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## **Austria**

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### **Update - Expectations for Bumper Sunflower Crop**

**Report Categories:**

Oilseeds and Products

Grain and Feed

Biofuels

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**Report Highlights:**

This report provides EU-28 (EU-27 and Croatia, which joined the EU on July 1, 2013)  
production, supply, and demand forecasts for 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 (EU-27 and Croatia, which joined the EU on July 1, 2013). 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.

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The FAS EU-28 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-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

November-October

Olive Oil

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1. **Executive Summary:**

Coordinator: Roswitha Krautgartner / FAS Vienna

This report provides EU-28 (EU-27 and Croatia, which joined the EU on July 1, 2013) production, supply, and demand forecasts for the three major oilseeds (rapeseed, sunflower and soybeans), protein meals and related products.

**Production**

In MY 2013/14, overall production of EU-28 major oilseeds (rapeseed, sunflower and soybeans) is expected to grow by 9.8 percent compared to the previous year and will reach some 30.1 MMT. This is due to increased acreage of all three major oilseeds and to good yields. The most significant increase can be seen in this year's sunflower crop. Planted area of sunflower seeds in the European Union increased by 1.4 percent. Significant increases compared to the previous estimate occurred mainly in France, Spain and Hungary. Together with favorable weather conditions, expectations for total EU-28 sunflower production are high at 8.3 MMT (+ 18.6 percent year on year). EU domestic rapeseed production in MY2013/14 is also expected to increase to 20.7 MMT, mainly due to higher production in Germany, Poland, Romania and Hungary, and a record crop in the Czech Republic. The main reason for higher production is an increase in acreage. However, production in France and the U.K., two of the top European producers, decreased substantially. While still at a relatively low level, EU soybean production is expected to increase in MY2013/14 to 1.1 MMT, mainly due to higher production in Italy and Romania. Croatia a new EU member state, contributes to 11 percent of total EU production in this MY.

## Consumption and Trade

Total EU-28 consumption of major oilseeds meals (rapeseed, sunflower and soybeans) in feed is forecast to remain almost flat in MY 2013/14 (+ 0.4 percent) compared to the previous MY and will reach about 47.6 MMT. A positive factor for the use of meals is the anticipated increase of compound feed in the livestock sector. High availability and competitive prices will favor sunflower meal to some extent. Despite ample supplies in South America in MY 2012/13, EU imports of soybeans and soybean meal are significantly down due to shipping delays and logistical issues. Exceptionally high imports from the United States could not make up for reduced imports from South America. Low availability and high prices for soybean meal favored a stronger use of rapeseed meal in animal feed rations. In MY 2013/14 imports of soybean meal are expected to be almost back to normal at 19.7 MMT. High availability and competitive prices of rapeseed meal favor its use, especially on dairy farms through the beginning of MY 2013/14. Abundant supplies of sunflower seed in the EU and the arrival of the new soybean crop on the world market will change the situation later in the season. A major factor for the European rapeseed market is demand from the European biodiesel industry, which is declining as palm oil, used cooking oil, and other substitutes become more price competitive. In total, it is expected that the EU rapeseed crush will be slightly lower in MY 2013/14 and imports of rapeseed are expected to decrease since there is higher availability of domestic rapeseed.

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

Coordinator: Roswitha Krautgartner / FAS Vienna

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

Area	2011	2012	2013e
Rapeseed	6,745	6,215	6,650
Sunflower	4,280	4,300	4,360
Soybeans	445	422	458
Total	11,470	10,937	11,468

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	2011	2012	2013e
Rapeseed	19,240	19,450	20,700
Sunflower	8,400	7,000	8,300
Soybeans	1,220	948	1,088
Total	28,860	27,398	30,088

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 2011/12	MY 2012/13e	MY 2013/14f
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Rapeseed	21,900	22,500	22,300
Soybeans	11,070	11,270	11,270
Sunflower	7,000	6,400	7,000
Total	39,970	40,170	40,570

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 2011/12	MY 2012/13e	MY 2013/14f
Soybeans	28,431	27,600	28,000
Rapeseed	12,250	12,750	12,500
Sunflower	7,150	7,050	7,100
Total	47,831	47,400	47,600

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 2011/12	MY 2012/13e	MY 2013/14f
Rapeseed Oil	2,350	2,300	2,300
Soybean Oil	1,090	1,100	1,050
Sunflower Oil	3,320	3,300	3,400
Total Oils	6,760	6,700	6,750

e= estimate, f = forecast

Source: FAS EU-28

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

Biofuels	MY 2011/12	MY 2012/13e	MY 2013/14f
Feedstock/Rape Oil	6,450	6,300	6,200
Feedstock/Soy Oil	500	400	450
Feedstock/Sun Oil	180	180	190
Total	7,130	6,880	6,840

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 2011/12	MY 2012/13e	MY 2013/14f
Rape Oil	600	500	500
Soy Oil	200	190	200
Sunflower Oil	70	70	70
Total	870	760	770

e= estimate, f = forecast

Source: FAS EU-28

### 3. Soybean Complex

Coordinator: Marie-Cecile Henard / FAS Paris

PS&Ds have been revised according to the most recent data available from the Global Trade Atlas

(June 2013), which provide imports and exports for the first 9 months of MY 2012/13; recent harvest and crush estimates from producing countries; and now total EU-28 data, i.e., EU-27 and Croatia, which joined the EU on July 1, 2013.

Oilseed, Soybean EU-28	2011/2012		2012/2013		2013/2014	
	Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	530	445	480	422	530	458
Area Harvested	445	445	426	422	450	458
Beginning Stocks	564	564	452	1,094	250	1,332
Production	1,220	1,220	1,003	948	1,150	1,088
MY Imports	11,957	12,120	12,250	12,300	12,100	12,000
MY Imp. from U.S.	1,424	1,404	3,200	3,200	2,000	3,000
MY Imp. from EU	0	0	0	0	0	0
Total Supply	13,741	13,904	13,705	14,342	13,500	14,420
MY Exports	55	55	80	55	80	55
MY Exp. to EU	0	0	0	0	0	0
Crush	12,245	11,070	12,470	11,270	12,230	11,270
Food Use Dom. Cons.	120	150	120	150	120	150
Feed Waste Dom. Cons.	869	1,535	785	1,535	800	1,540
Total Dom. Cons.	13,234	12,755	13,375	12,955	13,150	12,960
Ending Stocks	452	1,094	250	1,332	270	1,405
Total Distribution	13,741	13,904	13,705	14,342	13,500	14,420

1000 HA, 1000 MT

Meal, Soybean EU-28	2011/2012		2012/2013		2013/2014	
	Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	12,245	11,070	12,470	11,270	12,230	11,270
Extr. Rate, 999.9999	1	1	1	1	1	1
Beginning Stocks	509	509	278	831	80	430
Production	9,674	8,715	10,020	8,821	9,826	8,800
MY Imports	20,939	20,954	18,100	19,000	20,100	19,700
MY Imp. from U.S.	680	442	1,200	1,500	400	500
MY Imp. from EU	0	0	0	0	0	0
Total Supply	31,122	30,178	28,398	28,652	30,006	28,930
MY Exports	884	874	650	580	700	580
MY Exp. to EU	0	0	0	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.	29,918	28,431	27,626	27,600	28,890	28,000
Total Dom. Cons.	29,960	28,473	27,668	27,642	28,932	28,042
Ending Stocks	278	831	80	430	374	308
Total Distribution	31,122	30,178	28,398	28,652	30,006	28,930

1000 MT, PERCENT

Oil, Soybean EU-28	2011/2012		2012/2013		2013/2014	
	Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	12,245	11,070	12,470	11,270	12,230	11,270
Extr. Rate, 999.9999	0	0	0	0	0	0
Beginning Stocks	266	266	123	157	98	117
Production	2,226	2,096	2,267	2,200	2,220	2,200
MY Imports	367	383	300	300	300	350
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	2,859	2,745	2,690	2,657	2,618	2,667

<b>MY Exports</b>	748	748	850	800	700	710
<b>MY Exp. to EU</b>	0	0	0	0	0	0
<b>Industrial Dom. Cons.</b>	880	700	800	590	820	650
<b>Food Use Dom. Cons.</b>	1,040	1,090	882	1,100	890	1,050
<b>Feed Waste Dom. Cons.</b>	68	50	60	50	60	50
-	0	0	0	0	0	0
<b>Total Dom. Cons.</b>	1,988	1,840	1,742	1,740	1,770	1,750
<b>Ending Stocks</b>	123	157	98	117	148	207
<b>Total Distribution</b>	2,859	2,745	2,690	2,657	2,618	2,667
1000 MT, PERCENT						

## MY 2013/14

EU domestic production is expected to increase to 1.1 million MT, mainly due to higher production in Italy and Romania, two leading producers in Europe. Note that Croatia, the new EU Member State, is a producer of soybeans, with 11 percent of total EU production in MY 2013/14. It is now the EU's third largest producer of soybeans after Italy (45 percent) and Romania (13 percent).

The forecast is for lower EU imports of soybeans and higher imports of soybean meal in MY 2013/14, i.e., going back to more a traditional situation from the abnormal trade conditions in MY 2012/13. The feed use of soybean meal is expected to be favored by lower prices following two years of abnormally high prices that have disadvantaged soybean meal to the benefit of other meals in animal feed rations.

## MY 2012/13

### Soybeans:

Lower EU imports of soybean meal during the first nine months of MY 2012/13 resulted in higher imports of soybeans: a 1.5 percent increase in EU imports of soybeans is expected in full MY 2012/13 to 12.3 million MT. U.S. soybeans specifically benefited from this trend, due to their availability and good quality for EU feed compounders. EU imports of soybeans from the United States more than doubled during the first nine months of MY 2012/13 to 2.9 million MT, becoming the EU's second largest supplier of soybeans to the EU after Brazil. During the same period, EU imports of soybeans from Ukraine also increased, but more moderately, to 800,000 MT, and Ukraine remained the EU's fifth largest supplier of soybeans, after Brazil, the U.S., Paraguay, and Canada.

Higher EU soybean imports are expected to result in increased crush to 11.3 million MT. Higher crush is specifically taking place in Spain and Germany, two leading EU soybean crushers. Higher imports of soybeans are also favored by the higher crushing capacity in Romania.

### Soybean Meal:

The main driver for the soybean complex in the EU is the animal feed demand for soybean meal, which is the preferred source of protein to feed livestock and poultry in Europe. Despite ample supplies in South America, EU imports during the first nine months of MY 2012/13 were 24 percent lower than in the same period of the previous year. Lower EU imports result from shipping delays and logistics issues at Brazilian ports. EU imports of soybean meal from Brazil and Argentina declined by 21 and 47 percent, respectively, but these two countries remained the EU's dominate suppliers of soybean meal. As a result of these logistics issues, world soybean prices remained abnormally high and shipments of

soybean meal were limited from South America. A faster pace of EU imports in the remaining months of MY 2012/13 is not expected to fully make up for the slow pace in the first part of the year. Consequently, EU imports are expected to decline by almost 10 percent in MY 2012/13 to 19 million MT.

At the same time, EU imports of soybean meal increased from the United States (becoming the EU's third largest supplier of soybean meal to the EU) and India (fourth supplier), but not enough to compensate the decline in shipments from South America. During the first nine months of MY 2012/13, EU imports of soybean meal from the United States were up fourfold from the previous year, to 1.4 million MT.

Feed use of soybean meal is expected to decline by three percent to 27.6 million MT in MY 2012/13, driven by lower imports of soybean meal, and despite higher soybean crush.

### Soybean Oil:

Higher soybean crush in MY 2012/13 is estimated to result in higher soybean oil production, and therefore reduced imports. During the first nine months of MY 2012/13, EU imports of soybean oil were almost 40 percent down. Shipments from Russia more the most affected by this downward trend.

The EU remains a net exporter of soybean oil in MY2012/13, with an expanding positive trade balance, while the EU used to be a net importer until MY 2010/11. As a result of the implementation of the Renewable Energy Directive, soybean oil became more difficult to use as a feedstock for the biodiesel industry. EU exports in MY 2012/13 are estimated to increase to 800,000 MT, mainly due to booming exports to Algeria and Morocco, especially from Germany and Spain. The increase in soybean oil exports is compensating the reduction in use for biofuels.

## 4. Rapeseed Complex

Coordinator: Leif Erik Rehder / FAS Berlin

PSDs have been revised according to the most recent data available from the Global Trade Atlas (June 2013), which provide imports and exports for MY 2012/13; recent harvest and crush estimates from producing countries; and now total EU-28 data, i.e., EU-27 and Croatia, which joined the EU on July 1, 2013.

Oilseed, Rapeseed EU-28	2011/2012		2012/2013		2013/2014	
	Market Year Begin: Jul 2011		Market Year Begin: Jul 2012		Market Year Begin: Jul 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	7,000	0	6,900		7,000	
Area Harvested	6,717	6,745	6,251	6,215	6,650	6,650
Beginning Stocks	1,843	1,843	2,193	1,971	1,162	1,367
Production	19,226	19,240	19,215	19,450	20,700	20,700
MY Imports	3,762	3,762	3,386	3,386	3,300	2,800
MY Imp. from U.S.	0	0	0		0	
MY Imp. from EU	0	0	0		0	
Total Supply	24,831	24,845	24,794	24,807	25,162	24,867
MY Exports	140	124	97	90	200	100
MY Exp. to EU	0	0	0		0	
Crush	21,610	21,900	22,680	22,500	22,670	22,300
Food Use Dom. Cons.	0	0	0		0	
Feed Waste Dom. Cons.	888	850	855	850	860	850

<b>Total Dom. Cons.</b>	22,498	22,750	23,535	23,350	23,530	23,150
<b>Ending Stocks</b>	2,193	1,971	1,162	1,367	1,432	1,617
<b>Total Distribution</b>	24,831	24,845	24,794	24,807	25,162	24,867

1000 HA, 1000 MT

Meal, Rapeseed EU-28	2011/2012		2012/2013		2013/2014	
	Market Year Begin: Jul 2011		Market Year Begin: Jul 2012		Market Year Begin: Jul 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b>	21,610	21,900	22,680	22,500	22,670	22,300
<b>Extr. Rate, 999.9999</b>	1	1	1	1	1	1
<b>Beginning Stocks</b>	118	118	130	103	75	85
<b>Production</b>	12,441	12,300	13,057	12,600	13,051	12,400
<b>MY Imports</b>	231	228	413	410	250	400
<b>MY Imp. from U.S.</b>	0	0	0	0	0	0
<b>MY Imp. from EU</b>	0	0	0	0	0	0
<b>Total Supply</b>	12,790	12,646	13,600	13,113	13,376	12,885
<b>MY Exports</b>	293	293	280	278	220	300
<b>MY Exp. to EU</b>	0	0	0	0	0	0
<b>Industrial Dom. Cons.</b>	0	0	0	0	0	0
<b>Food Use Dom. Cons.</b>	0	0	0	0	0	0
<b>Feed Waste Dom. Cons.</b>	12,367	12,250	13,245	12,750	13,020	12,500
<b>Total Dom. Cons.</b>	12,367	12,250	13,245	12,750	13,020	12,500
<b>Ending Stocks</b>	130	103	75	85	136	85
<b>Total Distribution</b>	12,790	12,646	13,600	13,113	13,376	12,885

1000 MT, PERCENT

Oil, Rapeseed EU-28	2011/2012		2012/2013		2013/2014	
	Market Year Begin: Jul 2011		Market Year Begin: Jul 2012		Market Year Begin: Jul 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b>	21,610	21,900	22,680	22,500	22,670	22,300
<b>Extr. Rate, 999.9999</b>	0	0	0	0	0	0
<b>Beginning Stocks</b>	124	124	156	198	96	178
<b>Production</b>	8,980	9,170	9,424	9,400	9,421	9,300
<b>MY Imports</b>	605	599	216	204	300	200
<b>MY Imp. from U.S.</b>	15	39	15	0	15	0
<b>MY Imp. from EU</b>	0	0	0	0	0	0
<b>Total Supply</b>	9,709	9,893	9,796	9,802	9,817	9,678
<b>MY Exports</b>	246	245	475	474	300	350
<b>MY Exp. to EU</b>	0	0	0	0	0	0
<b>Industrial Dom. Cons.</b>	7,000	7,050	6,810	6,800	6,850	6,700
<b>Food Use Dom. Cons.</b>	2,302	2,350	2,410	2,300	2,400	2,300
<b>Feed Waste Dom. Cons.</b>	5	50	5	50	5	50
<b>Total Dom. Cons.</b>	9,307	9,450	9,225	9,150	9,255	9,050
<b>Ending Stocks</b>	156	198	96	178	262	278
<b>Total Distribution</b>	9,709	9,893	9,796	9,802	9,817	9,678

1000 MT, PERCENT

## MY 2013/14

EU domestic rapeseed production is expected to increase to 20.7 million MT, mainly due to higher production in Germany (+0.9 MMT), Poland (+0.6 MMT), Romania (+0.5 MMT) and Hungary (+0.1 MMT), and a record crop in the Czech Republic (+0.2 MMT). The main reasons for higher production are an increase in acreage and, especially in some Eastern European countries, higher yields. However, production in France (-0.6 MMT) and the U.K. (-0.5 MMT), two of the top European

producers, decreased substantially.

There are different factors that will drive the European rapeseed market in MY 2013/14. At the beginning of the season, high availability of domestic rapeseed characterizes the market. Competitive prices for rapeseed meal will fuel the use in feed, especially on dairy farms. The abundant supply of sunflower seed in the EU and the arrival of the new soybean crop on the world market will change the situation later in the season. Thus, EU rapeseed meal consumption is expected to decrease slightly compared to the previous season. Another factor that will drive the European rapeseed market is the weak demand by the European biodiesel industry for rapeseed oil. Furthermore, rapeseed is also competing with palm oil, waste cooking oils and biodiesel imports. However, China, Singapore, and others have emerged as major importers of rapeseed oil over the last MY. However, it's not sure if demand from these markets remains stable since average contract prices were low. In total, it is expected that EU rapeseed crush will be slightly lower in MY 2013/14 and imports of rapeseed are expected to decrease since there is higher availability of domestic rapeseed. Due to a good crop, the Ukraine is again expected to become the largest supplier to the EU.

### **MY 2012/13**

#### **Rapeseed:**

Lower domestic production of rapeseed in the European Union resulted in imports of nearly 3.4 million MT with Australia (2 MMT) and Ukraine (1 MMT) being the major suppliers. However, there was also a remarkable increase in shipments from Argentina, which became the number three supplier. In contrast, imports from Canada dropped by nearly 90% since production in Canada derives mainly from genetically engineered varieties. Crush was revised upwards due to higher than expected crush in Hungary, Germany, and France.

#### **Rapeseed Meal:**

The popularity of rapeseed meal for animal feed varies among EU countries. Its use is most pronounced in countries that have a long rapeseed crushing history and high dairy production like Germany, France, the Benelux and the UK. Rapeseed meal production is following the revised crush numbers and was also increased slightly. Imports are higher than expected with Kazakhstan and Belarus becoming large suppliers like Russia and Canada. Feed use of rapeseed meal is expected to increase by four percent to 12.75 million MT in MY 2012/13, driven by higher crush and imports of rapeseed meal and by good price competitiveness relative to soybean meal.

#### **Rapeseed Oil:**

Higher rapeseed crush in MY 2012/13 is estimated to result in higher rapeseed oil production, and therefore reduced imports. In MY 2012/13 the EU imported just a third of the volume it imported in MY 11/12. Shipments from the United Arab Emirates, Canada, and the U.S. were the most affected by this downward trend. Whereas the U.S. once shipped nearly 100,000 MT of rapeseed oil, the volume came down to zero in MY 2012/13. Main reason was the weak demand by the European biodiesel sector. The EU nearly doubled the exports of rapeseed oil in MY12/13 with Norway and China as the key destinations. China has emerged as a new market by importing now close to 200,000 MT. The increase in rapeseed oil exports offset the reduction in use for biofuels.

## **5. Sunflower Complex**

Coordinator: Mila Boshnakova / FAS Sofia and Monica Dobrescu / FAS Bucharest

PSDs have been revised according to the most recent data available from the Global Trade Atlas (June 2013), which provide imports and exports for MY 2012/13; recent harvest and crush estimates from producing countries; and now total EU-28 data, i.e., EU-27 and Croatia, which joined the EU on July 1, 2013.

Oilseed, Sunflowerseed 28	EU-	2011/2012		2012/2013		2013/2014	
		Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013	
		USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted		0	0	0		0	
Area Harvested		4,274	4,280	4,290	4,300	4,350	4,360
Beginning Stocks		275	275	592	658	192	373
Production		8,456	8,400	6,999	7,000	8,350	8,300
MY Imports		282	282	200	215	200	210
MY Imp. from U.S.		40		50		0	
MY Imp. from EU		0		0		0	
Total Supply		9,013	8,957	7,791	7,873	8,742	8,883
MY Exports		637	559	390	410	600	560
MY Exp. to EU		0		0		0	
Crush		7,004	7,000	6,536	6,400	6,977	7,000
Food Use Dom. Cons.		290	290	270	270	270	280
Feed Waste Dom. Cons.		490	450	403	420	424	440
Total Dom. Cons.		7,784	7,740	7,209	7,090	7,671	7,720
Ending Stocks		592	658	192	373	471	603
Total Distribution		9,013	8,957	7,791	7,873	8,742	8,883
1000 HA, 1000 MT							

Meal, Sunflowerseed 28	EU-	2011/2012		2012/2013		2013/2014	
		Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013	
		USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush		7,004	7,000	6,536	6,400	6,977	7,000
Extr. Rate, 999.9999		1.	0.5286	1.	0.5313	0.5422	0.529
Beginning Stocks		296	296	610	539	107	379
Production		3,798	3,700	3,546	3,400	3,783	3,700
MY Imports		3,858	3,827	3,833	3,600	3,985	3,700
MY Imp. from U.S.		0		0		0	
MY Imp. from EU		0		0		0	
Total Supply		7,952	7,823	7,989	7,539	7,875	7,779
MY Exports		134	134	100	110	100	140
MY Exp. to EU		0		0		0	
Industrial Dom. Cons.		0		0		0	
Food Use Dom. Cons.		0		0		0	
Feed Waste Dom. Cons.		7,208	7,150	7,782	7,050	7,675	7,100
Total Dom. Cons.		7,208	7,150	7,782	7,050	7,675	7,100
Ending Stocks		610	539	107	379	100	539
Total Distribution		7,952	7,823	7,989	7,539	7,875	7,779
1000 MT, PERCENT							

Oil, Sunflowerseed 28	EU-		2011/2012		2012/2013		2013/2014	
			Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	7,004	7,000	6,536	6,400	6,977	7,000		
Extr. Rate, 999.9999	0.	0.4171	0.	0.4141	0.	0.4143		
Beginning Stocks	156	156	175	241	92	163		
Production	2,937	2,920	2,740	2,650	2,925	2,900		
MY Imports	990	960	1,100	1,050	1,230	1,100		
MY Imp. from U.S.	0		0		0			
MY Imp. from EU	0		0		0			
Total Supply	4,083	4,036	4,015	3,941	4,247	4,163		
MY Exports	210	205	200	210	185	185		
MY Exp. to EU	0		0		0			
Industrial Dom. Cons.	230	250	230	250	250	260		
Food Use Dom. Cons.	3,465	3,320	3,490	3,300	3,535	3,400		
Feed Waste Dom. Cons.	3	20	3	18	3	20		
Total Dom. Cons.	3,698	3,590	3,723	3,568	3,788	3,680		
Ending Stocks	175	241	92	163	274	298		
Total Distribution	4,083	4,036	4,015	3,941	4,247	4,163		
1000 MT, PERCENT								

## Sunflower Seeds

### MY 2013/14

Estimated EU-28 sunflower seed planted area have been increased mainly due to increases in France (7 percent) , Spain (4 percent) and Hungary (6 percent). Favorable weather conditions have led to very good yields at EU level, which in conjunction with the planted area expansion, resulted in expectations for a bumper crop of 8.3 Million MT. Total growth in production compared to last year is 1.3 MMT and close to record level from MY 2011/12.

Harvest started two weeks earlier than normal in Southern Europe due to favorable weather. The highest production increases compared to the previous estimates are reported in Romania (20 percent) and France (4 percent), while Hungary and Bulgaria maintained their previous estimates although these countries also see production growth compared to MY 2012/13 (1 and 14 percents, respectively). Reportedly, seeds quality (oil content) is very good. Several Member states (Austria, Spain) reported that hot and dry period in July- August resulted in crop stress and affected the yields to a certain extent. The production cuts resulting from unfavorable factors in these member states were offset by strong crops in other member states.

Two other major world sunflower seeds players, Ukraine and Russia, expect a rebound in their production and Black Sea region supplies will be abundant. Under these conditions, seeds prices are expected to decline, adding more pressure on the EU producers.

Sunflower seed imports were adjusted lower, since there will be plenty of product available internally.

The forecast for the sunflower seed crush is for a return to the level of MY 2011/12, about 7 MMT, which is 9 percent higher than MY 2012/13. Member States which revised their initial crush estimates upward are France, Romania and Portugal, while Austria, Italy and United Kingdom expect a slightly lower crush level. This year's improved crop will allow for stocks to be replenished through the end of

MY 13/14.

### **MY 2012/13**

Planted area and production are revised up slightly for MY 2012/13. Seed import figures were adjusted down reflecting a lower than anticipated pace of imports according to the GTA data. This is due to a higher internal availability. The crush estimate was marginally increased and remains about 9 percent lower than the previous marketing year.

### **Sunflower Meal**

#### **MY 2013/14**

Sunflower meal production is forecast to grow 0.3 million MT as a result of a higher crush.

Sunflower meal will again be competitive in MY13/14 and therefore demand and consumption are likely to expand. Prices of sunflower seeds and related products (meal, oil) continued their downward trend and are being driven by positive production forecasts. Crushing margins are attractive. Nevertheless, competition from other feed meals (soybeans and rapeseeds) remains strong.

Despite the larger EU crush, Black Sea region sunflower meal availability will stimulate import demand, which is forecast to grow. Ukraine, Russia and Argentina are major sunflower meal suppliers to the EU. Export figures were adjusted upward slightly. At the member state level, higher sunflower meal availability at competitive prices will result in growth in the usage rate in Romania, United Kingdom and Portugal, while Poland, Hungary and Austria forecast lower sunflower meal feed use, compared to their previous estimates.

#### **MY 2012/13**

The upward crush revision is reflected in a higher sunflower meal production. On the other hand, sunflower meal competitiveness versus other oil meals has stimulated the import demand. According to the GTA data, during the first 9 months of the MY, about 2.7 MMT entered the EU, mainly supplied by Russia and Ukraine. Import figure was revised up to 3.6 MMT until the end of the MY, lower than the USDA official estimate. The volume is reflected in higher feed utilization compared to the previous estimates.

### **Sunflower Oil**

#### **MY 2013/14**

The higher crush will translate larger sunflower oil supplies. Falling sunflower oil prices are expected to stabilize though remaining very competitive in comparison with other types of vegetable oils. In contrast to initial estimates, sunflower oil food demand is now expected to be stronger in several member states (France, Portugal, Spain and United Kingdom). No major changes are expected for industrial uses.

### **Related EU-27, EU-28 and Country Reports:**

**Protesters block major soybean port|Biotechnology - GE Plants and Animals Oilseeds and Products Agricultural Situation|Berlin|Germany|8/26/2013**

40 Protesters blocked the entrance of the port of Brake on Tuesday 20th of August to demonstrate against the import of biotech soybeans. The port of Brake is one of Germany's main entry points for soybean imports. Agriculture plays its role in the campaigns for the federal election in September since the Green party campaign against Large-Scale Agricultural Production and is openly advocating not just for an end on biotech cultivation in Europe but also for a ban on imports of biotech products.

[Protesters block major soybean port Berlin Germany 8-21-2013](#)

**Record Breaking Rapeseed and Good Grains Crop in the Czech Republic|Grain and Feed Oilseeds and Products Agriculture in the News|Prague|Czech Republic|7/31/2013**

Despite recent flooding, the first estimates of 2013 Czech crops are very positive. Grains overwintered well. Higher yields will generate nearly 16 percent increase in total production on slightly smaller total planted area. Total grains production is forecast to reach 6.5 MMT. The 2013 rapeseed crop keeps pushing Czech agronomical limits with the largest sown area, and an increasing yield which should generate a record breaking rapeseed harvest of 1.3 MMT.

[Record Breaking Rapeseed and Good Grains Crop in the Czech Republic Prague Czech Republic 7-23-2013](#)

**Below Average Temperatures in late Spring Help Spanish Cereal Crop |Grain and Feed Oilseeds and Products|Madrid|Spain|7/10/2013**

Good yields are expected for most of Spain's grain growing regions. Official and industry sources concur in the production increase compared to last season. Higher production in Spain along with increased pasture availability will diminish feed grains dependency on imports and boost the use of domestically grown grains at the expenses of imports. Nevertheless, there could be import opportunities in those market niches where higher quality specifications are required.

[Below Average Temperatures in late Spring Help Spanish Cereal Crop Madrid Spain 7-2-2013](#)

**Grains and Oilseeds Update|Grain and Feed Oilseeds and Products|Sofia|Bulgaria|6/3/2013**

Bulgarian farmers completed spring planting activity by the beginning of May. Area planted under corn is higher than initially expected. Unusually hot and dry weather the latter half of April into May is having an adverse impact on winter crops, mainly rapeseeds crop. Some farmers have already begun to re-seed fields with spring varieties. Wheat and rapeseed crops average yields are expected to decline moderately absent significant rainfall in the near-term. Exports of grains and oilseeds...

[Grains and Oilseeds Update Sofia Bulgaria 5-28-2013](#)

**Ample Soybean World Supplies to Boost EU-27 Soybean Meal Consumption|Oilseeds and Products|Vienna|EU-27|5/7/2013**

Expectations for a total EU-27 oilseeds production in MY 2013/14 are for an 8.6 percent increase reaching 29.7 MMT. Compared to the previous year rapeseed, sunflower and soybean production is forecast to grow. The increase is through higher acreage of rapeseed especially in Germany and Eastern European countries and normal yields of sunflower which were down in

MY 2012/13 due to drought in major producing countries. Ample world supplies of soybeans and soybean meal in combination with a growi...

[Oilseeds and Products Annual Vienna EU-27 4-5-2013](#)

**Grains and Oilseeds Market Update|Oilseeds and Products Grain and Feed|Sofia|Bulgaria|5/3/2013**

Following 2012 fall draught and above normal temperatures, the winter was mild with snowfall around average. No winterkill damage was reported. Soil moisture levels have been replenished as a result of good rainfall in late March and first half of April. This provided not only such needed moisture for the fall crops but also favorable conditions for the spring planting. The weather in the second half of April is warm and dry and farmers quickly try to plant as much as they can to catch up th...

[Grains and Oilseeds Market Update Sofia Bulgaria 4-30-2013](#)

**Arable Crops Hold Potential despite Record Precipitation|Agricultural Situation Grain and Feed Oilseeds and Products Sugar Wine Cotton and Products|Madrid|Spain|5/2/2013**

Heavy precipitation in the winter and early spring throughout Spain is a dramatic contrast to the long drought faced across the country during the same period only one year ago. Continued rains and flooded conditions, especially in the riversides, have already caused losses in some orchards and fruit groves. Nevertheless, other crops such as grains and sunflower still hold good yield potential, provided that the end of the spring is not too wet and May temperatures are mild, particularly in So...

[Arable Crops Hold Potential despite Record Precipitation Madrid Spain 4-26-2013](#)

**Romanian oilseeds are expected to return to normal levels|Oilseeds and Products Agricultural Situation|Bucharest|Romania|5/1/2013**

Following the drought of last summer, oilseeds crops are expected to boost this year in terms of both volume and productivity. Mild winter and good soil moisture provide good prospects for rapeseeds, production being expected to triple compared to the previous year, which was an exceptionally poor year though. Sunflower area is predicted to decline, as a result of a lower available acreage for the spring crops, while soybean area is anticipated to remain flat.

[Romanian oilseeds are expected to return to normal levels Bucharest Romania 4-26-2013](#)

**Grains and Oilseeds Market Update|Oilseeds and Products Grain and Feed|Sofia|Bulgaria|2/4/2013**

The record summer drought and above average temperatures continued into the fall. The potential for record yields from fall crops has diminished, especially for the rapeseeds crop as winter weather to date has remained mild with below normal snowfall and soil moisture levels especially in North West Bulgaria. Absent a substantial recharge of subsoil moisture, growing conditions for spring crops will be less than optimal. Planted areas of fall wheat and barley exceed that of last year while r...

[Grains and Oilseeds Market Update Sofia Bulgaria 1-30-2013](#)

**France Chooses Agro-Ecology for a More Sustainable Agriculture |Agriculture in the Economy Agriculture in the News Biofuels Biotechnology - GE Plants and Animals Climate Change/Global Warming/Food Security Oilseeds and Products Policy and Program Announcements Special Certification - Organic/Kosher/Halal|Paris|France|1/25/2013**

Under France's recently formed government, the Ministry of agriculture has launched an initiative to make agriculture more sustainable, which aims to make France a champion of agro-ecology.

Under this initiative, the Ministry puts forward practices that are environment-friendly and increase farms' autonomy. While the government's focus is on the environmental and social legs of sustainability, the economic dimension appears to have little value. Post recommends sharing successful conservation...

[France Chooses Agro-Ecology for a More Sustainable Agriculture Paris France 1-14-2013](#)

**Select Recovery of Production Ahead|Livestock and Products|The Hague|EU-27|9/11/2013**

After significant production cuts in 2012, EU beef and pork production are expected to rebound. EU beef production is forecast to increase in 2014, and pork production in 2015. The main drivers are the increased efficiency of the sector, high carcass and milk prices, relatively low feed prices, and the abolishment of the milk quota in 2015. The recovery is however restricted to a minority of Member States, and exportable supplies are expected to be limited.

[Livestock and Products Annual The Hague EU-27 9-6-2013](#)

**Select, Select Ample Soybean World Supplies to Boost EU-27 Soybean Meal Consumption|Oilseeds and Products|Vienna|EU-27|5/7/2013**

Expectations for a total EU-27 oilseeds production in MY 2013/14 are for an 8.6 percent increase reaching 29.7 MMT. Compared to the previous year rapeseed, sunflower and soybean production is forecast to grow. The increase is through higher acreage of rapeseed especially in Germany and Eastern European countries and normal yields of sunflower which were down in MY 2012/13 due to drought in major producing countries. Ample world supplies of soybeans and soybean meal in combination with a growi...

[Oilseeds and Products Annual Vienna EU-27 4-5-2013](#)

**Related Topics**

**2013|Grain and Feed|London|EU-27|4/10/2013**

The outlook for the MY2013/14 EU27 grain crop is generally positive. While there were some weather-related fall planting delays, the crops already in the ground are developing well with minimal winterkill. A partial thaw in February has been followed by a renewed cold spell across the EU27, which has raised concerns for the winter planted crops and delayed spring plantings. If the forecast crop of 292 MMT is realized, it will be a much more sizeable crop than last year but still 20 MMT below ...

[Grain and Feed Annual London EU-27 4-4-2013](#)

**Animal Numbers, Cattle, Meat, Beef and Veal, Animal Numbers, Swine, Meat, Swine, Animal Numbers, Cattle, Animal Numbers, Swine, Meat, Beef and Veal, Meat, Swine Supply tightens, prices surge|Livestock and Products|The Hague|EU-27|3/1/2013**

The limited number of animals available for slaughter returned the EU to being a net beef importer in 2012. This tight situation is expected to continue in 2013. EU pork production is also forecast to decline during 2012 and 2013. The new animal welfare regulations for sows have cut the breeding herd more significant than anticipated. In 2013, efficient swine production is expected to remain and forecast to benefit from elevated carcass prices and falling feed prices.

[Livestock and Products Semi-annual The Hague EU-27 2-26-2013](#)

**Poultry, Meat, Broiler, Poultry, Meat, Turkey, Select EU-28 Poultry sector to grow again in 2013 and 2014|Poultry and Products|Paris|EU-27|9/27/2013**

EU-28 broiler sector is expected to grow in 2013 and 2014, benefiting from slowly growing

domestic demand (which is less affected than other meats by the economic recession). Brazil and Thailand will remain the largest suppliers of broiler meat to the EU-27. EU-28 broiler meat exports are expected to remain stable in 2013, mainly due to the suspension in July 2013 of all EU-28 poultry meat export restitutions not being offset by increased exports of low-priced cuts. On the other hand, EU-28 Turk...

[Poultry and Products Annual Paris EU-27 9-16-2013](#)

**Corn, Wheat, Oil, Soybean, Oil, Rapeseed, Oil, Palm EU Biofuels Annual 2013|Biofuels|The Hague|EU-27|8/16/2013**

EU Member States are mandated to reach a minimum of 10 percent for renewable energy consumed in transport in 2020. To count against the 10 percent goal, biofuels must meet sustainability requirements laid down in the Renewable Energy Directive (RED). During 2007 – 2012, about a fifth of the domestic use of transport biofuels was imported from outside the EU, but a series of trade actions have been imposed to stymie this trade of bioethanol and biodiesel. The EC expects that solid biomass for ...

[Biofuels Annual The Hague EU-27 8-13-2013](#)