at 11.6 MMT.

The demand for soybean meal in animal feed is estimated to increase to 29.2 MMT, favored by the lower availability of domestically-produced rapeseed meal and sunflowerseed meal, by the higher-than-anticipated availability of soybean products on world markets, and more attractive crush margins for soybeans than for other seeds in the first months of the MY.

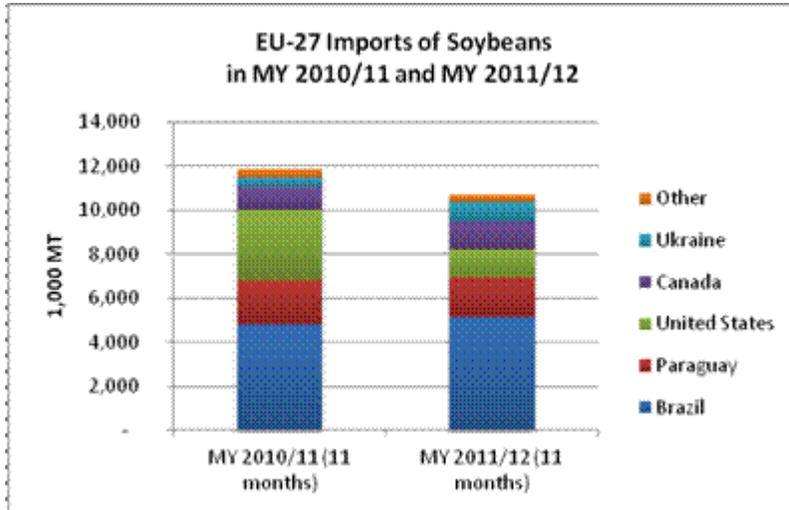
Increased feed demand for soybean meal is expected to result in higher imports of soybean meal to 21.2 million MT.

The main change in soybean oil consumption from MY 2011/12 resides in industrial use, which is expected to bounce back from the abnormally low level in the previous year.

**MY 2011/12:**

In MY 2011/12, EU-27 production amounted to 1.29 MMT. Italy remained the leading producer, with 62 percent, followed by Romania (11 percent), France (10 percent) and Austria (8 percent).

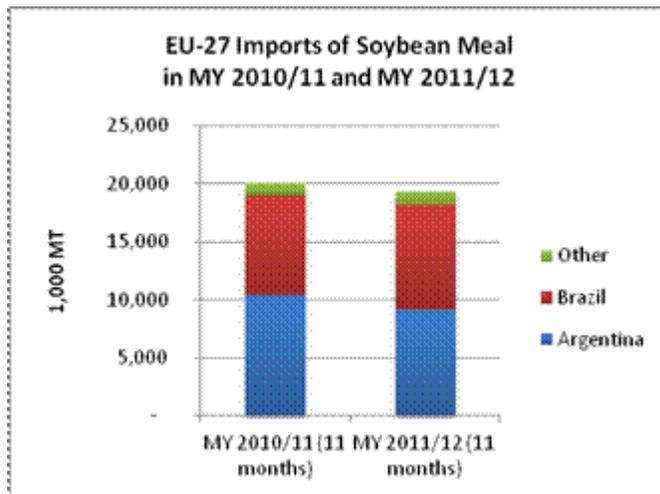
EU-27 domestic production remained marginal compared to imports, estimated at 11.9 MMT, based on the most recent trade data available (August 2012), which allow the calculation of the first 11 months of MY 2011/12. The graph below illustrates the decline in total EU-27 imports of soybeans from MY 2010/11 to MY 2011/12, mainly due to the collapse in shipments from the United States from 3.2 MMT to 1.3 million MT. This decline is attributed to the implementation of the Renewable Energy Directive, which imposes stricter conditions on biofuel sources.



The reduction in total soybean imports in full year MY 2011/12 is estimated at 5 percent from MY 2010/11, resulting from reduced crush demand by 3 percent. Most of the decline in soybean crush is estimated to come from the Benelux and Italy.

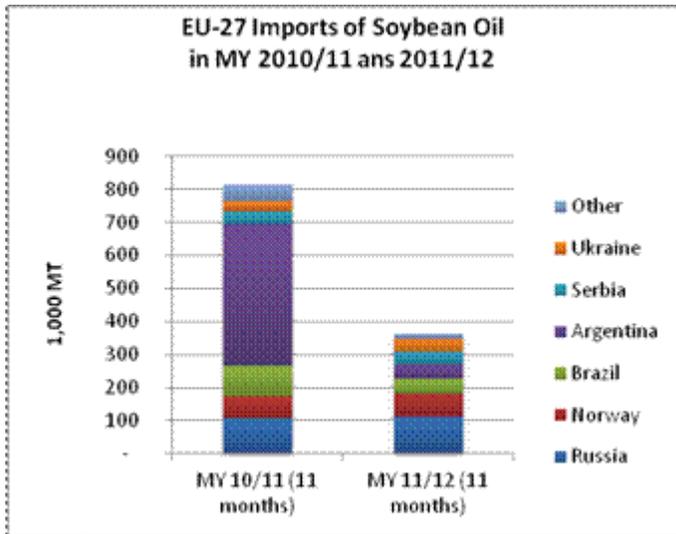
Reduced crush demand comes from reduced animal feed demand for soybean meal (mainly from the swine industry), estimated at 3 percent, to 29 MMT in MY 2011/12. EU-27 imports of soybean meal were also impacted by the lower demand for feed. Based on the most recent trade data available, EU-27 imports of soybean meal are estimated to have declined by almost 3 percent to 21 million MT in MY 2011/12.

The graph below illustrates that the decline in imports of soybean meal in MY 11/12 resulted mainly from lower shipments from Argentina (12 percent less), hampered by lower soybean supply than average in this country, and despite higher shipments from Brazil (5 percent more).



In MY 2011/12, the market balance for soybean oil was impacted by the sharp reduction in use for biofuel (almost 40 percent), to 660,000 MT. Most of the reduction came from Spain, France and Italy. Lower demand for soybean oil pressed imports down by 58 percent to 380,000 MT. The graph below indicates a sharp reduction in imports from Argentina, while more limited from Brazil, during the first 11 months of MY 2011/12.

Reduced imports of soybean oil were more than offset by increased imports of biodiesel, mainly from Argentina and Indonesia, which are the EU-27's dominant suppliers.



#### 4. Rapeseed Complex

Coordinator: Leif Erik Rehder / FAS Berlin

Oilseed, Rapeseed EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jul 2010		Market Year Begin: Jul 2011		Market Year Begin: Jul 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	6,900	0	7,000	0	6,900	0
Area Harvested	6,986	6,986	6,637	6,634	6,200	6,128
Beginning Stocks	1,809	1,809	1,785	1,799	1,851	1,601
Production	20,753	20,753	19,072	19,077	18,850	18,700
MY Imports	2,572	2,634	3,578	3,699	3,200	3,200
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	25,134	25,196	24,435	24,575	23,901	23,501
MY Exports	197	197	124	124	100	100
MY Exp. to EU	0	0	0	0	0	0
Crush	22,280	22,300	21,610	22,000	21,800	21,350
Food Use Dom. Cons.	0	0	0	0	0	0
Feed Waste Dom. Cons.	872	900	850	850	800	850
Total Dom. Cons.	23,152	23,200	22,460	22,850	22,600	22,200
Ending Stocks	1,785	1,799	1,851	1,601	1,201	1,201
Total Distribution	25,134	25,196	24,435	24,575	23,901	23,501

1000 HA, 1000 MT

Meal, Rapeseed EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jul 2010		Market Year Begin: Jul 2011		Market Year Begin: Jul 2012	

	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	22,280	22,300	21,610	22,000	21,800	21,350
Extr. Rate, 999.9999	1	1	1	1	1	1
Beginning Stocks	75	300	118	333	130	366
Production	12,827	12,450	12,441	12,200	12,550	11,850
MY Imports	224	224	228	227	200	230
MY Imp. from U.S.	3	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	13,126	12,974	12,787	12,760	12,880	12,446
MY Exports	251	251	294	294	250	260
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0
Food Use Dom. Cons.	0	0	0	0	0	0
Feed Waste Dom. Cons.	12,757	12,390	12,363	12,100	12,503	11,900
Total Dom. Cons.	12,757	12,390	12,363	12,100	12,503	11,900
Ending Stocks	118	333	130	366	127	286
Total Distribution	13,126	12,974	12,787	12,760	12,880	12,446
1000 MT, PERCENT						

Oil, Rapeseed EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jul 2010		Market Year Begin: Jul 2011		Market Year Begin: May 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	22,280	22,300	21,610	22,000	21,800	21,350
Extr. Rate, 999.9999	0	0	0	0	0	0
Beginning Stocks	249	365	124	217	156	150
Production	9,258	9,300	8,980	9,200	9,059	8,900
MY Imports	488	489	580	579	500	500
MY Imp. from U.S.	70	70	15	39	15	40
MY Imp. from EU	0	0	0	0	0	0
Total Supply	9,995	10,154	9,684	9,996	9,715	9,550
MY Exports	214	214	246	246	200	200
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	6,972	7,023	7,000	7,050	6,890	6,780
Food Use Dom. Cons.	2,680	2,650	2,277	2,500	2,420	2,400
Feed Waste Dom. Cons.	5	50	5	50	5	50
Total Dom. Cons.	9,657	9,723	9,282	9,600	9,315	9,230
Ending Stocks	124	217	156	150	200	120
Total Distribution	9,995	10,154	9,684	9,996	9,715	9,550
1000 MT, PERCENT						

**MY 2012/13:**

The European rapeseed harvest in MY 2012/13 has been completed and data from member states show a great variation among member states. Countries like Germany (+25 percent), Sweden (+12 percent), and Czech Republic (+8 percent) had considerable year to year gains. But, data of South East European member states show the devastating effects of this year's dryness and severe winter. Especially Romania (-81 percent), Bulgaria (-50 percent), and Hungary (-43 percent) have much lower production year to year. France's production increased slightly (+1.5 percent), remaining the EU's leading rapeseed producer. Total EU rapeseed production is two percent lower in MY 2012/13 than last season's production. However, in total, the EU-27 rapeseed production is revised slightly upwards due to higher than expected production in France and Poland.

EU rapeseed production by country in 1000 MT

COUNTRY	2011/12	2012/13
---------	---------	---------

France	5349	5428
Germany	3870	4820
United Kingdom	2758	2600
Poland	1862	1883
Czech Republic	1046	1127
Total EU-27	19077	18700

Source: FAS/EU-27 posts

Imports in MY 2012/13 are expected to be over ten percent lower than in the previous season as availability in Australia and the Black sea region is expected to be lower. Crushing of rapeseed in the EU27 will continue to decrease. However, crushing will just decrease slightly as lower imports are partially offset by a reduction of stocks.

Since demand by the European biodiesel industry for rapeseed oil is to decrease in MY 2012/13, industrial consumption is expected to be lower.

**MY 2011/12:**

Trade data for MY 2011/12 were revised upwards due to supply by major extra EU-27 exporters, the Black Sea region and Australia. Because availability was better than expected, crush and ending stocks were also revised upwards.

**Rapeseed Products**

Since the EU-27 rapeseed crush for MY 2012/13 and MY 2011/12 was revised upwards, production for rapeseed meal and rapeseed oil was adjusted accordingly. Because availability of rapeseed meal in the EU was higher than expected, use for feed was also revised upwards.

Official data for biofuel use for rapeseed oil was adjusted in Germany, France, Benelux, Sweden, and Slovak Republic. Therefore, numbers for industrial domestic consumption of rapeseed oil were revised for MY 2012/13, 2011/12, and 2010/11.

**5. Sunflower Complex**

Coordinator: Mila Boshnakova / FAS Sofia

Oilseed, Sunflowerseed EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: May 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	3,900	3,900	3,900	4,200	3,900	4,250
Area Harvested	3,726	3,718	4,243	4,200	4,080	4,230
Beginning Stocks	403	403	334	330	574	522
Production	6,943	6,933	8,280	8,290	6,850	6,970
MY Imports	379	379	260	282	250	330
MY Imp. from U.S.	55	0	40	0	50	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	7,725	7,715	8,874	8,902	7,674	7,822
MY Exports	555	555	550	560	450	400
MY Exp. to EU	0	0	0	0	0	0
Crush	6,114	6,110	6,960	7,100	6,300	6,520
Food Use Dom. Cons.	270	270	290	270	270	230
Feed Waste Dom. Cons.	452	450	500	450	450	400
Total Dom. Cons.	6,836	6,830	7,750	7,820	7,020	7,150
Ending Stocks	334	330	574	522	204	272
Total Distribution	7,725	7,715	8,874	8,902	7,674	7,822
1000 HA, 1000 MT						

Meal, Sunflowerseed EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: May 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	6,114	6,100	6,960	7,100	6,300	6,520
Extr. Rate, 999.9999	1	1	1	1	1	1
Beginning Stocks	223	223	296	296	615	528
Production	3,335	3,200	3,779	3,690	3,421	3,400
MY Imports	2,254	2,253	3,700	3,826	2,700	2,900
MY Imp. from U.S.	6	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	5,812	5,676	7,775	7,812	6,736	6,828
MY Exports	137	137	150	134	100	140
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	330	0	0
Food Use Dom. Cons.	0	0	0	0	0	0
Feed Waste Dom. Cons.	5,379	5,243	7,010	6,820	6,425	6,400
Total Dom. Cons.	5,379	5,243	7,010	7,150	6,425	6,400
Ending Stocks	296	296	615	528	211	288
Total Distribution	5,812	5,676	7,775	7,812	6,736	6,828
1000 MT, PERCENT						

Oil, Sunflowerseed EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: May 2012	

	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	6,114	6,110	6,960	7,100	6,300	6,520
Extr. Rate, 999.9999	0	0	0	0	0	0
Beginning Stocks	452	452	135	135	180	190
Production	2,563	2,560	2,918	3,000	2,641	2,760
MY Imports	768	768	1,030	956	1,150	900
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	3,783	3,780	4,083	4,091	3,971	3,850
MY Exports	166	166	210	206	140	170
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	220	220	230	295	230	270
Food Use Dom. Cons.	3,259	3,230	3,460	3,370	3,420	3,200
Feed Waste Dom. Cons.	3	29	3	30	3	25
Total Dom. Cons.	3,482	3,479	3,693	3,695	3,653	3,495
Ending Stocks	135	135	180	190	178	185
Total Distribution	3,783	3,780	4,083	4,091	3,971	3,850
1000 MT, PERCENT						

## Sunflower Seeds

### MY 2012/13:

MY 2012/13 harvest is complete and member states data shows the devastating effects of this year's hot and dry summer in major producing countries in the EU. Total EU sunflower seed production is estimated to drop sharply compared to MY 2011/12 to 6.97 MMT, or by more than 15 percent compared to the last season. Countries with year-to-year reductions in production are Spain (40 percent), Romania (25 percent), France and Italy (10 percent each), Hungary (8 percent) and Bulgaria (6 percent). Germany, on the other hand, benefitted from warm summer but production was still lower than in MY 2011/12. Lower production will be only partially cushioned by relatively high beginning stocks in MY 2012/13. Reportedly, the quality (oil content) of this year crop has suffered due to the drought (by one to two percents) which may affect crush conversion indexes for MY 2012/13.

The smaller EU crop, along with better than initially expected sunflower production in major EU suppliers (Ukraine, Russia, the United States and Argentina in the second half of MY 2012/13) has changed the prospects for MY 2012/13 imports. Imports are revised upward with an increase of over 15 percent compared to MY 2011/12. Most likely, these imports will originate from Black Sea suppliers. In the second half of MY 2012/13, imports of sunflower seeds may be limited at the expense of imports of sunflower meal and sunflower oil, due to expected higher crush and availability in major exporters to the EU. Currently, imports are forecast little above USDA official data, mainly due to the latest developments in the Black Sea where exportable supplies may be higher than previously expected. Factors which might prevent further growth in imports are currently lower price competitiveness of sunflower seeds (and sunflower oil) compared to other oils (especially palm oil) and lower crush margins compared to the last season.

The forecast for the MY 2012/13 EU sunflower crush is 8 percent lower than in MY 2011/12, mainly due to lower domestic availability. Demand is also not as strong as in the previous year due to lower crush margins, although they still remain attractive for crushers. Food and feed demand is not favorable at present for sunflower meal and oil due to their deteriorated price competitiveness over the last several months. Lately sunflower seeds have had lower crush margins than for rapeseed. Member-states expecting lower crush in MY 2012/13 compared to MY 2011/12 are France, Benelux, Italy, Spain, Portugal, Germany, and Austria.

On the other hand, Hungary, Romania and Bulgaria expect new/expanded crushing capacities to be functional this season which will likely sustain higher crush, although still under their full capacity.

An overall tighter market situation in MY 2012/13 will inevitably reduce the ending stocks in MY 2012/13 and

potentially lead to a deficit situation at the end of the year, especially if demand is not rationed through higher pricing earlier in the year.

**MY 2011/12:**

EU production is modified marginally upwards based on member states contributions about final official production data. Trade estimates are based on GTA data until September or for the full marketing year. In MY 2011/12 EU imports of sunflower seeds slowed down due to good internal supply and high domestic use in major exporters. Imports were 26 percent less than EU imported a year earlier. Exports were very good and at the same level as in MY 2011/12.

Crush for MY 2011/12 was further revised upward based on member-states' contributions. Demand for competitively priced sunflower meal and oil, as well as excellent crush margins for sunflower seeds were very high in the first half in MY 2011/12 and crushers were substituting rapeseeds with sunflower seeds. This estimate is higher than USDA official estimate and historically high for the EU representing 16 percent annual growth in EU-27 crush or close to 1.0 MMT increase.

**Sunflower meal**

**MY 2012/13:**

In MY 2012/13 sunflower meal output is forecasted to decrease as a result of projected lower crush. Imports are likely to decline too due to lower global and regional supply compared to last year. It is forecast at 2.9 MMT based on member states estimates. Imports may accelerate in the second half of the marketing year when global supplies are likely to improve, provided that Argentina enjoys favorable crop conditions. Exports are projected stable. Sunflower meal use in the EU is likely to plunge in MY 2012/13 in parallel with lower availability and due to its weakened competitiveness versus other meals. However, sunflower meal use will still remain much above the levels achieved in MY 2010/11.

**MY 2011/12:**

In MY 2011/12, sunflower meal production was adjusted significantly higher as a result of revised crush volume by member states but still slightly below USDA official data. Imports are adjusted based on GTA data for the full marketing year and demonstrates very strong demand by the EU feed industry for price competitive protein meals. Imports are undoubtedly ever high reaching 3.8 MMT or 70 percent annual growth. Respectively, the meal use was revised considerably upward to reflect record high meal inclusion reported by major member states. Historically high sunflower meal use in feed was recorded due to increases in France, Germany, Italy, Hungary, Portugal, Poland, Spain, UK, and Romania as well as in Denmark, Austria, Bulgaria and Benelux.

**Sunflower Oil**

**MY 2012/13:**

Projected sunflower oil output in MY 2012/13 is below the previous year due to expected lower crush. Potentially, lower oil content of this year crop in some countries may further reduce output due to deteriorated conversion indexes. Imports are also forecasted to decline for a range of reasons, such as more limited and expensive global and regional supplies, especially in the first half of the marketing year, lower sunflower oil price competitiveness (especially compared to the palm oil in the beginning of the marketing year but also to rapeseed and soya oil), and reduced demand for industrial purposes and biofuels in the EU. Member states expect about 6 percent lower imports compared to the previous year.

Lower availability and costly supply are likely to lead to weaker food and non-food consumption. Sunflower oil food consumption trends in the EU are not homogeneous. Consumption is seen stable in most countries (France, Benelux, Hungary, Poland, Czech Republic), higher in others (Germany, Romania and Bulgaria) and lower in Austria, Italy, Portugal and UK. In Spain, consumption is projected higher due to exceptionally low olive

oil supply and use this year. Overall, we may see stable to lower EU food use and substitution by rapeseed oil or soybean oil which are currently more price competitive.

MY 2012/13 exports are estimated lower versus MY 2011/12 due to deteriorated price competitiveness of the sunflower oil, however, most recent changes in demand in North Africa and Middle East may moderate this projection later in the marketing year.

#### MY 2011/12:

MY 2011/12 production estimate was revised upward to reflect member states adjustments due to higher crush. Consumption was adjusted higher due to strong attractiveness of sunflower oil compared to other oils; however, it still remains below USDA official data.

### 6. Palm Oil

Coordinator: Bob Flach / FAS The Hague

Oil, Palm EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0		0		0	
Area Harvested	0		0		0	
Trees	0		0		0	
Beginning Stocks	542	542	161	91	161	141
Production	0		0		0	
MY Imports	4,639	4,906	5,200	5,500	5,400	5,500
MY Imp. from U.S.	0		0		0	
MY Imp. from EU	0		0		0	
Total Supply	5,181	5,448	5,361	5,591	5,561	5,641
MY Exports	207	207	200	200	200	200
MY Exp. to EU	0		0		0	
Industrial Dom. Cons.	2,090	2,150	2,210	2,250	2,270	2,350
Food Use Dom. Cons.	2,500	2,700	2,550	2,700	2,550	2,700
Feed Waste Dom. Cons.	223	300	240	300	250	300
Total Dom. Cons.	4,813	5,150	5,000	5,250	5,070	5,350
Ending Stocks	161	91	161	141	291	91
Total Distribution	5,181	5,448	5,361	5,591	5,561	5,641

1000 HA, 1000 TREES, 1000 MT

Official Eurostat trade statistics report a reduction of EU palm oil imports in 2011, from 5.4 MMT in 2010 to about 4.9 MMT. This reduction is reported in all main third country importers in the EU; the Netherlands, Germany, Italy, Spain and the United Kingdom. The lower imports are explained by a narrowing price gap between palm oil and other competing vegetable oils during the second half of 2010 and the first half of 2011. Since April 2012, however, this difference widened as FOB Rotterdam palm oil prices declined while prices for rapeseed oil, soya oil and sunflower seed rose. As a consequence of the increasing competitiveness of palm oil and expanding use for biodiesel production, imports are expected to recover in 2012. In Rotterdam a new biofuel plant with an annual capacity of 800,000 MT of biofuel has been operational since December 2011. During the first half of 2012, Dutch palm oil imports increased with a volume of about 300,000 MT compared to the same period last year. The other importing countries increased third country imports by about five to fifteen percent during the first half of 2012.

In the Official Journal of the European Union dated November 21, 2012, the European Commission approved the biofuels certification scheme of the Roundtable on Sustainable Palm Oil (RSPO), under the Renewable Energy Directive, securing palm oil supply as a feedstock for biodiesel in the EU.

In the EU, the food industry in Germany, France, the Netherlands, the United Kingdom and Belgium are major members of the RSPO, together with palm oil producing countries (principally Malaysia and Indonesia), and have increased their use of RSPO certified palm oil. Several member states set the goal of using only palm oil certified by the Roundtable on Sustainable Palm Oil (RSPO) by the end of 2015. In September 2012, the volume of RSPO certified palm oil was estimated at 7.2 MMT, significantly up from 1.5 million MT in 2009.

In France, there is a discussion in the Parliament on whether to increase taxes on food products containing palm oil, due to health concerns. The so-called “Nutella-tax” passed the Senate but was rejected by the lower Chamber. It is likely to be proposed for vote again in a public health bill scheduled in 2013.

**7. Olive Oil**

Coordinator: Diogo Machado / FAS Madrid

Oil, Olive EU-27	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Nov 2010		Market Year Begin: Nov 2011		Market Year Begin: Nov 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Trees	6,750	0	6,750	0	6,750	0
Beginning Stocks	530	632	541	652	646	596
Production	2,500	2,205	2,600	2,203	2,150	1,700
MY Imports	85	83	85	98	125	150
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	3,115	2,920	3,226	2,953	2,921	2,446
MY Exports	544	484	550	563	500	350
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	50	50	50	50	50	50
Food Use Dom. Cons.	1,980	1,734	1,980	1,744	1,970	1,746
Feed Waste Dom. Cons.	0	0	0	0	0	0
Total Dom. Cons.	2,030	1,784	2,030	1,794	2,020	1,796
Ending Stocks	541	652	646	596	401	300
Total Distribution	3,115	2,920	3,226	2,953	2,921	2,446

1000 HA, 1000 TREES, 1000 MT

**MY 2012/13**

The EU-27 is the world’s leading producer and consumer of olive oil. The majority of olive oil production is concentrated in eight EU Member states: Spain, Italy, Greece, Portugal, Slovenia, Malta, Cyprus and France. Aggregate EU production is estimated to be more than 20 percent lower in MY 2012/13. With consumption stable, the lower availability is expected to reflect in an important fall in exports while imports may grow, mostly from North Africa and Middle Eastern countries. Average olive oil prices have risen steadily since June.

In Spain, production in MY 2012/13 is estimated to fall by over 40 percent to around 900,000 MT. This is a counter-harvest year that follows three very good years so the cyclical fall in production was somewhat expected. However, the effects of this natural cycle were compounded by lack of rain and the high temperatures felt in 2012, particularly during the flowering and fruit setting period. While the drought caused yields to drop in non-irrigated areas – or irrigated areas with limited access to water – the extreme heat made for a lower number of viable olives per tree. This was particularly damaging as trees with fewer fruits had a lower capacity to make use of rains that finally fell in October and November 2012.

Olive oil production in Italy is not expected to be strong in MY2012/13 although fears over much reduced final

yields due to the dry weather conditions at ripening have been eased by recent rainfall. On the bright side, the dry weather did not foster the spread of pathogens (e.g., olive fruit fly) and quality is expected to be quite good. According to the industry, only a few Italian olive oil producers will apply to Private Storage Aid assuming virgin oil prices stay high enough.

In Greece, production is forecast to increase slightly whereas in Portugal a 25 percent reduction in production is estimated for MY2012/13 because the hot weather hit yields, especially in non irrigated groves.

**8. Related EU-27 and Country Reports:**

**Oilseeds Reports**

Report Title
<p><b>  Unfavorable Weather Conditions Limit EU-27 Oilseeds Production   Oilseeds and Products, Biofuels, Grain and Feed   Vienna   EU-27   8/10/2012</b></p> <p>This report provides EU-27 production, supply, and demand forecasts for oilseeds, protein meals and related products. <a href="#">Unfavorable Weather Conditions Limit EU-27 Oilseeds Production Vienna EU-27 8-1-2012</a></p>
<p><b>  Select   Despite Winter Kill Modest Rebound in EU-27 Rapeseed Production   Oilseeds and Products   Vienna   EU-27   4/17/2012</b></p> <p>Total EU-27 oilseeds area in MY 2012/13 is forecast to decrease by 1.8 percent and is expected to total 11.4 million ha. The decrease is mainly explained by 4 percent lower acreage of rapeseed due to unfavorable wet conditions during planting in Denmark, winterkill mainly in Bulgaria and Hungary, and drought in Romania. A marginal increase of sunflower area is projected due to re-sowing of winterkill areas almost offset by a decline due to drought in Spain. Soybean area is also expected to de... <a href="#">Oilseeds and Products Annual Vienna EU-27 4-5-2012</a></p>
<p><b>  Oilseeds and Products   Berlin   Germany   1/13/2012</b></p> <p>In recent years, the German Green Party has promoted policies designed to replace imported soybeans with domestically produced protein crops. Recognizing that an important political party is openly advocating an end to soybean imports - the largest U.S. agricultural export to Germany - we are providing updated analysis on the feasibility of this policy approach. We conclude that while it would be impracticable for Germany to produce enough plant protein to meet domestic demand, the campaign aga... <a href="#">Green Movement to End Soybean Imports – An Analysis Berlin Germany 1-6-2012</a></p>

**Related Topics**

Report Title
<p><b>France - Actions Towards a More Sustainable Agriculture Agricultural Situation Agriculture in the Economy Biofuels Biotechnology - GE Plants and Animals Climate Change/Global Warming/Food Security Paris France 11/14/2012</b></p> <p>Sustainable development is a top priority for France. A National Strategy for Sustainable Development was developed, resulting in a larger organic industry, environmental labeling, efforts to reduce pesticide use, and research and innovation projects. As consumers are receptive to sustainability, both upstream and downstream private initiatives have also developed, resulting in a number of logos on food products. FAS/Paris outreach activities have illustrated a variety of means taken in the United States to make agro-food production more sustainable. Theses activities have contributed to improve the image of U.S. food products and are likely to open minds and markets to U.S products and methods of production in the future. <a href="#">France - Actions Towards a More Sustainable Agriculture Paris France 10-23-2012</a></p>
<p><b>Using 'Sustainability' to Market U.S. Foods In Europe Special Certification - Organic/Kosher/Halal Retail Foods Market Promotion/Competition Vienna EU-27 11/7/2012</b></p> <p>This report provides information and analysis for U.S. food and agricultural exporters on the topic of 'sustainability'. <a href="#">Using 'Sustainability' to Market U.S. Foods In Europe Vienna EU-27 11-2-2012</a></p>
<p><b>  Grains and Oilseeds Market Update   Grain and Feed, Oilseeds and Products   Sofia   Bulgaria   10/29/2012</b></p>

The record summer drought and temperatures have continued into the fall. While weather was very favorable for harvest of spring crops and for timely planting of fall crops, the drought's continuation through the fall is raising concern over development of winter crops - wheat and barley, and specifically rapeseeds. The potential for record yields from fall crops is diminishing rapidly with the fate of the rapeseeds crop highly dependent on weather/moisture over the next 2 to 3 weeks. MY12/13 w...

[Grains and Oilseeds Market Update Sofia Bulgaria 10-24-2012](#)

**| First-Generation Biofuels Weakened - Advanced Biofuels in Progress | Biofuels, Agriculture in the Economy, Agriculture in the News, Oilseeds and Products, Biotechnology and Other New Production Technologies | Paris | France | 10/29/2012**

France totals 20 percent of the European Union's production and consumption of biofuels. In the past two years, first-generation biofuel production has been pressed down by a combination of reduced national and European incentives, together with more competitive market prices for vegetable oils in the food market. The implementation of the Renewable Energy Directive maintains domestic consumption high, with 7.2 percent biofuels blending into transportation fuels in 2011. This has led to boo...

[First-Generation Biofuels Weakened - Advanced Biofuels in Progress Paris France 10-5-2012](#)

**| Romanian spring crops withered by heat and drought | Grain and Feed, Oilseeds and Products | Bucharest | Romania | 10/15/2012**

Weather damaged spring crops registered declines between 30-50 percent as harvest finishes nearly a month earlier than normal. Danube River terminals found the drought reduced water flow critically low in August-early September not as onerous as it allowed greater time to source commodities to fulfill contracts. Low river flow prevented and generally slowed commodity movement to Constanta, the country's main Black Sea terminal port, during this period. Domestic support meant to compensate the...

[Romanian spring crops withered by heat and drought Bucharest Romania 10-10-2012](#)

**Drought Hits Bulgarian Spring Crops | Grain and Feed, Oilseeds and Products, Trip Report | Sofia | Bulgaria | 8/30/2012**

During the August 13-15 period, Ag Sofia accompanied by an FAS/Washington analyst, retraced a crop tour conducted five years ago of corn/sunflower production regions in Bulgaria. Participants assessed the drought situation in the region, evaluated general development of agriculture in the region over the last 5 years and engaged producers, agricultural associations and agri-business entities to better understand trends emerging in the sector. This report summarizes observations of the partic...

[Drought Hits Bulgarian Spring Crops Sofia Bulgaria 8-27-2012](#)

**| Ag Ministry publishes draft 'protein strategy' | Oilseeds and Products | Berlin | Germany | 8/21/2012**

Efforts by the German Green party to end soybean imports are beginning to draw more mainstream political action. In June, the German Ministry of Food, Agriculture and Consumer Protection (BMELV) published a draft 'protein strategy' that calls for, among other things, increased legume production as a substitute for imported soybeans. At the national policy level, the focus is mainly on legume crop research. For the CAP, to which Germany is the largest contributor, there is a desire to encourag...

[Ag Ministry publishes draft 'protein strategy' Berlin Germany 8-8-2012](#)

**| Crop Situation Update | Grain and Feed, Oilseeds and Products, Livestock and Products | Prague | Czech Republic | 8/15/2012**

Farmers in the Czech Republic have so far harvested approximately 25 percent of all grains and over 60 percent of rapeseed. Yields vary among different regions, however, on average they are lower compared to the previous year. Total grain production is forecast approximately 20 percent lower compared to previous year.

[Crop Situation Update Prague Czech Republic 8-10-2012](#)

**| Grains and Oilseeds Market Update | Grain and Feed, Oilseeds and Products | Sofia | Bulgaria | 8/3/2012**

June and especially July were excessively and persistently hot and dry. Rains were scattered and below norm. The heat wave hovered over the country at a critical stage of development for corn, and to a certain extent sunflower, affecting pollination and grain filling. The negative effect on corn yields is notable. Sunflower is also affected and yield potential reduced, however, not yet to the degree seen with corn. If the current drought continues, corn and sunflower yields can be expected t...

[Grains and Oilseeds Market Update Sofia Bulgaria 7-30-2012](#)

**| Biotechnology - Food Security - Sustainability in the Americas | Biotechnology - GE Plants and Animals, Climate Change/Global Warming/Food Security, Oilseeds and Products | Paris | France | 8/1/2012**

In June 2012, farmers from the International Soybean Growers Alliance (ISGA), including two Brazilians, one Paraguayan, and two Americans, traveled to Paris to illustrate how their cultivation practices, including no-till, crop rotation, and biotech seeds, have contributed to an increased productivity, total production, and exports, while reducing environmental impacts. ISGA farmers expressed concerns about France's and the EU's slow approval process of new biotechnology products, while the div...

[Biotechnology - Food Security - Sustainability in the Americas Paris France 7-9-2012](#)

**| Corn and Sunflower crops Affected by Persistent Drought | Grain and Feed, Oilseeds and Products | Bucharest | Romania | 7/26/2012**

Harvesting of winter crops is underway with yields lower than expected. Wheat quality is reported as very good, with a large percentage of the amount meeting milling criteria. Abundant rainfall in May improved soil moisture levels, but a persistent drought since June is affecting spring crops, namely corn and sunflower. Yields may drop further if no significant precipitation is received in the coming weeks.

<p><a href="#">Corn and Sunflower crops Affected by Persistent Drought Bucharest Romania 7-23-2012</a></p> <p><b>  EU Biofuels Annual 2012   Biofuels   The Hague   EU-27   7/10/2012</b></p> <p>EU Member States (MS) are mandated to reach a minimum of 10 percent for renewable energy consumed in transport in 2020. In 2011, about a fifth of the domestic use of biofuels was imported from outside the EU. Despite a reclassification of bioethanol blends to a higher tariff rate, 2012 and 2013 imports from the United States are anticipated to remain at the same levels as last year, around 1 billion liters. Starting in the fourth quarter of 2012 and in 2013, overall EU imports of biodiesel ar...</p> <p><a href="#">Biofuels Annual The Hague EU-27 6-25-2012</a></p>
<p><b>  Grains and Oilseeds Market Update   Grain and Feed, Oilseeds and Products   Sofia   Bulgaria   5/14/2012</b></p> <p>Bulgaria experienced challenging fall and winter weather that stymied seeding operations and brought record low temperatures and snowfall. Rapeseed recorded the greatest winterkill losses followed by some damage to barley, and minimal effect on wheat. Damaged rapeseed crops are expected to be replaced with corn and sunflower seed in 2012. Wet weather in May will be critical for crop development and, eventually, higher yield as spring to date has remained sparse of moisture. This follows M...</p> <p><a href="#">Grains and Oilseeds Market Update Sofia Bulgaria 5-9-2012</a></p>
<p><b>Spain Enacts Biodiesel Production Quota System   Biofuels, Oilseeds and Products   Madrid   Spain   4/30/2012</b></p> <p>Right after Argentina announced the expropriation of 51% of YPF, a subsidiary of Repsol, the Spain's largest petroleum company, the Government of Spain decided to publish a Ministerial Order to establish a biodiesel production quota system. This Ministerial Order lays down the rules to allocate biodiesel production quotas to EU based biodiesel producers whose production would be eligible to meet consumption mandates. The implementation of this quota system would ultimately restrict third count...</p> <p><a href="#">Spain Enacts Biodiesel Production Quota System Madrid Spain 4-24-2012</a></p>
<p><b>  Select   All eyes on the weather - again   Grain and Feed   London   EU-27   4/18/2012</b></p> <p>The weather has already made its mark on the MY2012/13 crop and is likely to remain the focus over the coming months. A severe cold spell in late January and early February caused above average winter losses in some parts of the EU27, especially France, meaning some fields will need to be resown to spring crops. A prolonged dry period through March and into April will also become a concern if rains are not forthcoming ahead of harvest. In spite of this, 284MMT of grain is forecast to be harve...</p> <p><a href="#">Grain and Feed Annual London EU-27 4-13-2012</a></p>
<p><b>  Preliminary Reports on Winterkill Loses in Poland   Grain and Feed   Warsaw   Poland   4/4/2012</b></p> <p>According to the preliminary evaluation significant losses in winter wheat and rapeseed plantations were reported in Western and Central Poland. Although detailed information about the damage are not available yet, two provinces already requested assistance from the central government to mitigate the effects of the winterkill losses.</p> <p><a href="#">Preliminary Reports on Winterkill Loses in Poland Warsaw Poland 3-30-2012</a></p>
<p><b>  Portugal Biofuels Standing Report   Biofuels   Madrid   Portugal   3/12/2012</b></p> <p>There is no production of bioethanol for transport fuel in Portugal. Biodiesel production is dependent on diesel sales under a blending quota system and stands currently at around 340,000 MT per annum. Portugal transposed the Renewable Energy Directive in 2010 but the emission of Biofuel Entitlements (TdB) will only be dependent on the compliance with sustainability criteria from next 1 January 2013.</p> <p><a href="#">Portugal Biofuels Standing Report Madrid Portugal 3-7-2012</a></p>
<p><b>  Bio-Fuels   Madrid   Portugal   2/17/2012</b></p> <p>There is no production of bioethanol for transport fuel in Portugal. The fossil fuel suppliers have managed to successfully lobby the Government into establishing mandates for liquid biofuels as a whole and to later introduce quotas for biodiesel only. Sales of biodiesel incorporated in gasoil diesel rose in 2010 to 375,000 tons as the share of biodiesel in road transport diesel is now 7% v/v, the maximum limit recommended by the Fuel Quality Directive EN 590 (FQD). However in the months to ...</p> <p><a href="#">Portugal Biofuels Standing Report Madrid Portugal 11-10-2011</a></p>
<p><b>  Oilseeds and Products, Biotechnology, Biotechnology and Other New Production Technologies, Grain and Feed   Paris   France   2/9/2012</b></p> <p>Among European Union (EU) Member States, France ranks above average in being protein-independent. However, despite efforts to reduce dependence on imported North and South soybean meal as the number one source of proteins in animal feed, the amount of soybean meal used in France's animal feed have remained relatively stable at 4 million metric tons (MT) for the past 25 years. At the same time, the use of rapeseed meal in animal feed has sharply increased from minor levels to more than 2 millio...</p> <p><a href="#">Incentives and Plant Breeding Breakthroughs to Reduce Soy Imports Paris France 2-3-2012</a></p>
<p><b>  Bio-Fuels, Livestock and Products, Oilseeds and Products, Trade Policy Monitoring, Climate Change   The Hague   Netherlands EU-27   2/3/2012</b></p> <p>During the last decade, the European retail sector has increasingly sourced sustainably produced food products. At the same time, food processors stepped into this market and increased their sourcing for sustainably produced raw materials. In this report, the movement towards sustainability in three commodity markets is briefly outlined, namely the biofuels market, the soya market and the market for meat products.</p> <p><a href="#">Sustainability in the EU Commodity Markets The Hague Netherlands EU-27 1-31-2012</a></p>
<p><b>  Bio-Fuels   Rome   Italy   1/13/2012</b></p>

The Italian biofuels industry is slowly developing to meet the EU's 2020 mandatory 10-percent biofuel use in transportation fuels. However, lack of support from the government, stiff competition from South America, and a complicated and uncertain EU and Italian legislative framework are severely hampering the industry's growth. Italian biodiesel output is expected to fall some 32 percent to about 500,000 MT in 2011 while the bioethanol fuel production is still not relevant.

[Italian Biofuels 2011 Rome Italy 12-29-2011](#)

**| Bio-Fuels, Oilseeds and Products | Madrid | Spain | 11/22/2011**

This report provides an overview of Spain's biodiesel sector including MS specific policy, production supply and demand data. Spain is among the three top MS in terms of biodiesel production capacity and consumption. However, industry sources report a very low use rate of installed capacity caused mainly by stiff competition from third-country biodiesel imports to Spain. The sustainability criteria provisions within the Renewable Energy Directive (RED) have recently been transposed to national regulation by...

[Spain's Biodiesel Standing Report Madrid Spain 11-7-2011](#)