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EU-28 Oilseeds Market Update

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Report Highlights:

This report provides EU-28 production, supply, and demand forecasts for major EU oilseeds, protein meals and related products.

Introduction

This report presents the outlook for the three major oilseeds (soybean, rapeseed and sunflower) in the EU-28. 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-28 oilseeds reporting team would like to thank Agata Kingsbury 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-28	= European Union of 28 member states (Austria, Belgium, Bulgaria, Croatia, 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
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:

July-June

Rapeseed complex

October -September

Soybean complex

Sunflower complex

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1. Executive Summary

Coordinator: Roswitha Krautgartner / FAS Vienna

Production

Latest estimates of total EU-28 production in MY 2015/16 of major oilseeds (rapeseeds, sunflower and soybeans) show a year-on-year decrease of 11.3 percent which is less than previous expectations. This is mainly an effect of smaller sunflower acreage and even lower sunflower yields. Especially France, Bulgaria, Romania, Hungary, and Italy report a reduction of their sunflower crop due to persistently hot and dry weather conditions during July and August. Rapeseed crop turned out to be better in France, Spain and the U.K. but these gains were offset by smaller than anticipated production in Poland, Hungary and Czech Republic and the forecast for EU-28 total rapeseed production in MY 2015/16 remains unchanged. The hot and dry summer has also affected soybean yields but the significant increase in total soybean acreage is expected to result in an overall production increase of 9 percent.

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

Coordinator: Roswitha Krautgartner / FAS Vienna

EU-28 Area of Major Oilseeds (in 1,000 ha)

Area	2012	2013	2014	2015e
Rapeseed	6,317	6,800	6,800	6,600
Sunflower	4,236	4,620	4,283	4,152
Soybeans	431	480	580	770
Total	10,984	11,900	11,663	11,522

Note: The years refer to the calendar year in which the harvest occurs (e.g. 2013 = harvested in CY 2013, marketed in MY 2013/14)

e = estimate

Source: FAS EU-28

EU-28 Major Oilseeds Production (in 1,000 MT)

Production	2012	2013	2014	2015e
Rapeseed	19,631	20,978	24,250	21,300
Sunflower	7,131	9,060	8,940	7,750
Soybeans	957	1,230	1,830	2,000
Total	27,719	31,268	35,020	31,050

Note: The years refer to the calendar year in which the harvest occurs (e.g. 2013 = harvested in CY 2013, marketed in MY 2013/14)

e = estimate

Source: FAS EU-28

EU-28 Major Oilseed Crush (in 1,000 MT)

Crush	MY 2012/13	MY 2013/14	MY 2014/15e	MY 2015/16f
Rapeseed	22,700	23,950	24,800	23,400
Soybeans	12,325	13,400	13,500	13,800
Sunflower	6,540	7,600	7,550	7,100
Total	41,565	44,950	45,850	44,300

e= estimate, f = forecast

Source: FAS EU-28

Feed, Waste Use of Major Oilseeds Meals in the EU-28 (in 1,000 MT)

Feed, Waste Use Meals	MY 2012/13	MY 2013/14	MY 2014/15e	MY 2015/16f
Soybeans	26,000	28,300	29,300	30,000
Rapeseed	12,900	13,600	13,900	13,450
Sunflower	7,000	7,200	7,150	7,125
Total	45,900	49,100	50,350	50,575

e= estimate, f = forecast

Source: FAS EU-28

Food Use of Major Oilseeds Oils in the EU-28 (in 1,000 MT)

Food Use Oil	MY 2012/13	MY 2013/14	MY 2014/15e	MY 2015/16f
Rapeseed Oil	2,500	2,800	2,900	2,850
Soybean Oil	1,000	990	995	1,000
Sunflower Oil	3,300	3,400	3,500	3,490
Total Oils	6,800	7,190	7,395	7,340

e= estimate, f = forecast

Source: FAS EU-28

Biofuels Use of Major Oilseeds Oils in the EU-28 (in 1,000 MT)

Biofuels	MY 2012/13	MY 2013/14	MY 2014/15e	MY 2015/16f
Feedstock/Rapeseed Oil	5,850	6,200	6,450	6,250
Feedstock/Soybean Oil	325	400	500	520
Feedstock/Sunflower Oil	92	140	120	105
Total	6,267	6,740	7,070	6,875

e= estimate, f = forecast

Source: FAS EU-28

Other Industrial Use of Major Oilseeds Oils in the EU28 (in 1,000 MT)

Other Industrial Use	MY 2012/13	MY 2013/14	MY 2014/15e	MY 2015/16f
Rapeseed Oil	850	750	750	750
Soybean Oil	516	500	450	430
Sunflower Oil	128	110	120	135
Total	1,494	1,360	1,320	1,315

e= estimate, f = forecast

Source: FAS EU-28

3. Soybean Complex

Coordinator: Lucile Lefebvre / FAS Paris

Trade figures are revised according to the most recent data available from the Global Trade Atlas; harvest and crush estimates from producing countries.

Oilseed, Soybean Market Begin Year	2013/2014		2014/2015		2015/2016	
	Oct 2013		Oct 2014		Oct 2015	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	480	480	580	580	732	770
Area Harvested	472	471	566	570	730	760
Beginning Stocks	302	302	245	408	542	548
Production	1211	1230	1687	1830	1950	2000
MY Imports	12985	13293	13450	12850	13500	13100
MY Imp. from U.S.	3647	3647	3500	4400	3450	3750
Total Supply	14498	14825	15382	15088	15992	15648
MY Exports	57	57	120	120	100	120
Crush	13436	13400	13900	13500	14500	13800
Food Use Dom. Cons.	160	160	170	170	170	170
Feed Waste Dom. Cons.	600	800	650	750	660	850
Total Dom. Cons.	14196	14360	14720	14420	15330	14820
Ending Stocks	245	408	542	548	562	708
Total Distribution	14498	14825	15382	15088	15992	15648

(1000 HA) ,(1000 MT)

Source: FAS EU-28

Meal, Soybean Market Begin Year	2013/2014		2014/2015		2015/2016	
	Oct 2013		Oct 2014		Oct 2015	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	13,436	13400	13900	13500	14100	13800
Beginning Stocks	120	120	170	133	318	241
Production	10,614	10500	10,980	10,700	11,455	10,900
MY Imports	18,175	18138	19,550	19,100	20,300	19,600
MY Imp. from U.S.	1,230	1228	1,300	1,120	1,200	1,150
Total Supply	28,909	28758	30,700	29,933	32,073	30,741
MY Exports	297	283	340	350	400	370
Industrial Dom. Cons.	10	10	10	10	10	10
Food Use Dom. Cons.	32	32	32	32	32	32
Feed Waste Dom. Cons.	28,400	28300	30,000	29,300	31,350	30,000
Total Dom. Cons.	28,442	28342	30,042	29,342	31,392	30,042
Ending Stocks	170	133	318	241	281	329
Total Distribution	28,909	28758	30,700	29,933	32,073	30,741

(1000 MT)

Source: FAS EU-28

Oil, Soybean Market Begin Year	2013/2014		2014/2015		2015/2016	
	Oct 2013		Oct 2014		Oct 2015	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	13436	13400	14000	13500	14700	13800
Beginning Stocks	202	202	339	275	259	205
Production	2553	2450	2660	2565	2795	2620
MY Imports	325	329	260	260	150	180
MY Imp. from U.S.	0	0	0	0	0	0
Total Supply	3080	2981	3259	3100	3204	3005
MY Exports	771	766	1000	900	950	900
Industrial Dom. Cons.	900	900	950	950	950	950
Food Use Dom. Cons.	1000	990	1000	995	1000	1000
Feed Waste Dom. Cons.	70	50	50	50	50	50
Total Dom. Cons.	1970	1940	2000	1995	2000	2000
Ending Stocks	339	275	259	205	254	105
Total Distribution	3080	2981	3259	3100	3204	3005

(1000 MT)

Source: FAS EU-28

MY 2015/16

The hot and dry summer has affected soybean yields, which are expected to be lower than in 2014/15. However, the significant increase in area compared to 2014/15 is expected to lead to a 9 percent increase in total soybean production. The area planted in soybeans goes up in all the producing countries. In Romania, France, and Hungary, the government supports soybean production in order to reduce the dependence on imports and the use of GE products. Overall, local soybean production remains minor compared to imports. In 2015/16, the EU is expected to produce 2,000 thousand MT of soybeans and to import 13,100 thousand MT of soybeans and 19,600 thousand MT of soybean meal.

In 2015/16, soybean crush is expected to increase compared to 2014/15. Soybean meal consumption should keep rising because of the tight rapeseed market (soybean meal substitutes rapeseed meal in feed rations) and because chicken broiler production keeps increasing in Poland. Soybean meal imports are expected to keep rising (+ 2.6 percent).

In 2015/16, soybean oil production is expected to increase by 2 percent compared to 2014/15 whereas consumption and exports could remain stable. As a consequence, imports are expected to go down.

MY 2014/15

In 2014/15, soybean production increases by 49 percent compared to 2013/14 to reach 1,830 thousand MT, which does not prevent soybean meal imports from keeping increasing (+ 5 percent) to 19,100 thousand MT.

4. Rapeseed Complex

Coordinator: Leif Erik Rehder / FAS Berlin

Trade figures are revised according to the most recent data available from the Global Trade Atlas; harvest and crush estimates from producing countries.

Oilseed, Rapeseed Market Begin Year	2013/2014		2014/2015		2015/2016	
	Jul 2013		Jul 2014		Jul 2015	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	6770	6800	6760	6800	6565	6600
Area Harvested	6767	6710	6757	6716	6509	6534
Beginning Stocks	2502	2502	2075	1844	2275	2074
Production	21304	20978	24394	24250	21300	21300
MY Imports	3495	3524	2356	2318	2200	2300
MY Imp. from U.S.	7	7	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	27301	27004	28825	28412	25775	25774
MY Exports	290	290	590	588	300	300
MY Exp. to EU	0	0	0	0	0	0
Crush	23966	23950	24990	24800	23300	23400
Food Use Dom. Cons.	0	0	0	0	0	0
Feed Waste Dom. Cons.	970	920	970	950	950	920
Total Dom. Cons.	24936	24870	25960	25750	24250	24420
Ending Stocks	2075	1844	2275	2074	1225	1054
Total Distribution	27301	27004	28825	28412	25775	25774
(1000 HA) ,(1000 MT)						

Source: FAS EU-28

Meal, Rapeseed Market Begin Year	2013/2014		2014/2015		2015/2016	
	Jul 2013		Jul 2014		Jul 2015	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	23966	23950	24990	24800	23300	23400
Extr. Rate, 999.9999	0.575	0.566	0.575	0.564	0.575	0.564
Beginning Stocks	89	89	215	135	222	273
Production	13780	13550	14370	14000	13398	13200
MY Imports	457	457	451	452	450	450
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	14326	14096	15036	14587	14070	13923
MY Exports	361	361	414	414	300	300
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.	13750	13600	14400	13900	13600	13450
Total Dom. Cons.	13750	13600	14400	13900	13600	13450
Ending Stocks	215	135	222	273	170	173
Total Distribution	14326	14096	15036	14587	14070	13923

Source: FAS EU-28

Oil, Rapeseed Market Begin Year	2013/2014		2014/2015		2015/2016	
	Jul 2013		Jul 2014		Jul 2015	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Crush	23966	23950	24990	24800	23300	23400
Extr. Rate, 999.9999	0.415	0.4171	0.415	0.4153	0.415	0.418
Beginning Stocks	32	32	203	214	279	269
Production	9946	9990	10371	10300	9670	9780
MY Imports	296	303	261	261	270	280
MY Imp. from U.S.	2	0	2	0	2	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	10274	10325	10835	10775	10219	10349
MY Exports	306	311	356	356	300	300
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	7450	6950	7675	7200	7300	7000
Food Use Dom. Cons.	2300	2800	2500	2900	2450	2850
Feed Waste Dom. Cons.	15	50	25	50	25	50
Total Dom. Cons.	9765	9800	10200	10150	9775	9950
Ending Stocks	203	214	279	269	144	129
Total Distribution	10274	10325	10835	10775	10219	10349

Source: FAS EU-28

MY 2015/16

The rapeseed harvest in France, Spain and the U.K. turned out better than expected. However these gains were offset by smaller than anticipated production in Poland, Hungary and the Czech Republic. In total, European rapeseed production is expected to reach 21.3 MMT in MY 2015/16. This means that there are 3 MMT less domestically produced rapeseed available on the European market than in the 2014/15 when record production hit the European market. One factors for the decrease is that European farmers planted nearly 200,000 hectares less rapeseed than the year before. And, average yields in the EU were still good but down from last year. The smaller supply of domestically produced rapeseed will lead to a tight European market. Global rapeseed demand is expected to outstrip production in 2015/16. Thus, there is not much upward potential for higher exports to Europe from Australia and Ukraine, the two main suppliers. Exports, crushing and ending stocks are expected to decrease significantly. This will also reduce the supply of rapeseed oil and meal. There is an ample supply of soybeans globally. If possible, oil mills will switch and start crushing soybeans instead of rapeseed. Thus, soybean meal is expected to substitute rapeseed meal in feed ratios to some extent.

MY 2014/15

European rapeseed production and crushing hit record levels in MY 2014/15. The abundant supply led to lower imports and high export volumes to Turkey, United Arab Emirates, Israel and Pakistan. Stocks also increased. The European dairy industry was the driving factor for rapeseed meal on the demand side. The use of rapeseed oil for biodiesel was still highly important but food use has also increasingly become a factor.

Oil, Sunflowerseed Market Begin Year	2013/2014		2014/2015		2015/2016	
	Oct 2013		Oct 2014		Oct 2015	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	7606	7600	7500	7550	7200	7100
Extr. Rate, 999.9999	0.4194	0.4197	0.4193	0.4199	0.4194	0.4197
Beginning Stocks	58	58	255	255	200	195
Production	3190	3190	3145	3170	3020	2980
MY Imports	1039	1039	950	900	900	980
MY Imp. from U.S.	0	0	0	0	0	0
Total Supply	4287	4287	4350	4325	4120	4155
MY Exports	372	372	380	380	300	300
Industrial Dom. Cons.	250	250	260	240	240	230
Food Use Dom. Cons.	3400	3400	3500	3500	3465	3490
Feed Waste Dom. Cons.	10	10	10	10	10	10
Total Dom. Cons.	3660	3660	3770	3750	3715	3730
Ending Stocks	255	255	200	195	105	125
Total Distribution	4287	4287	4350	4325	4120	4155

Source: FAS EU-28

Sunflower Seeds

MY2015/16

The latest estimate for the EU-28 shows that planted area under sunflower was reduced more significantly than estimated earlier, by 3 percent (131,000 HA) compared to MY2014/15. Major producing countries such as France, Spain, Romania and Bulgaria reduced planted and harvested areas, with the only exception of Hungary which increased its area by 5.5 percent. Italy, Portugal, Germany, Austria, Croatia, and Czech Republic had no changes in sunflower plantings this year.

Expectations for average yields have significantly deteriorated since early July. The weather in July and August has been persistently dry with scorching high temperatures in key producing countries. Adverse weather affected pollination and overall development of the crop. Despite variations among member states, early harvest reports show more than usual not-well-filled seeds, higher percentage of empty seeds, smaller size of seeds, and lower oil content.

As of early October, Spain estimates production reduction at 23 percent compared to MY2014/15, France at 19 percent, Bulgaria and Romania at 15 percent each, Hungary at 7 percent and Italy at 4 percent. Other producers also report reductions in their sunflower crops: Slovakia at 13 percent and Czech Republic at 25 percent. Overall, the combination of lower planted and harvested area in the EU-28 with unfavorable weather is projected currently to lead to a decline in our earlier estimate to 7.75 MMT. This is 14 percent lower than MY2014/15 production and below USDA official estimate from September. Harvest is still progressing in most member states and the present estimate may have a potential for a downward revision with the final harvest data.

Currently we forecast imports of sunflower seeds in MY2015/16 to be 15-17 percent lower than in MY2014/15. Despite shorter domestic supply in the EU-28 and likely good crops in traditional suppliers Ukraine and Russia, favorable crush demand in these countries is likely to prevent exports of seeds. In addition, Moldova which was the main source of sunflower seeds for the EU this marketing year also faces a poor crop and its exportable quantities are under question. Thus, lower availability in the EU-28 may also lead to a decline in exports of sunflower seeds. We revised our estimate for MY2015/16 exports to be significantly below (35 percent) the levels achieved in MY2014/15.

Beginning stocks in MY2015/16 are estimated to be also lower than previously expected since the crush at the end of MY2014/15 has been higher in select countries (Spain by 2 percent, Romania by 6 percent, Hungary by 22 percent, Bulgaria by 13 percent) which exceeded slight reductions in other member states (France by 1.5 percent and Italy). As a result, ending stocks in MY2014/15 declined and currently our estimate is below USDA official number and less than the ending stocks a year before. Thus the current marketing year starts with lower stocks, along with a 3-year low harvest, resulting in less domestic supply in the EU.

As a result, the current forecast for EU-28 crush is at lower level compared to the previous estimate and to MY2014/15 (by 6.0 percent). The EU crushing industry faces declining and much lower crushing margins compared to the previous season, and even stronger than previously expected competition from soybeans. Most member states forecast reduced crush compared to MY2014/15 (Spain 20 percent, France 6 percent, Romania 8 percent, Hungary 13 percent, Italy 4 percent, and Bulgaria 12 percent). However, despite the current price pressure from the vegetable oils, the EU-28 demand for edible sunflower oil remains good and less price elastic.

The demand for sunflower meal is likely to be lower due to less crush and availability but still stable due to projected better competitiveness compared to the rapeseed meal. At the same time, sunflower meal faces increasingly strong competition from soybean meal.

The forecast for food use and feed/seed/waste is also reduced due to lower supply and in the case with food use, due to reported challenges with quality.

MY2014/15

Marginal adjustments were done in trade figures to reflect the most recent trade data (World Trade Atlas as of July 2015). Moldova remained the major source of sunflower seeds for the EU, followed by the United States and Ukraine. In the period January-July 2015, EU imports of sunflower seeds were 13 percent higher with sourcing from Moldova at 78 percent more and from the United States at 5 percent more than a year earlier. However, the overall imports in MY2014/15 to date (October 2014-July 2015) were 22 percent lower compared to the previous season.

EU-28 exports of sunflower seeds for October 2014-July 2015 were 24 percent lower compared to the corresponding period in the previous year with major exporters being Romania and Bulgaria. The main reason for this decline was higher crush demand in these countries as well as weaker demand from traditional export markets. Main export destinations remained Pakistan, Turkey and South Africa. We estimate annual exports to be 15 percent lower in MY2014/15 compared to MY2013/14.

Sunflower Meal

MY2015/16

EU-28 sunflower meal output is forecast to have a bigger, 7 percent, reduction in line with the decline in crush. Imports are projected to increase (4-5 percent) compared to the current year to compensate for lower domestic availabilities with likely sources from the Black Sea. EU-28 demand for sunflower meal is likely to be still good but the use is forecast to decline (1-2 percent) compared with the current season due to likely more attractive use of soybean meal. The United Kingdom, France and Poland expect higher use of sunflower meal while other member states expect flat or lower consumption. High protein sunflower meal is still expanding its market share in the EU. Sunflower meal exports are forecast to decline by 25 percent due to lower supply, good domestic demand and expected stronger competition from the Black Sea exporters. Ending stocks are projected to decrease significantly and support tighter stocks-to-use ratio.

MY2014/15

Imports of sunflower meal during October 2014-July 2015 (World Trade Atlas) were 5 percent lower compared to the corresponding period in the previous season. Currently, we estimate the annual imports for the season to be 2.0 percent lower than in MY2013/14. However, higher crush and production in the second part of the season are likely to compensate for lower imports. Thus sunflower meal use in MY2014/15 is currently estimated to be only 1 percent lower than in MY2013/14.

Sunflower meal exports during October 2014-July 2015 grew by 76 percent compared to the corresponding period in MY2013/14 due to competitive prices and good export demand. Thus annual exports are likely to be over 50 percent above the previous season.

Sunflower Oil

MY2015/16

Sunflower oil output is forecast to decline by 6 percent across the EU due to lower crush. Imports should meet favorable food use demand and are projected to increase by 9 percent, likely sourced from Ukraine and maybe from Argentina in the second half of the season. Exports are projected to decline by 21 percent due to lower supply and tight regional competition in the Black Sea.

MY2014/15

Imports of sunflower oil during October 2014-July 2015 (World Trade Atlas) were 15 percent lower than imports in MY2013/14 as it slowed down in April-June due to declining stocks at exporters. Sunflower oil exports during October 2014- July 2015 were 21 percent higher than in the previous season due to good export demand (Turkey, South Africa, and Western Balkans). Similar to the market situation with sunflower meal, sunflower oil ending stocks were reduced by more than 20 percent compared to the previous season.

Related EU-28 and Country Reports:

Biofuels Sector Update|Biofuels Grain and Feed Oilseeds and Products|Sofia|Bulgaria|8/26/2015

The Bulgarian Renewable Energy Act (REA) established a national target of 16% of renewable energy in total energy consumption and 10% in transportation fuel consumption by 2020, and 6% share in the total reduction of GHG emissions based on sustainability criteria. Biofuel mandates lagged behind the goals and accounted for 5.7% in 2014. In July 2015, Bulgarian legislators postponed bioethanol mandates for 3 years and the current mandate of 7% will not be changed until 2018. Biodiesel producers p...

[Biofuels Sector Update_Sofia_Bulgaria_8-13-2015](#)

Portugal Biofuels Standing Report 2015|Biofuels Oilseeds and Products|Madrid|Portugal|8/13/2015

The Portuguese biofuels sector faces new challenges since 2015 as biodiesel production quotas have been phased-out and sustainability requirements have been fully enforced. At the same time, new opportunities exist for biofuel producers in the Portuguese market as consumption targets have been moved up from 5.5 to 7.5 percent in terms of energy and a 2.5 percent bioethanol specific-target has been introduced.

[Portugal Biofuels Standing Report 2015_Madrid_Portugal_7-27-2015](#)

Biofuels Market Outlook in Poland 2015|Biofuels Oilseeds and Products|Warsaw|Poland|8/11/2015

In 2014 Poland's total production amounted to 0.7 MMT of biodiesel and 0.14 MMT of bioethanol. For the last few years, imports of bioethanol from other EU countries increased significantly, while local production went down. There is a significant surplus of current domestic production capacity in both biodiesel and bioethanol markets in Poland and further investments in this area are not expected. For the year 2015, the National Indicative Target (NIT) for Poland was set at 7.1 percent. It will ...

[Biofuels Market Outlook in Poland 2015_Warsaw_Poland_8-5-2015](#)

Oilseeds Market Update|Oilseeds and Products Grain and Feed Biofuels|Vienna|EU-28|8/10/2015

This report provides EU-28 production, supply, and demand forecasts for major EU oilseeds, protein meals and related products.

[Oilseeds Market Update_Vienna_EU-28_8-5-2015](#)

Biofuels Annual 2015|Biofuels Oilseeds and Products Grain and Feed Agriculture in the Economy|Prague|Czech Republic|8/4/2015

The Czech Republic implemented the EU legislation and has set targets for greenhouse gas (GHG) savings and for the share of biofuels and renewable electricity in transportation on total consumption. Sufficient production capacities and feedstock should allow meeting of those targets.

[Biofuels Annual 2015 Prague Czech Republic 7-29-2015](#)

Planting Seed Market in Poland - Outlook 2015|Agricultural Situation Biotechnology - GE Plants and Animals Grain and Feed Oilseeds and Products Planting Seeds|Warsaw|Poland|8/4/2015

Poland is one of the major agricultural plant producers in the EU, with great potential for future planting seed market development. The current planting seed market value is very low and inadequate for Poland's agricultural productive potential. Sales of certified planting seed show a growing tendency in the last few years, but the dynamics of growth is very slow. Poland is a net importer of planting seeds. In the last five years the average planting seed imports value amounted to U.S. \$210 mil...

[Planting Seed Market in Poland - Outlook 2015 Warsaw Poland 7-30-2015](#)

Crop Update|Grain and Feed Oilseeds and Products|Prague|Czech Republic|7/27/2015

Dry weather with high temperatures resulted in slightly earlier start of grains and rapeseed harvest. Drought causes smaller grains and lower yields. MY2015/16 harvest is forecast to be average, with the sowing area remaining almost unchanged.

[Crop Update Prague Czech Republic 7-22-2015](#)

Sunflower Market Diversification and Development|Oilseeds and Products Product Brief|Sofia|Bulgaria|7/10/2015

Over the last several years, the Bulgarian oilseeds industry has invested in expanding capacities, diversifying and adding value to some of the major field crops. This trend has been most pronounced with the sunflower crop. While until recently Bulgaria was a net exporter of sunflower seeds, lately the country has increased its crushing capacity. The industry also invested in new processing businesses such as production of bakery sunflower seeds for human consumption. In 2015 Bulgaria may e...

[Sunflower Market Diversification and Development Sofia Bulgaria 7-6-2015](#)

Warm Spring Drives Down Spanish Winter Grains Harvest|Grain and Feed Oilseeds and Products|Madrid|Spain|7/1/2015

Good yields were expected for most of Spain's grain growing regions until early May when high temperatures and lack of precipitation significantly reduced harvest expectations. Spain's central plateau is the area most affected by the hot weather. The winter crop cycle had almost ended when the unusually high temperatures withered the grains in the South. Some Northern grain growing regions can still expect average yields thanks the milder prevailing temperatures and to rain during the first h...

[Warm Spring Drives Down Spanish Winter Grains Harvest Madrid Spain 6-22-2015](#)

Position Paper on the Future of Livestock Feeding |Biotechnology - GE Plants and Animals Biotechnology and Other New Production Technologies Oilseeds and Products Agriculture in the News Livestock and Products|Berlin|Germany|6/30/2015

The Federal Association of the German Retail Grocery Trade (BVLH) has adopted a position paper on the feeding of livestock. The paper says that "the vast majority of companies" would support genetically engineered (GE) free protein feed. BVLH represents all food retailers in Germany,

[Position Paper on the Future of Livestock Feeding Berlin Germany 6-5-2015](#)

Oilseeds and Products Annual 2015|Oilseeds and Products|Prague|Czech Republic|5/4/2015

Marketing years 2013/14 and 2014/15 were both record breaking: in MY2013/14 rapeseed area in the Czech Republic exceeded the threshold of 400,000 hectares, while in MY2014/15 the yield reaching almost 4 MT/HA resulted in record high rapeseed production of 1.54 million MT. Sunflower production has been declining because of its lowering profitability.

[Oilseeds and Products Annual 2015 Prague Czech Republic 4-28-2015](#)

Weather conditions impact Romanian oilseed crop|Oilseeds and Products|Bucharest|Romania|4/30/2015

Weather conditions impacted rapeseed planting in the fall of 2014 leading to poor emergence. Excessive moisture contributed further to plant deterioration. Part of the rapeseed area to be replanted will be covered by sunflower seeds MY 2015/16, which was otherwise expected to fall more significantly as a result of low returns last year. The upward trend in the soybean area is boosted by the recent Romanian Government decision to include soybean among the crops eligible for EU couple support. Rom...

[Weather conditions impact Romanian oilseed crop Bucharest Romania 4-29-2015](#)

Oilseeds and Products Sector Update|Oilseeds and Products|Sofia|Bulgaria|4/22/2015

The first tentative official data on 2014 crop production published in late March showed a higher than previously expected area and production of oilseeds in MY2014/15. Based on the new data, total oilseeds area in MY2014/15 is increased by 4% and total production by 12%. Recent dynamic development of the oilseeds sector outlines key new trends in MY2014/15 and MY2015/16 as follows: Declining rapeseeds area due to lower profitability, the ban on neonicotinoids and current less optimistic pr...

[Oilseeds and Products Sector Update_Sofia_Bulgaria_4-17-2015](#)

Poland - Rapeseed and Products Annual - Spring 2015|Oilseeds and Products Agricultural Situation Biofuels|Warsaw|Poland|4/21/2015

For marketing year (MY) 2015/16, planted area of rapeseed is expected to diminish 2.3 percent in response to declining rapeseed prices as some producers switch to grains. As of the first week of April, the rapeseed crop development was assessed well with good prospects for abundant harvest. Poland's total production of rapeseed for MY 2015/16 is forecast to decline by 7 percent to 3 million metric tons (MMT). FAS Warsaw is forecasting the lower production number than in last (record) 2014 year ...

[Poland - Rapeseed and Products Annual - Spring 2015_Warsaw_Poland_4-16-2015](#)

Select Decreasing Production of Oilseeds, Except for Soybeans|Oilseeds and Products|Vienna|EU-28|4/3/2015

Total EU-28 oilseeds production for marketing year (MY) 2015/16 is expected to decline by about 9 percent to 32 million metric tons (MMT). Following record yields in MY 2014/15 this is a result of lower and more average yields expectations and partially of reduced acreage. Rapeseed production is forecast to be more than 11 percent lower than in MY 2014/15 and may reach 21.3 MMT. Sunflower production is anticipated to be down by 5 percent at 8.5 MMT. Still at a relatively low level but increa...

[Oilseeds and Products Annual_Vienna_EU-28_3-31-2015](#)

French plan for protein crops 2014-2020|Oilseeds and Products|Paris|France|1/7/2015

In December 2014, the French Minister of Agriculture Stéphane Le Foll released a plan to increase the production of protein crops in France between 2014 and 2020. This plan mainly consists of direct subsidies to farmers that produce protein crops. It is expected to result in an increase in production in the short- to medium-term, which will probably lead to a decrease in soybean imports. However, protein crops are not competitive in France and, if subsidies are removed, production will rever...

[French plan for protein crops 2014-2020_Paris_France_1-5-2015](#)

Related Topics**2015|Biotechnology and Other New Production Technologies|Paris|EU-28|7/27/2015**

In the European Union, governments, the media, non-governmental organizations, consumers, and industry associations remain conflicted about the use of agricultural biotechnology. Acceptance varies widely across countries. A complex policy framework developed under pressure from anti-biotech activists has limited research, development, and production. The EU produces very few genetically engineered (GE) plants and animals but, with the growing adoption of biotechnology around the globe by lea...

[Agricultural Biotechnology Annual_Paris_EU-28_7-23-2015](#)

EU Biofuels Annual 2015|Biofuels|The Hague|EU-28|7/22/2015

On April 28, 2015, the European Parliament approved the reform of the RED, which includes a 7 percent cap on food crop based biofuels for the transport sector. The current blending of food crop based ethanol and biodiesel is estimated at respectively 3.3 and 4.3 percent. Further growth in the use of conventional biofuels will mainly depend on the successful introduction of the higher blends such as E10 and E85. But widespread use of these blends is hampered by the low fossil fuel prices and i...

[Biofuels Annual_The Hague_EU-28_7-15-2015](#)

Crop update - all eyes are on the weather|Grain and Feed|London|EU-28|7/22/2015

The grain harvest is now under way in most Member States. Following an extended period of dry weather across much of the EU28 in the spring, which continued and worsened into the early summer in the west, attention is focusing on the size and quality of the wheat and barley crops as well as the development of the corn crop. With the weather over the coming weeks remaining a key influencing factor, the total MY2015/16 EU28 grain crop is revised to just over 305 MMT, down nearly 21 MMT on the re...

[Crop update - all eyes are on the weather_London_EU-28_7-20-2015](#)

Biofuel Mandates in the EU by Member State|Biofuels Trade Policy Monitoring|Berlin|EU-28|7/16/2015

This report provides an overview on the biofuel use mandates in the various EU-28 member states.

[Biofuel Mandates in the EU by Member State_Berlin_EU-28_7-13-2015](#)

Select 2015|Grain and Feed|London|EU-28|4/10/2015

The outlook for the MY2015/16 EU28 grain crop is positive with another sizeable crop forecast, albeit down from the record volume achieved in MY2014/15. With the exception of some challenges in Romania and Bulgaria, winter crops benefitted from good planting conditions. A mild winter has seen crops develop well although recent conditions have been a little wet, notably in Hungary and its near neighbors. Spring planting is now under way, albeit subject to some weather-related delays in the sou...

[Grain and Feed Annual_London_EU-28_3-27-2015](#)

Plenty of opportunities for U.S. organics in the EU market|Beverages Coffee Dried Fruit Citrus Fresh Fruit Special Certification - Organic/Kosher/Halal Market Development Reports Product Brief Tree Nuts|The Hague|EU-28|2/11/2015

The organic arrangement between the U.S. and the EU in combination with growing demand for organic products in the EU creates opportunities for U.S. companies. Export opportunities are to be found in fresh produce, dried fruit and nuts, specialty grains and processed products.

[Plenty of opportunities for U.S. organics in the EU market_The Hague_EU-28_2-10-2015](#)

Biotechnology and Other New Production Technologies|Biotechnology and Other New Production Technologies|Paris|EU-28|1/13/2015

In the European Union (EU), governments, the media, non-governmental organizations, consumers, and industry associations remain conflicted about the use of agricultural biotechnology. Acceptance varies widely across countries. A complex policy framework developed under pressure from anti-biotech activists has limited research, development, and production. The EU produces very few genetically engineered (GE) plants and animals but, with the growing adoption of biotechnology around the globe b...

[Agricultural Biotechnology Annual_Paris_EU-28_1-9-2015](#)