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Oilseeds Crop Update - U.S. Soybean Exports to EU Threatened

Report Categories:

Oilseeds and Products

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Report Highlights:
The detection of yet-not-EU-approved biotech corn in shipments of soybean products from the U.S. seriously jeopardizes U.S. soybean shipments to the EU. Reports indicate that exporters and importers are taking actions to avoid the rejection of shipments. In combination with reduced availability of soybeans from Brazil and Argentina, this could pose a serious threat to sufficient availability of soybean products on the EU market in the coming months. Ultimately, the market will have to allocate if the problem is not solved. This could result in steep price increases and reduced imports and crush of soybeans. It remains unclear if the EU political machinery will be able to solve the problem in the short term. The issue will have to be watched closely in the next 6-8 months.

Rapeseed harvest is in full swing. The 2009/10 rapeseed production estimate is now 19.7, an increase of 0.5 MMT due to expected record yields in Germany and in France.

General Information:

Introduction

This report is an update to the EU-27 oilseeds annual report and 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.

<u>This report was a group effort of the following FAS analysts:</u>

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<u>Abbreviations used in this report</u>

Benelux	= Belgium, the Netherlands, and Luxembourg
CAP	= EU common agricultural policy
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)
HA	= Hectares
LLP	= Low-level-presence
MT	= Metric ton (1000 kg)
MMT	= Million metric tons
MS	= EU Member State(s)
MY	= Marketing year
U.S.	= The United States of America

The marketing years used in this report are:

July-June

Rapeseed complex

October -September

Soybean complex

Sunflower complex

Soybean Complex

Coordinator: Marie-Cecile Henard

MY 08/09:

EU-27 imports of soybeans were revised due to recently-published estimates. Lower-than-expected imports of soybeans in MY 08/09 are estimated to reduce crush, and subsequently soybean meal and oil production.

MY 09/10:

In the first half of MY 2009/10, EU-27 imports of soybeans are expected to decline, due to their reduced availability from Argentina and Brazil combined with findings of traces of a biotech corn event not yet approved in the EU (MON88017) and detected in samples of feed mixes containing soybean meal of U.S. origin. This will result in a tighter soybean and soybean products market than previously forecast. EU importers and operators are currently extremely concerned by this issue. There is currently a zero tolerance for EU-unapproved biotech products, even for products authorized in other countries or for products that have received a positive opinion from the European Food Safety Authority, as is the case for MON88017. Food and feed operators have no clear indication on whether and when EU authorities might re-evaluate this position, given the current summer break, transition between old and new European Commission, and general elections coming up in Germany.

Shorter supply and the unsolved biotech issue are expected to increase prices of soybeans, meals, and oil and therefore reduce their price-competitiveness in the EU market, at least in the short term. According to market reports, European importers of soybeans and soybean meal are currently restructuring their import programs. They are trying to avoid or reduce the risk that imports of soybeans or soybean meal will be rejected by European authorities because of detected traces of the yet unapproved corn event. Importers are already reporting the substitution of bean and meal shipments from the U.S. by South American origin product.

This unresolved situation carries the risk that with the start of the shipping season of U.S. commodity in September/October 2009, soybeans and meal will become short for the European livestock industry. To avoid this risk, the European authorities may either alter their zero-tolerance approach for un-approved biotech events or speed up the approval process for biotech events. The European food/feed industry is pushing the Commission and the EU member states to put the vote for the approval of the corn event on the agenda of the Minister Council for Agriculture on September 7, 2009. According to contacts in the industry and public authorities, the European Commission may submit a proposal on this for vote at the Scientific Committee on the Food Chain on September 29.

Reduced imports of soybeans are expected to result in lower soybean crush in the EU. The feed use of soybean meals is expected to decline, due to their higher prices. In addition, rapeseed meal use will increase because prices are likely to decline, due to the large EU rapeseed crop in 2009.

Lower soybean crush would also result in lower soybean oil production, reducing its use for processing into biodiesel. This will probably benefit rapeseed oil, given the new soybean-oil/rapeseed oil price-differential.

The PSD estimates are based on the following assumptions:
1) The biotech corn issue is not solved before the end of 2009 and results in significantly reduced soybean/soybean meal shipments from the United States to the EU from October 2009 through March 2010.
2) An average South American soybean crop in 2010 alleviates the tight availability of soybeans on the world market from March 2010 onwards.
3) EU importers are willing to pay a substantial premium for soybeans and soybean meal from non-U.S. sources in the first half of MY 2009/10.

EU-27 Soybean PSD

Commodity:	Soybeans (1000 ha / 1000 MT)								
Marketing Year	**MY 2007/08**			**MY 2008/09**			**MY 2009/10**		
Marketing Year Begin	**10/2007**			**10/2008**			**10/2009**		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Area	342	342	342	244	244	244	300	294	350
Beginning Stocks	1,118	1,118	1,118	814	817	817	507	630	630
Production	723	723	723	653	653	653	800	784	940
Extra EU27 imports	15,123	15,123	15,123	12,800	13,300	13,000	12,900	13,220	12,200
TOTAL SUPPLY	**16,964**	**16,964**	**16,964**	**14,267**	**14,770**	**14,470**	**14,207**	**14,634**	**13,770**
Extra EU27 exports	37	37	37	30	30	30	30	30	30
Crush	14,870	14,800	14,800	12,500	12,900	12,600	12,600	12,800	11,800
Food Use	115	110	110	110	110	110	110	110	110
Feed, Seed, Waste	1,128	1,200	1,200	1,120	1,100	1,100	1,020	1,100	1,100
TOTAL Use	16,113	16,110	16,110	13,730	14,110	13,810	13,730	14,010	13,010
Ending Stocks	814	817	817	507	630	630	447	594	730
TOTAL DISTRIBUTION	**16,964**	**16,964**	**16,964**	**14,267**	**14,770**	**14,470**	**14,207**	**14,634**	**13,770**

Source: FAS EU-27

EU-27 Soybean meal PSD

Commodity:	Soybean Meal (1000 MT)								
Marketing Year	**MY 2007/08**			**MY 2008/09**			**MY 2009/10**		
Marketing Year Begin	**10/2007**			**10/2008**			**10/2009**		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Crush	14,870	14,800	14,800	12,500	12,900	12,600	12,600	12,800	11,800
Extraction Rate	0.788	0.791	0.791	0.788	0.795	0.790	0.788	0.793	0.788
Beginning Stocks	859	859	859	1,065	1,199	1,199	392	1,007	407
Production	11,715	11,700	11,700	9,848	10,250	9,950	9,928	10,150	9,300
Extra EU27 imports	24,072	24,065	24,065	22,600	22,000	22,000	23,100	21,800	21,800
TOTAL SUPPLY	**36,646**	**36,624**	**36,624**	**33,513**	**33,449**	**33,149**	**33,420**	**32,957**	**31,507**
Extra EU25 exports	449	383	383	400	400	400	320	400	400
Industrial	10	10	10	10	10	10	10	10	10
Food Use	32	32	32	32	32	32	32	32	32
Feed, Seed, Waste	35,127	35,000	35,000	32,679	32,000	32,300	32,698	31,500	30,650
TOTAL Use	35,169	35,042	35,042	32,721	32,042	32,342	32,740	31,542	30,692
Ending Stocks	1,065	1,199	1,199	392	1,007	407	360	1,015	415
TOTAL DISTRIBUTION	**36,683**	**36,624**	**36,624**	**33,513**	**33,449**	**33,149**	**33,420**	**32,957**	**31,507**

Source: FAS EU-27

EU-27 Soybean oil PSD

Commodity:	Soybean Oil (1000 MT)								
Marketing Year	MY 2007/08			MY 2008/09			MY 2009/10		
Marketing Year Begin	10/2007			10/2008			10/2009		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Crush	14,870	14,800	14,800	12,500	12,900	12,600	13,295	12,800	11,800
Extraction Rate	0.179	0.179	0.179	0.180	0.180	0.179	0.171	0.180	0.178
Beginning Stocks	214	200	214	211	237	251	111	142	81
Production	2,667	2,650	2,650	2,249	2,325	2,250	2,267	2,310	2,100
Extra EU27 imports	1,040	1,040	1,040	850	900	900	800	1,100	1,100
TOTAL SUPPLY	**3,921**	**3,890**	**3,904**	**3,310**	**3,462**	**3,401**	**3,178**	**3,552**	**3,281**
Extra EU27 exports	333	333	333	300	250	250	170	250	200
Industrial	1,592	300	300	1,111	300	300	1,100	300	300
Biofuels	0	1,150	1,150	0	1,050	1,050	0	1,150	1,000
Food Use	1,655	1,700	1,700	1,658	1,600	1,600	1,653	1,600	1,600
Feed, Seed, Waste	130	170	170	130	120	120	130	120	120
TOTAL Use	3,377	3,320	3,320	2,899	3,070	3,070	2,883	3,170	3,020
Ending Stocks	211	237	251	111	142	81	125	132	61
TOTAL DISTRIBUTION	**3,921**	3,890	**3,904**	**3,310**	3,462	**3,401**	**3,178**	3,552	**3,281**

Source: FAS EU-27

Rapeseed Complex

Coordinator: Sabine Lieberz

Updated information about rapeseed plantings for MY 08/09 indicates that EU-27 rapeseed area is lower than originally forecast, yet still higher than in MY07/08. In contrast, production level is increased to 19.7 MMT. Harvest is still ongoing in most member states except for Hungary, where harvest was concluded by July 25. First reports about preliminary results indicate that yields are much better than forecast in Germany and France to the extent that they can compensate for lower than expected yields in some other member states (Hungary, Czech Republic, Slovakia, and the U.K.). Hungary suffered from a drought early in the season (March through May), while the Czech Republic, Slovakia, and the U.K. had the opposite problem of too much precipitation during spring and summer. Poor pollination in Romania resulted in pod-setting problems and lower yields. In contrast to the previous year, moderate temperatures and sufficient rainfall provided very good growing conditions in Germany and France that resulted in record yields.

Problems with an EU-unapproved biotech corn event in shipments of soybeans and soybean meal imported from the United States are expected to drive up rapeseed meal use in animal feed over previous forecasts. However, the room for increase is limited as rapeseed meal use has already been fairly high in recent years in some countries (for example Germany, France, and the Benelux), while prejudice against rapeseed meal seems to erode only slowly in other countries. The expected difficulties in soybean sourcing are also expected to prompt multi-feed oil mills to increase their crushing of rapeseed at the expense of soybeans. Despite the high EU rapeseed production, imports are expected to still be large but below the 2008/09 total. Imports from Canada are not expected to increase as crushers want to avoid biotech rapeseed varieties as these would require establishing separate production chains for biotech and no-biotech rapeseed varieties.

EU-27 Rapeseed PSD

Commodity:	Rapeseed (1000 HA / 1000 MT)								
Marketing Year	MY 2007/08			MY 2008/09			MY 2009/10		
MY Begin	07/2007			07/2008			07/2009		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Area	6,554	6,554	6,554	6,278	6,278	6,245	6,500	6,565	6,445
Beginning Stocks	1,441	1,441	1,441	961	1,139	1,139	1,853	1,600	1,625
Production	18,358	18,358	18,358	19,006	19,006	18,896	18,300	19,200	19,700
Extra EU27 imports	687	687	687	3,100	2,500	3,340	2,150	1,850	1,850
TOTAL SUPPLY	**20,486**	**20,486**	**20,486**	**23,067**	**22,645**	**23,375**	**22,303**	**22,650**	**23,175**
Extra EU27 exports	396	396	396	100	200	100	100	200	100
Crush	18,250	18,300	18,300	20,230	20,000	20,650	20,400	20,700	21,000
Food Use	0	0	0	0	0	0	0	0	0
Feed, Seed, Waste	879	651	651	884	845	1,000	885	750	750
TOTAL Use	19,129	18,951	18,951	21,114	20,845	21,650	21,285	21,450	21,750
Ending Stocks	961	1,139	1,139	1,853	1,600	1,625	918	1,000	1,325
TOTAL DISTRIBUTION	**20,486**	**20,486**	**20,486**	**23,067**	**22,645**	**23,375**	**22,303**	**22,650**	**23,175**

Source: FAS EU-27

EU-27 Rapeseed Meal PSD

Commodity:	Rapeseed Meal (1000 MT)								
Marketing Year	MY 2007/08			MY 2008/09			MY 2009/10		
MY Begin	07/2007			07/2008			07/2009		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Crush	18,250	18,300	18,300	20,230	20,000	20,650	20,400	20,700	21,000
Extraction Rate	0.575	0.574	0.574	0.575	0.575	0.564	0.576	0.575	0.571
Beginning Stocks	87	87	87	101	188	191	152	316	400
Production	10,500	10,500	10,500	11,639	11,500	11,640	11,744	11,900	12,000
Extra EU27 imports	109	106	109	150	150	155	150	150	150
TOTAL SUPPLY	**10,696**	**10,693**	**10,696**	**11,890**	**11,838**	**11,986**	**12,046**	**12,366**	**12,550**
Extra EU25 exports	182	182	182	180	190	160	200	200	160
Industrial	0	23	23	0	32	32	0	36	17
Food Use	0	0	0	0	0	0	0	0	0
Feed, Seed, Waste	10,413	10,300	10,300	11,558	11,300	11,394	11,741	11,850	12,003
TOTAL Use	10,413	10,323	10,323	11,558	11,332	11,426	11,741	11,886	12,020
Ending Stocks	101	188	191	152	316	400	105	280	370
TOTAL DISTRIBUTION	**10,696**	**10,693**	**10,696**	**11,890**	**11,838**	**11,986**	**12,046**	**12,366**	**12,550**

Source: FAS EU-27

EU-27 Rapeseed Oil PSD

Commodity:	Rapeseed oil (1000 MT)								
Marketing Year	MY 2007/08			MY 2008/09			MY 2009/10		
MY Begin	07/2007			07/2008			07/2009		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Crush	18,250	18,300	18,300	20,230	20,000	20,650	20,400	20,700	21,000
Extraction Rate	0.415	0.401	0.404	0.415	0.400	0.407	0.415	0.400	0.410
Beginning Stocks	211	211	211	171	298	299	234	328	329
Production	7,575	7,342	7,400	8,402	8,000	8,400	8,475	8,280	8,600
Extra EU27 imports	296	296	296	430	500	440	550	650	440
TOTAL SUPPLY	8,082	7,849	7,907	9,003	8,798	9,139	9,259	9,258	9,369
Extra EU27 exports	137	132	137	200	200	140	120	210	150
Industrial	4,919	445	445	5,631	500	500	6,333	510	510
Biofuels	0	4,717	4,765	0	5,450	5,750	0	6,100	6,100
Food Use	2,850	2,237	2,241	2,633	2,300	2,400	2,680	2,300	2,440
Feed, Seed, Waste	5	20	20	5	20	20	5	20	15
TOTAL Use	7,774	7,419	7,471	8,269	8,270	8,670	9,018	8,930	9,065
Ending Stocks	171	298	299	234	328	329	121	118	154
TOTAL DISTRIBUTION	8,082	7,849	7,907	8,703	8,798	9,139	9,259	9,258	9,369

Source: FAS EU-27

Sunflower Complex

Coordinators: Mila Boshnakova/Monica Dobrescu

Production

Spring and early summer droughts affected growing conditions in Romania, Hungary, Bulgaria and Spain negatively. However, abundant rainfalls in July increased yield expectations. EU-27 production estimate for MY2009/10 is still at 6.75 MMT which is 10.7% less than the previous year. Changes for planted area in MY2008/09 are due to new final official data from Romania. Production numbers for MY2008/09 have been lowered because of revised data from Romania and Spain.

Trade

Based on current trade data, EU27 imports of sun seeds in MY2008/09 exceeded initial expectations due to abundant Black Sea supply (mainly from Ukraine), attractive crush margins and thus increased demand. Due to accumulating stocks, imports of meal and oil are likely to slow down for the rest of the year.

Lower EU27 sunflower production in MY2009/10 will likely encourage relatively high level of imports but these will be below the previous marketing year's level. Exports in MY2008/09 were lower than expected. Higher local supply, slow demand from crushing industry and competition from Black Sea countries caused a reduction in exports to Turkey by 60% (June 08 to May 09). This trend is expected to continue in MY2009/10. Lower supply and continuing demand within the EU will also contribute to lower exports.

Distribution

Ample local and imported sunflower seed supply and attractive crush margins led to higher crush in the EU27 in the first half of MY2008/09. Almost all member states reported growth in crush. France, Germany, the Netherlands and Romania showed especially high increases. As a result, EU27 production of meal and oil increased. This boosted intra EU trade and consumption.

Sunflower meal

Estimates for production in MY2008/09 and MY2009/10 were revised upward based on expected higher crush in both years. Attractive prices in MY 08/09 lead to good export opportunities and favorable feed demand (both estimates were revised upward). Member states report higher demand for feed than previous estimates expected.

Sunflower oil

Higher crush in EU27 in MY2008/09 led to lower import demand for sun oil. Still, in Oct-May MY08/09, EU was the number one buyer of total sunflower oil from the top 3 exporters (Russia, Ukraine and Argentine). By July 2009, EU27 accumulated higher stocks of sun oil and meal than usual. Local consumption began to lag behind supply and exports were depressed. Reportedly, stocks in Rotterdam were at their highest levels in the last 2 years. Large sunflower oil stocks led to discounted prices compared to soybean and rapeseed oil. This trend will support consumption and exports until the end of the current marketing year.

Based on higher crush, the oil production estimate for MY09/10 was revised upwards. Due to higher stocks, imports of oil are expected to be lower than in the previous expectations.

EU-27 Sunflower Seeds PSD

Commodity:	Sunflowers (1000 ha, 1000 MT)								
Marketing Year	MY 2007/08			MY 2008/09			MY 2009/10		
MY Begin	10/2007			10/2008			10/2009		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Area	3,339	3,306	3,306	3,769	3,782	3,740	3,800	3,800	3,800
Beginning Stocks	630	630	630	239	252	252	825	608	602
Production	4,799	4,792	4,792	7,095	7,156	7,050	6,600	6,750	6,750
Extra EU27 imports	300	300	300	570	400	500	400	300	350
TOTAL SUPPLY	**5,729**	**5,722**	**5,722**	**7,904**	**7,808**	**7,802**	**7,825**	**7,658**	**7,702**
Extra EU27 exports	500	500	500	350	450	400	400	600	500
Crush	4,470	4,450	4,450	5,880	5,900	5,950	5,950	5,700	5,800
Food Use	220	220	220	295	250	250	250	250	250
Feed, Seed, Waste	300	300	300	554	600	600	490	600	600
TOTAL Use	4,990	4,970	4,970	6,729	6,750	6,800	6,690	6,550	6,650
Ending Stocks	239	252	252	825	608	602	735	508	552
TOTAL DISTRIBUTION	**5,729**	**5,722**	**5,722**	**7,904**	**7,808**	**7,802**	**7,825**	**7,658**	**7,702**

Source: FAS EU-27

EU-27 Sunflower Meal PSD

Commodity:	Sunflower Meal (1000 MT)								
Marketing Year	MY 2007/08			MY 2008/09			MY 2009/10		
MY Begin	10/2007			10/2008			10/2009		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Crush	4,470	4,450	4,450	5,880	5,900	5,950	5,950	5,700	5,800
Extraction Rate	0.546	0.528	0.528	0.546	0.534	0.533	0.546	0.526	0.522
Beginning Stocks	87	100	87	64	76	76	105	126	146
Production	2,440	2,350	2,350	3,210	3,150	3,170	3,248	3,000	3,030
Extra EU27 imports	1,548	1,548	1,548	1,700	1,600	1,750	1,370	1,000	1,200
TOTAL SUPPLY	**4,075**	3,998	**3,985**	**4,974**	4,826	**4,996**	**4,723**	4,126	**4,376**
Extra EU27 exports	49	49	49	100	100	100	80	150	100
Industrial	4	0	0	4	0	0	4	0	0
Food Use	0	0	0	0	0	0	0	0	0
Feed, Seed, Waste	3,958	3,860	3,860	4,765	4,600	4,750	4,559	3,900	4,150
TOTAL Use	3,962	3,860	3,860	4,769	4,600	4,750	4,563	3,900	4,150
Ending Stocks	64	76	76	105	126	146	80	76	126
TOTAL DISTRIBUTION	**4,075**	**3,985**	**3,985**	**4,974**	**4,826**	**4,996**	**4,723**	**4,126**	**4,376**

Source: FAS EU-27

EU-27 Sunflower Oil PSD

Commodity:	Sunflower Oil (in 1000 MT)								
Marketing Year	MY 2007/08			MY 2008/09			MY 2009/10		
MY Begin	10/2007			10/2008			10/2009		
	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)	USDA official	GAIN report E49039	Post Estimates (new)
Crush	4,470	4,450	4,450	5,880	5,900	5,950	5,950	5,700	5,800
Extraction Rate	0.397	0.420	0.420	0.397	0.420	0.417	0.397	0.421	0.419
Beginning Stocks	254	270	254	80	94	94	100	82	132
Production	1,773	1,870	1,870	2,335	2,480	2,480	2,363	2,400	2,430
Extra EU27 imports	1,063	1,063	1,063	1,040	1,000	1,000	1,020	1,100	1,050
TOTAL SUPPLY	**3,090**	**3,203**	**3,187**	**3,455**	**3,574**	**3,574**	**3,483**	**3,582**	**3,612**
Extra EU27 exports	109	109	109	120	125	125	120	125	125
Industrial	195	80	80	283	95	95	335	95	95
Biofuels	0	200	200	0	250	250	0	250	250
Food Use	2,704	2,684	2,684	2,950	3,000	2,950	2,931	3,000	2,950
Feed, Seed, Waste	2	20	20	2	22	22	0	24	24
TOTAL Use	2,901	2,984	2,984	3,235	3,367	3,317	3,266	3,369	3,319
Ending Stocks	80	94	94	100	82	132	97	88	168
TOTAL DISTRIBUTION	**3,090**	3,187	**3,187**	**3,455**	3,574	**3,574**	**3,483**	3,582	**3,612**

Source: FAS EU-27

Related Reports:

Report Number	Title	Date Released
E49039	EU-27 Oilseeds Annual Report http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Commodity%20Report_EU-27%20OILSEEDS%20_Berlin_Germany%20 EU-27_4-30-2009.pdf	4/30/2009

Related Topics:

Report Number	Title	Date Released
NL9014	EU-27 Biofuels Annual Report http://gain.fas.usda.gov/Recent%20GAIN%20Publications/General%20Report_The%20Hague_Netherlands-Germany%20EU-27_6-15-2009.pdf	6/15/2009