



Oilseeds and Protein Crops market situation

Meeting of the Expert Group for Agricultural Markets –
Subgroup Arable Crops and Olive Oil

30 April 2026

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World Oilseeds & Market News



Oilseeds & Protein crops: areas & production (2025/26 & 2026/27)

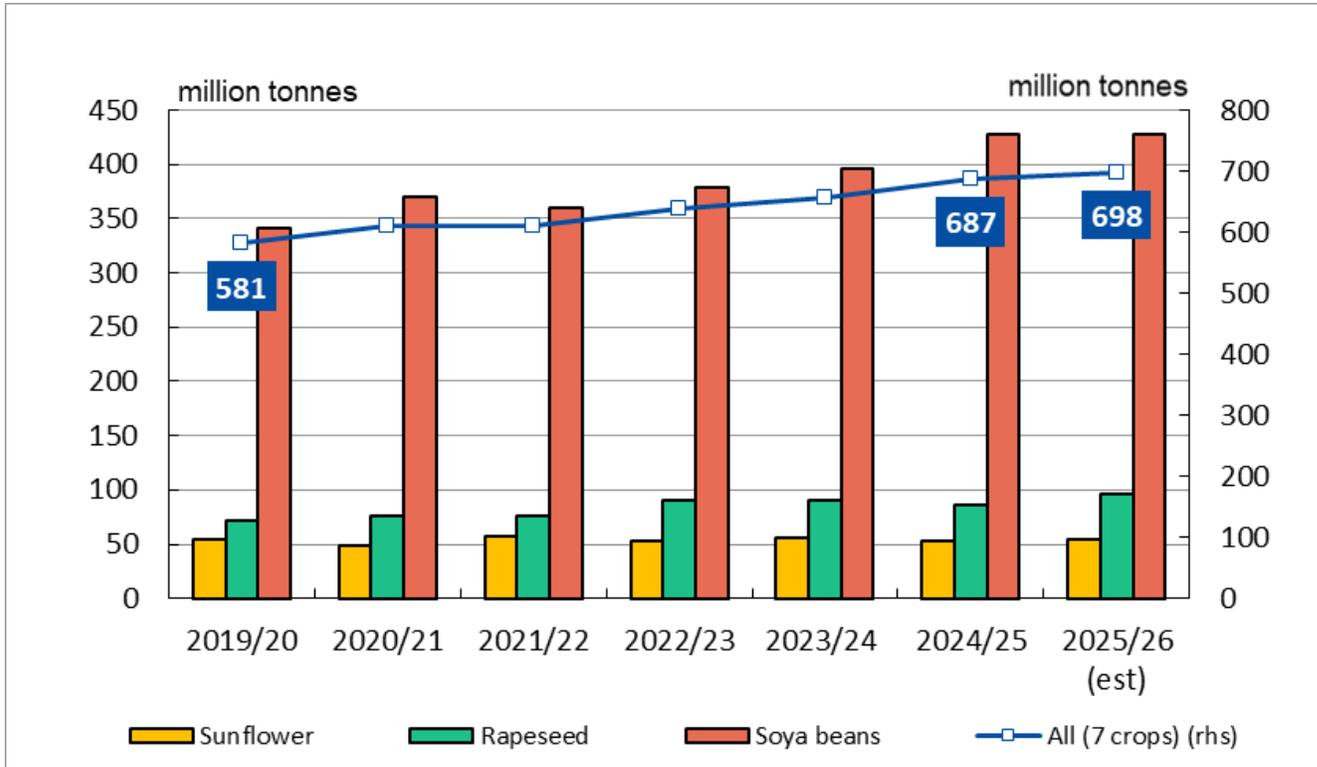


S&D balance sheets (Oilseeds, Meals, Oils)



EU imports from Ukraine

2025/26 World Oilseeds (USDA)



Source: USDA-WASDE report

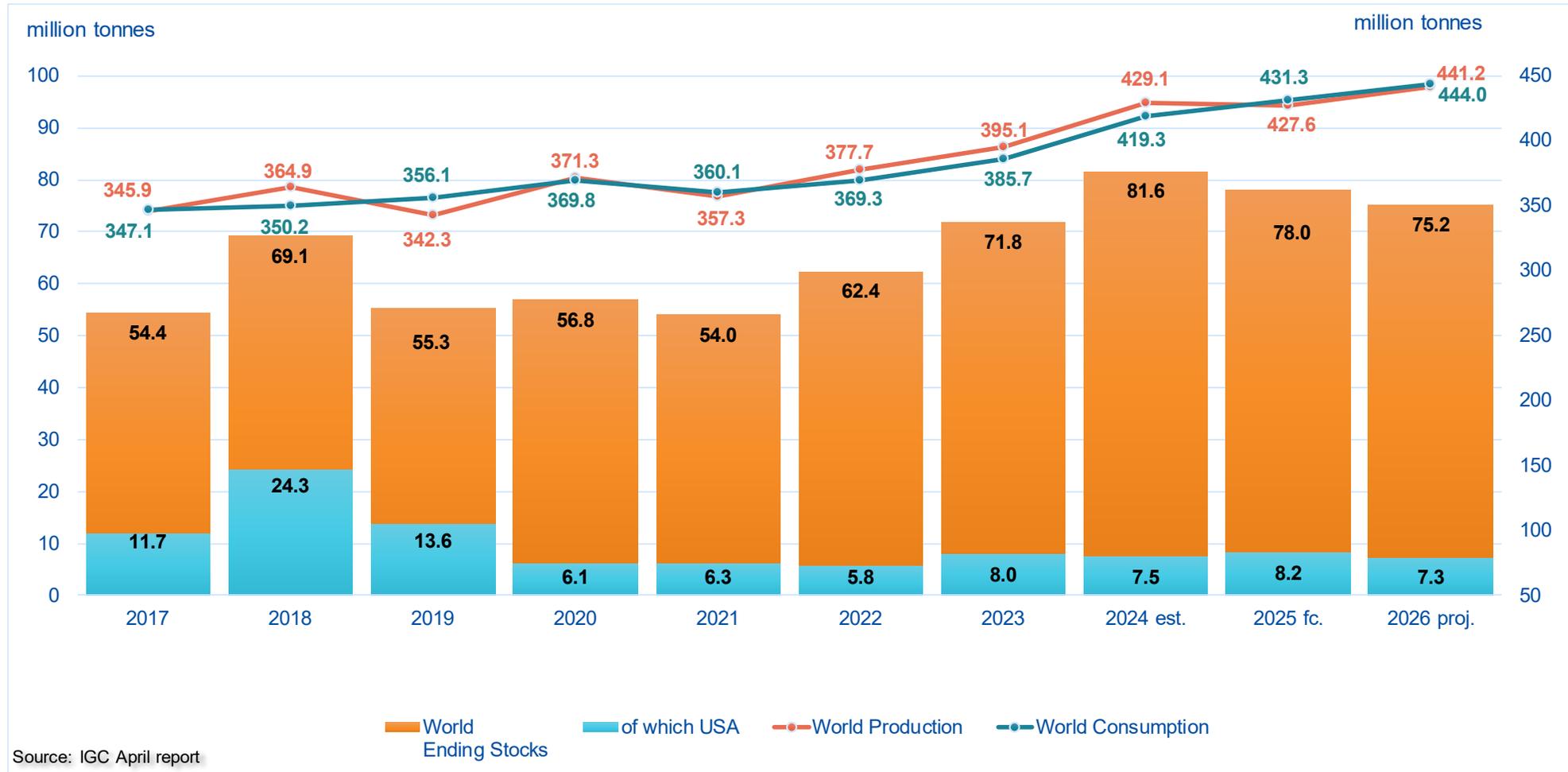
25/26 outlook (changes y/y):

Total Oilseeds: 698 mt (+11)

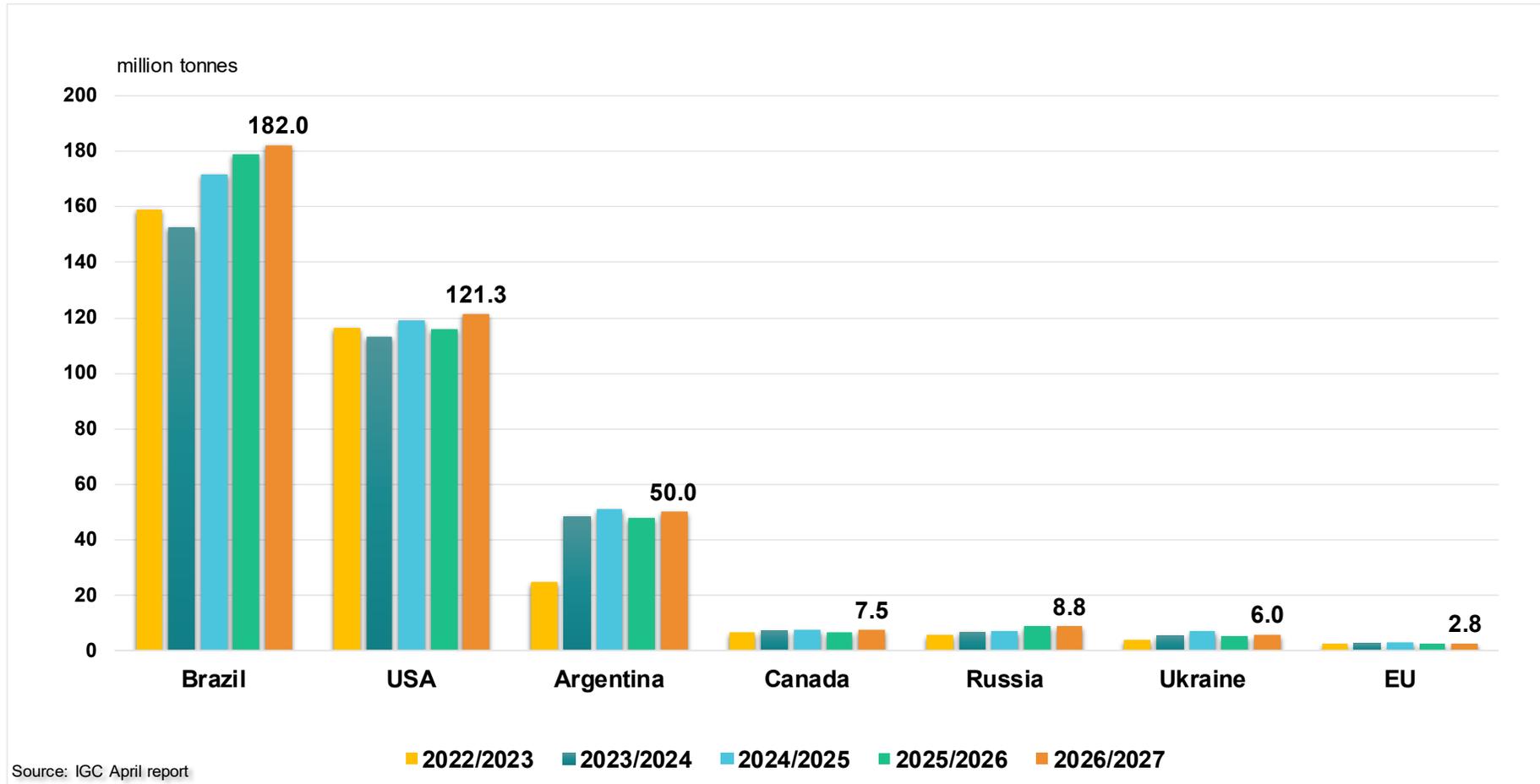
- Soya beans: 427 mt
- Rapeseed: 96 mt
- Sunflower: 55 mt



World soya: IGC



IGC: soya beans production forecast



World Market

Brazil

- **BR (IGC): 2025/26 soya bean production** is placed marginally up at 179.0 million tonnes (171.5 million tonnes previous year).
- **BR (IGC citing AgRural): as at 16 Apr, 2025/26 soya bean harvesting** is at 92% complete (92% year ago).
- **BR (ANEC): April soya bean export** is expected at 16.4 million tonnes (13.5 million tonnes same month previous year); **soya meal shipments** estimated at 3.1 million tonnes (2.2 million tonnes same month previous year).

World Market USA

- **USA (USDA-WASDE): soya bean output** for marketing year 2025/26 is pegged at 116.0 million tonnes, reflecting a 2.6% year-on-year reduction.
- **USA (USDA weekly export sales):** w/e 16 Apr, **soya beans net sales** estimated at 0.4 million tonnes, cumulative marketing year (Sep/Aug) expected at 38.5 million tonnes (-18% year-on-year); cumulative **soya meal** exports at 14.1 million tonnes (+17% year-on-year).
- **USA (USDA Crop Progress report):** as at 27 Apr, 2026/27 **soya bean plantings** is estimated at 23% (12% four-year average).
- **USA (IGC):** 2026/27 **soya bean production** is unchanged month-on-month at 121.3 million tonnes (up 4.5% year-on-year).

World Market

Argentina

- **ARG** (*Ag. Ministry crop report*): 2025/26 **soya bean planted area** revised to 16.5 million hectares (18.0 million hectares previous year). Output forecast at 49.0 million tonnes (51.1 million tonnes previous year). **Sunflower seed production** estimated at 7.3 million tonnes (5.6 million tonnes previous year).
- **ARG** (*IGC*): **Sunflower seed export** projections raised to 1.2 million tonnes.
- **ARG** (*Buenos Aires Grain Exchange*): w/e 22 Apr, **soya bean harvesting** at 10% complete (15% previous year). **Sunflower seed harvest** reached 91% done (96% previous year).

World Market Canada

- **Canada** (AAFC – Outlook for Principal Field Crops): **2026/27 canola area** is projected at 8.8 million hectares. **Canola production** is estimated at 19.2 million tonnes, still above the five-year average.
- **Canada** (AAFC – Outlook for Principal Field Crops): **2026/27 canola crush** is forecast at a 13 million tonnes record, reflecting new processing capacity and strong demand. **Exports** are estimated at 7.8 million tonnes (5% below the previous season).

World Market Ukraine

- **UKR** (*TAXUD surveillance data*): week ending 24 April of marketing year 2025/26 (43 weeks) – EU imports of **soya bean** are estimated at 1.0 million tonnes (10.0% share of imports), while **rapeseed** imports stand at 1.4 million tonnes (34.6% share of imports). **Sunflower seed oil** imports from Ukraine advanced at 1.5 million tonnes (93.6% share of imports).
- **UKR** (*UkrAgroConsult*): world's largest exporter of sunflower oil, accounting for 33% of global exports, followed by Russia (30%) and Argentina (14%).
- **UKR** (*Apk-Inform monitoring data*): **sunflower seed oil prices** are at their highest level in the past four years (USD 1 320 per tonne).

Global Market [1]

April – IGC Report. Marketing year **2025/26**:

- **Global soya bean production** is increased this month to 428.0 million tonnes, tied to a record harvest in Brazil. Total **consumption** is anticipated to rise by 3% year-on-year to 431.0 million tonnes, reflecting strong demand. The US domestic use is expected to rise to 74.1 million tonnes (69.0 million tonnes previous year). **Stocks** are expected to decline to 78.0 million tonnes. **Trade** is predicted to slightly increase to 187.0 million tonnes, reflecting large shipments to Asia.

Marketing year **2026/27**

- Total soya bean **output** is provisionally estimated at 441.0 million tonnes (up 3% year-on-year). **Consumption** is forecast at 444.0 million tonnes (also 3% higher year-on-year), reflecting stronger demand from the biofuel market. Ending **stocks** are expected to fall to 75.0 million tonnes. **Trade** is projected to expand to 190.8 million tonnes (up 2% year-on-year), with the U.S. anticipated to edge higher and Brazil to further increase shipments.

Global Market [2]

April – IGC Report. Marketing year **2025/26**:

- **Global rapeseed production** is revised slightly to 95.0 million tonnes. This still represents a 10% year-on-year increase, supported by strong crops in the EU, Canada and Australia. Total **consumption** is estimated at 94.2 million tonnes (87.8 million tonnes in the previous year). Closing **stocks** are forecast to rise by 9% year-on-year, to 10.0 million tonnes. **Trade** is projected at 18.1 million tonnes, with shipments to Asia expected to increase to 8.6 million tonnes.

Marketing year **2026/27**

- With planting area estimated at a record of 45.0 million hectares, **rapeseed production** is anticipated at 94.3 million tonnes. **Consumption** is slightly increased to 95.3 million tonnes, reflecting expectations of stronger use in Asia. **Stocks** are projected to fall to 8.9 million tonnes. **Trade** is unchanged at 18.0 million tonnes, with stronger Asian demand expected to offset lower EU imports.

Global Market [3]

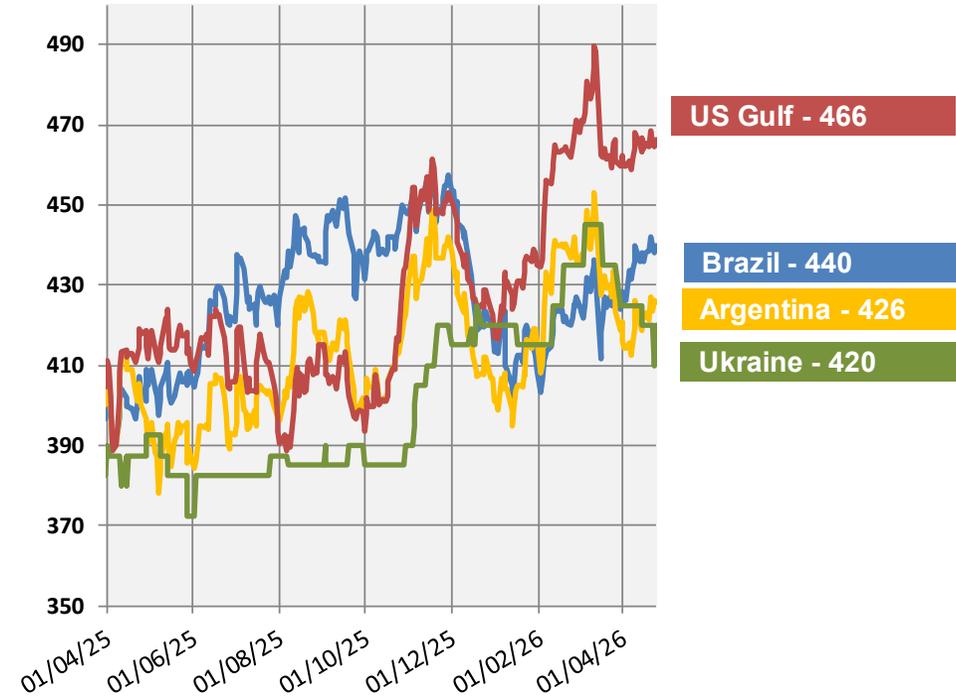
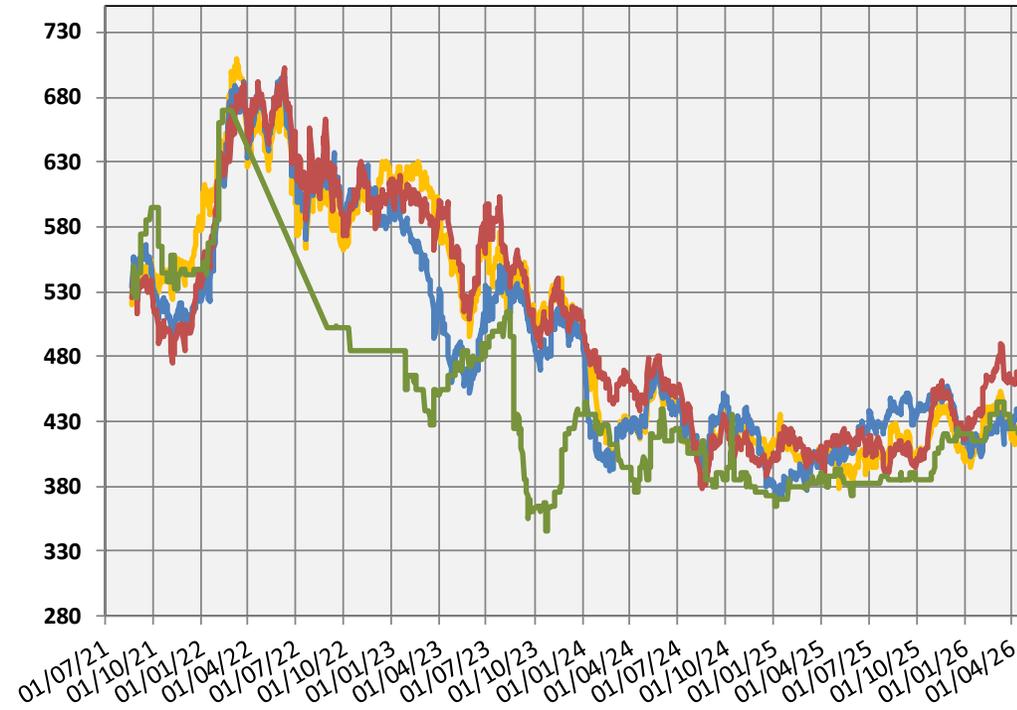
April – IGC Report. Marketing year **2025/26**:

- Global **sunflower seed production** is estimated at 55.8 million tonnes (+7% year-on-year), supported by large crops in the Black Sea region and the Americas. **Consumption** is forecast to rise by 7% year-on-year, to 55.7 million tonnes, reflecting firm world demand. **Trade** is expected to increase to 3.6 million tonnes, with large shipments from Argentina and Moldova.

Marketing year **2026/27**

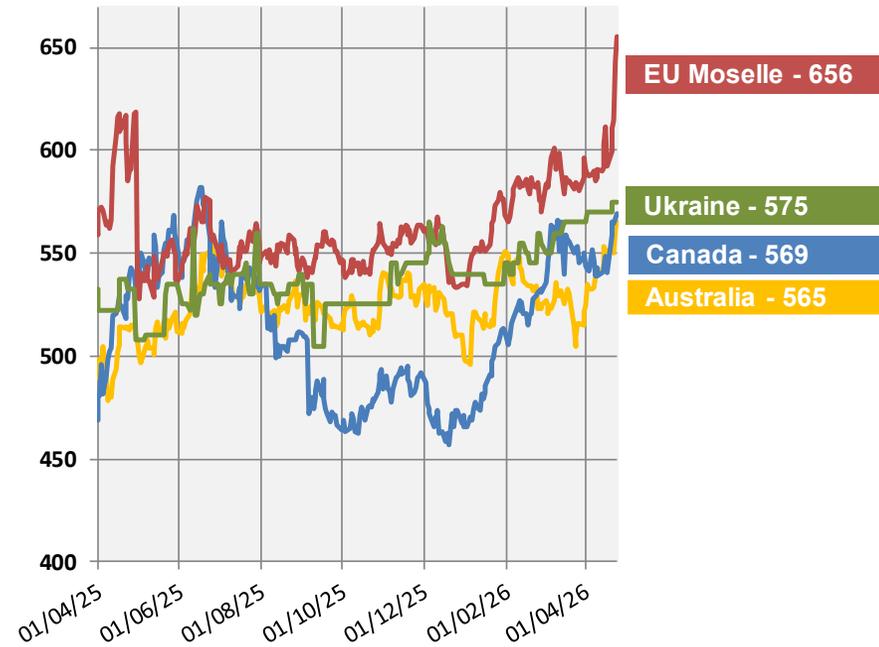
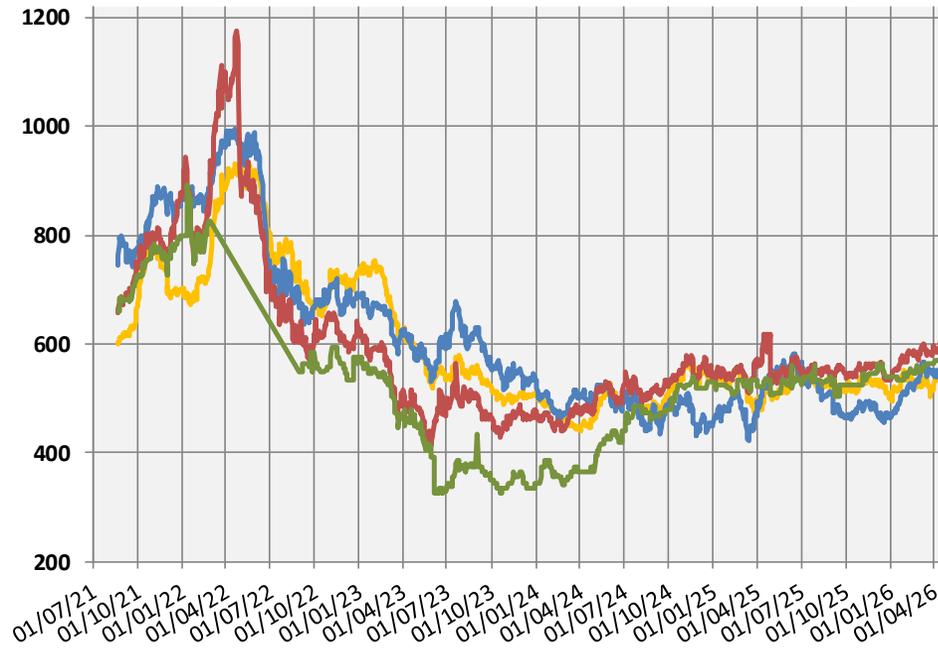
- **Sunflower seed production** is projected to rise by 11% year-on-year, to 61.7 million tonnes, reflecting also a relatively modest increase in area. Global **consumption** is anticipated to reach 61.7 million tonnes. **Trade** is expected to be broadly in line with the average at 3.5 million tonnes (down 3.8% year-on-year), shaped by demand from buyers in Asia.

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



Source: International Grains Council
Latest prices referring to: 24/04/2026

World export prices for rapeseed – (USD/tonne)

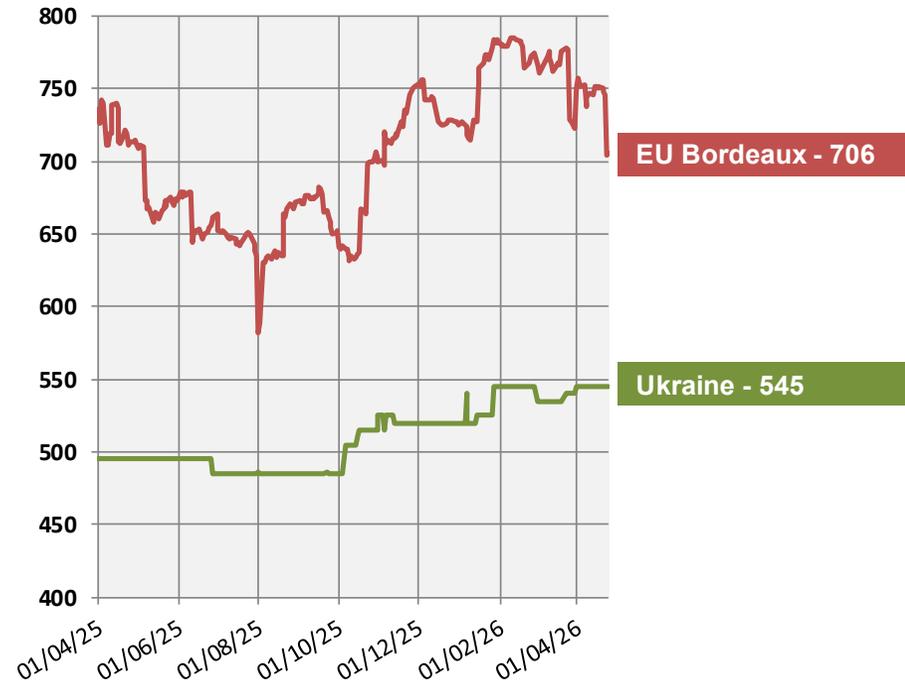


Source: International Grains Council
Latest prices referring to: 24/04/2026

World export prices for sunflower – (USD/tonne)



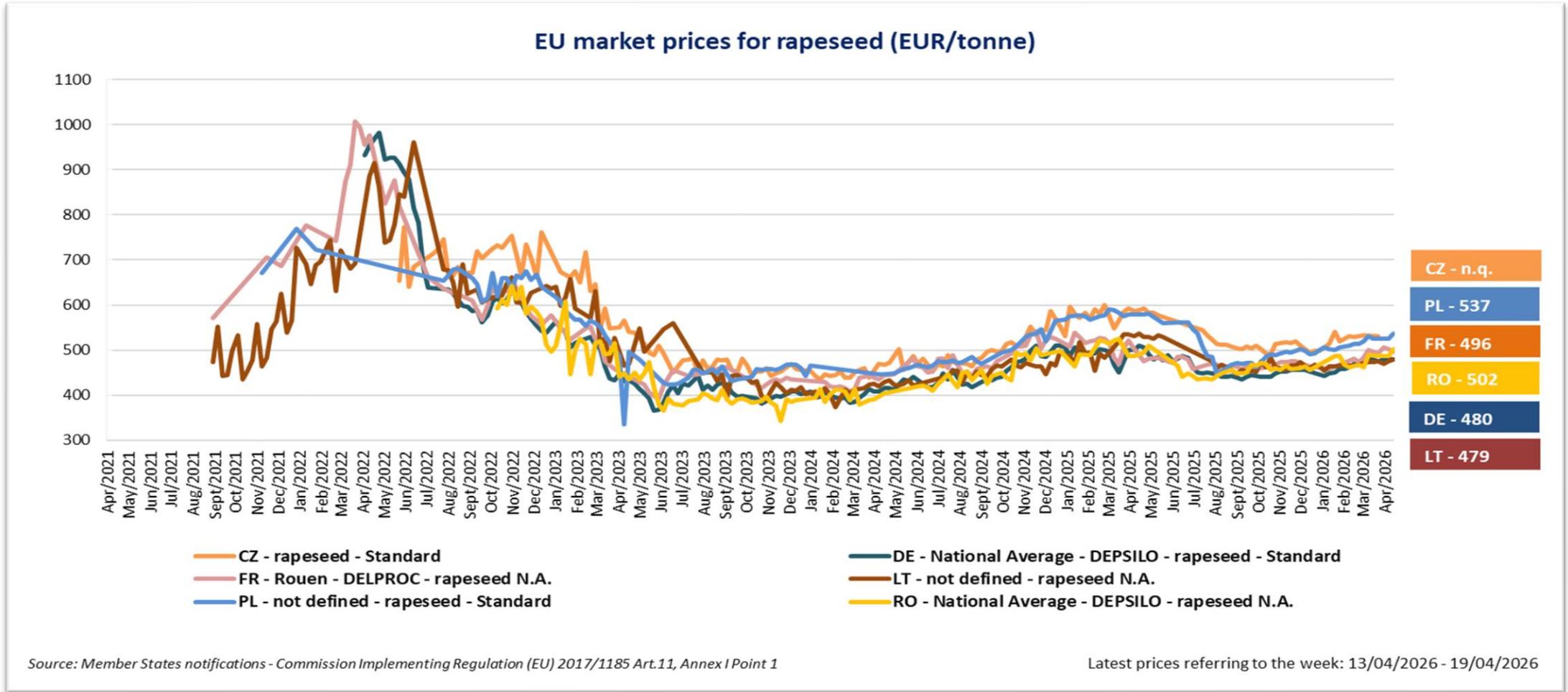
Source: International Grains Council
Latest prices referring to: 24/04/2026



Global Oilseed prices: key messages

- In April, global **soya bean FOB prices** increased modestly month-on-month in the US (**USD 466** per tonne) and Brazil (**USD 440** per tonne), while remaining steady in Argentina at **USD 426** per tonne, reflecting strong demand from the feed and biofuel markets. Year-on-year, prices increased by 5% in Argentina and by 11% in the US, driven by firm domestic demand in the latter.
- **EU rapeseed quotations** stand out for strong price momentum, rising by 12% month-on-month to **USD 656** per tonne, signalling firmer demand within Europe. Australian FOB prices also record a sharp 12% month-on-month increase, while Canadian canola is up 3% to USD 569 per tonne, supported by tighter global supplies and rising crude oil prices. Overall, prices are 9% higher than in the same period last year.
- **Global sunflower seed prices** are mixed. EU Bordeaux prices experience a short-term correction to **USD 706** per tonne (down 9% month-on-month and 1% year-on-year) after previously elevated levels, while Ukrainian prices remain stable at USD 545 per tonne amid subdued trading activity.

EU prices for rapeseed – (EUR/tonne)



EU prices for sunflower – (EUR/tonne)

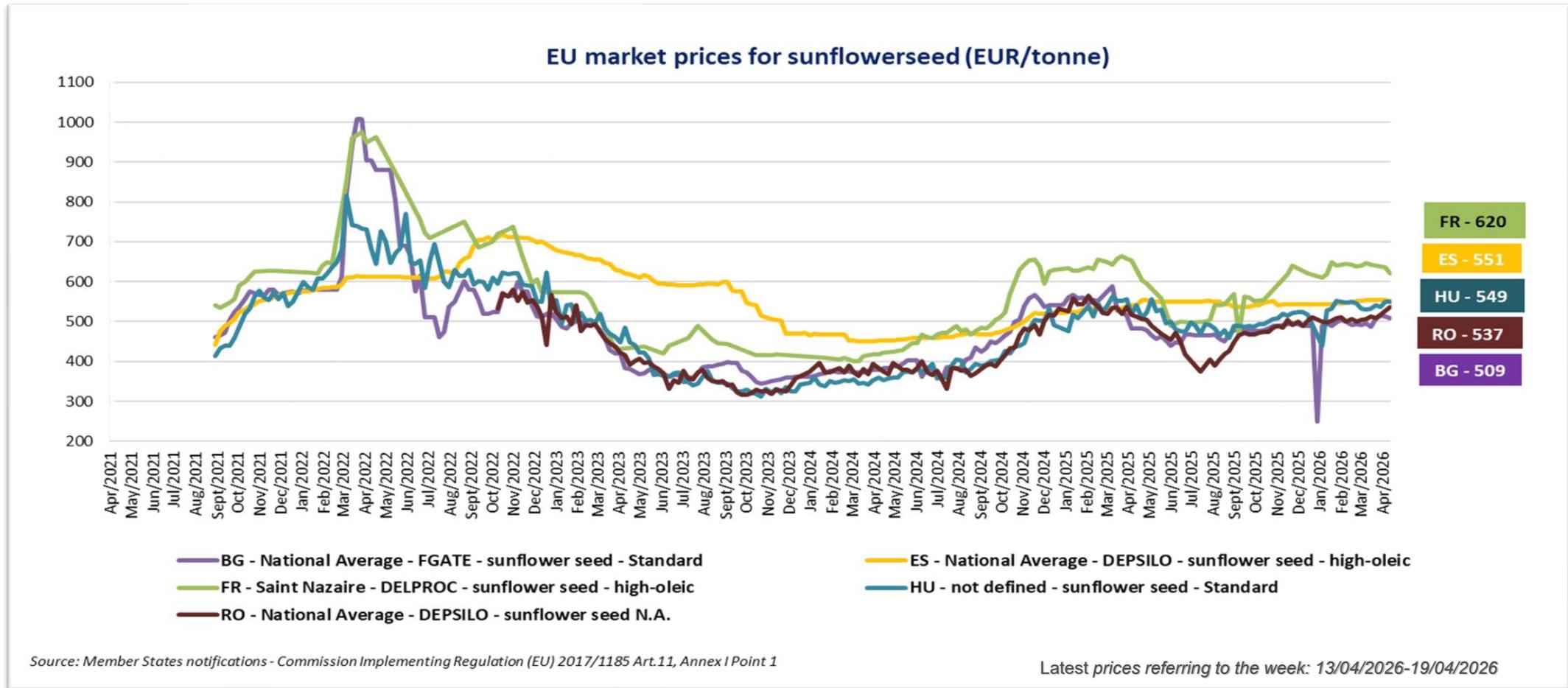


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Oilseeds & Protein crops: areas & production (2025/26 & 2026/27)



S&D balance sheets (Oilseeds, Meals, Oils)



EU imports from Ukraine

EU oilseeds 2026/27 projection

EU OILSEEDS AREA

(million hectares)

	5-year trimmed average	2025/26	2026/27		
			April	vs. 2025/26 (%)	vs. 5-y AVG (%)
Rapeseed	5.87	6.04	6.20	2.6	5.5
Sunflower	4.71	4.66	4.92	5.4	4.3
Soya Beans	1.03	1.02	1.03	1.5	-0.1
TOTAL	11.67	11.76	12.19	3.6	4.5

EU OILSEEDS PRODUCTION

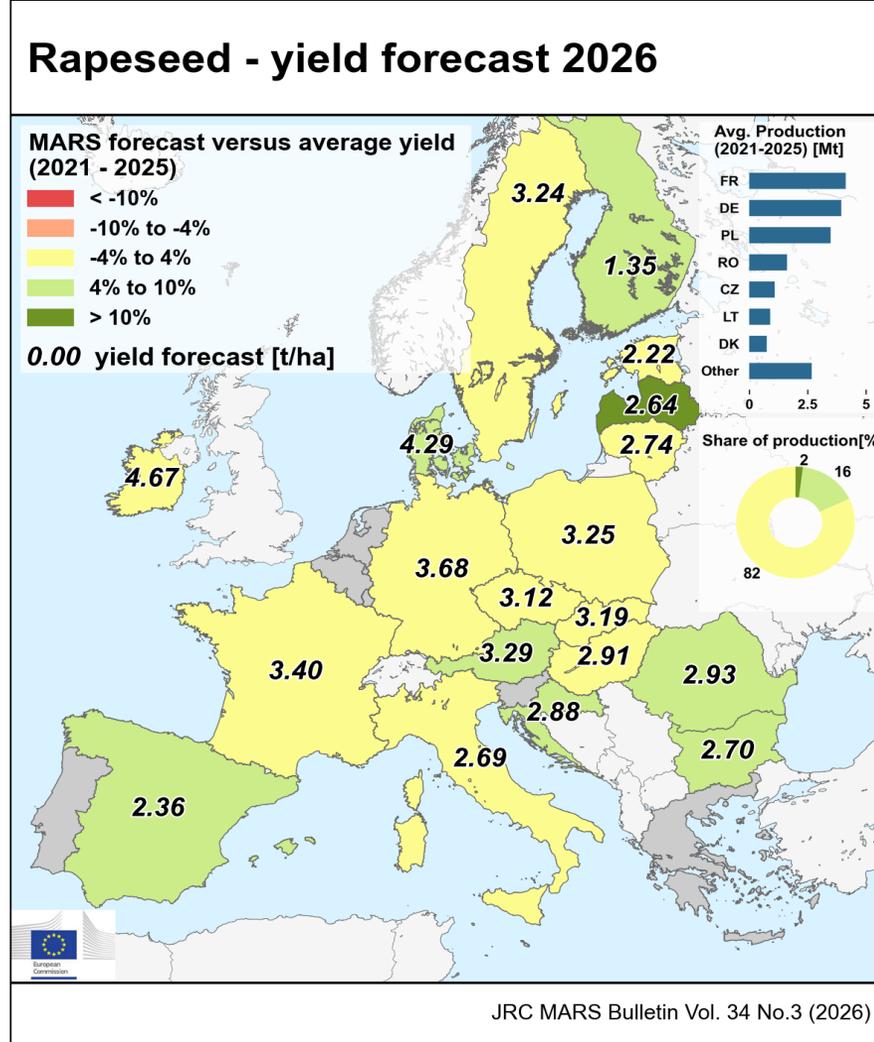
(million tonnes)

	5-year trimmed average	2025/26	2026/27		
			April	vs. 2025/26 (%)	vs. 5-y AVG (%)
Rapeseed	18.79	20.18	20.79	3.0	10.6
Sunflower	9.28	8.72	8.79	0.8	-5.2
Soya Beans	2.75	2.82	2.75	-2.6	-0.2
TOTAL	30.82	31.80	32.40	1.9	5.1

Sources : EC - DG AGRI.

EU rapeseed 2026/27 yield projection

Country	Rapeseed					
	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]			
			latest forecast	% diff 5yrs avg	% diff 2025	% diff prev. month
EU	3.20	3.33	3.25	+1	-3	+1
AT	3.14	3.27	3.29	+5	+1	±0
BE	—	—	—	—	—	—
BG	2.58	2.73	2.70	+4	-1	±0
CY	—	—	—	—	—	—
CZ	3.13	3.04	3.12	-1	+2	+3
DE	3.60	3.64	3.68	+2	+1	±0
DK	4.12	4.34	4.29	+4	-1	±0
EE	2.30	2.73	2.22	-4	-19	±0
EL	—	—	—	—	—	—
ES	2.16	2.62	2.36	+9	-10	+3
FI	1.24	1.08	1.35	+9	+25	±0
FR	3.36	3.67	3.40	+1	-7	+1
HR	2.70	2.94	2.88	+7	-2	±0
HU	2.83	2.90	2.91	+3	±0	±0
IE	4.59	4.86	4.67	+2	-4	±0
IT	2.78	2.64	2.69	-3	+2	-4
LT	2.71	2.80	2.74	+1	-2	±0
LU	—	—	—	—	—	—
LV	2.38	2.37	2.64	+11	+11	±0
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	3.31	3.30	3.25	-2	-2	-1
PT	—	—	—	—	—	—
RO	2.81	3.16	2.93	+4	-7	+6
SE	3.15	3.62	3.24	+3	-11	±0
SI	—	—	—	—	—	—
SK	3.21	3.48	3.19	-1	-8	±0



EU protein crops 2026/27 projection

EU PROTEIN CROPS AREA			<i>(million hectares)</i>			
	5-year trimmed average	2025/26	2026/27			
			April	vs. 2025/26 (%)	vs. 5-y AVG (%)	
Field peas	0.93	1.03	1.00	-2.7	7.5	
Broad beans	0.48	0.53	0.51	-4.2	4.8	
Sweet lupins	0.25	0.27	0.28	3.2	14.0	
TOTAL	1.66	1.83	1.79	-2.3	7.7	

EU PROTEIN CROPS PRODUCTION			<i>(million tonnes)</i>			
	5-year trimmed average	2025/26	2026/27			
			April	vs. 2025/26 (%)	vs. 5-y AVG (%)	
Field peas	2.00	2.44	2.41	-1.10	20.40	
Broad beans	1.29	1.49	1.43	-4.30	10.90	
Sweet lupins	0.43	0.52	0.53	2.10	21.80	
TOTAL	3.72	4.44	4.36	-1.8	17.2	

Sources : EC - DG AGRI.

EU oilseeds and protein crops 2026/27 projection

2026/2027		EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	NL	AT	PL	PT	RO	SI	SK	FI	SE
Rapeseeds	Area	6 196	9	157	311	166	1 148	64	18	7	89	1 379	26	23	0	119	289	2	153	2	20	1 105	0	822	2	128	41	116
	Yield	3.35	3.95	2.73	3.04	4.34	3.64	2.73	4.86	1.97	2.62	3.67	2.94	2.64	0	2.37	2.80	3.46	2.90	3.65	3.27	3.30	0	3.16	2.78	3.48	1.08	3.62
	Production	20 786	36	428	947	721	4 174	175	87	13	233	5 058	76	61	0	282	809	8	444	6	65	3 647	0	2 599	6	447	45	420
Sunflower	Area	4 917	0	943	19	0	77	0	0	81	743	841	66	113	0	0	0	0	693	0	26	29	3	1 220	1	60	0	0
	Yield	1.79	0	1.57	2.85	0	2.31	0	0.00	2.07	1.15	2.09	3.00	2.66	0	0	0	2.72	2.37	0.00	2.96	2.66	2.25	1.50	2.01	2.69	0	0
	Production	8 795	0	1 480	55	0	178	0	0	169	856	1 760	199	300	0	0	0	1	1 644	0	78	77	6	1 831	1	161	0	0
Soja	Area	1 030	0	2	34	0	53	0	0	2	3	166	92	253	0	0	2	0	84	0	99	33	0	135	4	70	0	0
	Yield	2.67	0	0.98	2.35	0	3.02	0	0	0.37	3.27	2.58	2.40	3.56	0	0	1.63	0.00	2.14	0.00	3.18	2.64	0	1.31	2.40	2.56	0	0
	Production	2 748	0	2	80	0	159	0	0	1	9	429	220	899	0	0	3	0	179	0	315	86	0	177	9	179	0	0
Linseed	Area	45	0	2	2	0	4	0	0	0	1	26	0	0	0	0	1	0	2	0	1	1	0	1	0	0	0	2
	Yield	1.63	0.00	1.34	1.17	0	1.79	1.38	0.00	2.17	0.77	1.84	0	0	0	0	1.23	0.65	1.37	0.00	1.14	1.55	0	1.50	0.90	0.00	1.49	0
	Production	73	0	2	2	0	8	0	0	0	1	49	0	0	0	0	1	0	3	0	2	1	0	2	0	0	0	2
Total oilseeds	Area	12 188	9	1 104	366	166	1 282	64	18	90	835	2 413	184	389	0	119	291	3	931	2	147	1 167	3	2 179	7	258	42	118
	Yield	2.66	3.93	1.73	2.96	4.34	3.52	2.73	4.84	2.03	1.32	3.02	2.69	3.24	0	2.37	2.79	3.31	2.44	2.55	3.13	3.27	2.25	2.12	2.49	3.04	1.07	3.59
	Production	32 401	36	1 912	1 084	721	4 519	175	87	183	1 099	7 295	495	1 260	0	283	812	9	2 270	6	459	3 811	6	4 609	17	787	45	422
Field peas	Area	999	1	5	52	16	136	47	1	25	183	166	1	14	0	46	56	0	11	1	7	39	10	99	0	15	46	25
	Yield	2.41	3.55	1.85	2.27	4.25	3.20	1.30	5.73	1.38	1.59	3.60	1.81	2.58	1.65	2.58	2.36	3.47	2.54	0.00	2.23	2.30	1.25	1.28	2.06	2.81	2.15	3.63
	Production	2 408	3	9	117	66	436	61	4	34	290	597	1	37	0	118	132	0	28	0	15	89	12	127	0	43	98	89
Broad beans	Area	507	1	0	3	23	72	10	15	2	23	106	6	53	0	31	84	0	1	3	5	42	5	5	0	0	4	13
	Yield	2.81	4.38	0	2.13	4.40	3.42	2.20	5.40	2.96	1.09	2.67	2.03	2.12	2.15	3.16	2.67	2.60	1.19	3.05	2.46	2.71	0.91	0.90	1.73	1.82	3.78	
	Production	1 425	5	0	5	101	245	22	83	6	26	282	13	112	0	98	223	0	1	11	12	112	4	5	0	7	51	
Lupins	Area	283	0	0	1	1	27	0	0	16	3	4	0	1	0	0	5	0	0	0	1	217	7	0	0	0	0	0
	Yield	1.86	0	0.00	1.21	2.19	1.96	0	0	1.12	0.83	2.13	0	1.50	0	0.72	1.17	2.50	1.68	0	1.54	1.96	0.80	0.75	1.21	0	0	
	Production	526	0	0	1	1	53	0	0	18	2	9	0	2	0	0	6	0	0	0	1	426	5	0	0	0	0	
Total protein crops	Area	1 789	2	5	55	39	235	57	16	43	209	276	7	68	0	77	145	0	12	4	12	297	21	104	0	15	50	38
	Yield	2.44	4.05	1.86	2.25	4.31	3.12	1.46	5.41	1.35	1.52	3.22	2.01	2.21	2.07	2.81	2.50	3.13	2.46	2.39	2.28	2.11	1.03	1.26	2.06	2.79	2.13	3.68
	Production	4 359	8	9	124	169	734	83	87	58	318	888	14	151	0	216	361	1	29	11	28	628	22	132	0	43	105	140
Oilseeds and protein crops	Area	13 977	11	1 109	421	205	1 517	121	34	133	1 044	2 689	191	457	0	196	436	3	943	7	159	1 464	24	2 283	7	274	91	156
	Yield	2.63	3.95	1.73	2.87	4.34	3.46	2.13	5.11	1.81	1.36	3.04	2.66	3.09	2.07	2.54	2.69	3.30	2.44	2.44	3.07	3.03	1.16	2.08	2.48	3.03	1.64	3.61
	Production	36 760	44	1 922	1 208	890	5 253	259	174	241	1 417	8 183	510	1 411	0	499	1 173	10	2 299	16	487	4 438	27	4 741	18	830	150	562

EU Oilseeds 2025/26: key messages

EU Oilseeds **2025/26**

- **EU oilseed area** is slightly revised downward from the previous month, estimated now at 11.8 million hectares, including linseed (0.9% higher than last year).
- **Total EU oilseed production** for 2025/26 is increased by 0.5 million tonnes at 31.8 million tonnes, reflecting higher rapeseed output in Bulgaria, Latvia and Poland, stronger sunflower seed production in Bulgaria, Hungary and Romania and increased soya bean production in Romania.

EU Oilseeds 2026/27: key messages

EU Oilseed projections for 2026/27

- The **EU oilseed area** is now projected to rise slightly year-on-year to 12.2 million hectares. Rapeseed area is anticipated to expand to 6.2 million hectares.
- Total **EU oilseed production** for the next marketing year is forecast to remain broadly stable year-on-year at 32.4 million tonnes. Higher rapeseed output in France and Romania is partially offset by reduced rapeseed production in Poland. **EU rapeseed** production is projected to increase by 3% year-on-year to 20.8 million tonnes. Soya bean output is provisionally put at 2.7 million tonnes, as planting has not yet begun in most major producing Member States.

EU Protein Crops 2025/26 & 2026/27: key messages

EU Protein Crops **2025/26** & **2026/27**

- For the marketing year 2025/26, main changes concerning EU **protein crops area** and **production** are linked to upward revision of lupins area (+49 100 hectares in Poland) and lupins production (+96 900 tonnes in Poland). Total protein crops production is pegged at 4.4 million tonnes.
- In the upcoming marketing year, the total EU **area** planted with **protein crops** is slightly revised to 1.8 million hectares, including 1.0 million hectares of field peas, reflecting an increase of 0.16 million hectares of field peas in France. Assuming relatively favourable yields, EU **protein crop output** next season is expected to remain stable at 4.4 million tonnes.

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EU imports from Ukraine

Oilseeds balance sheet (EU)

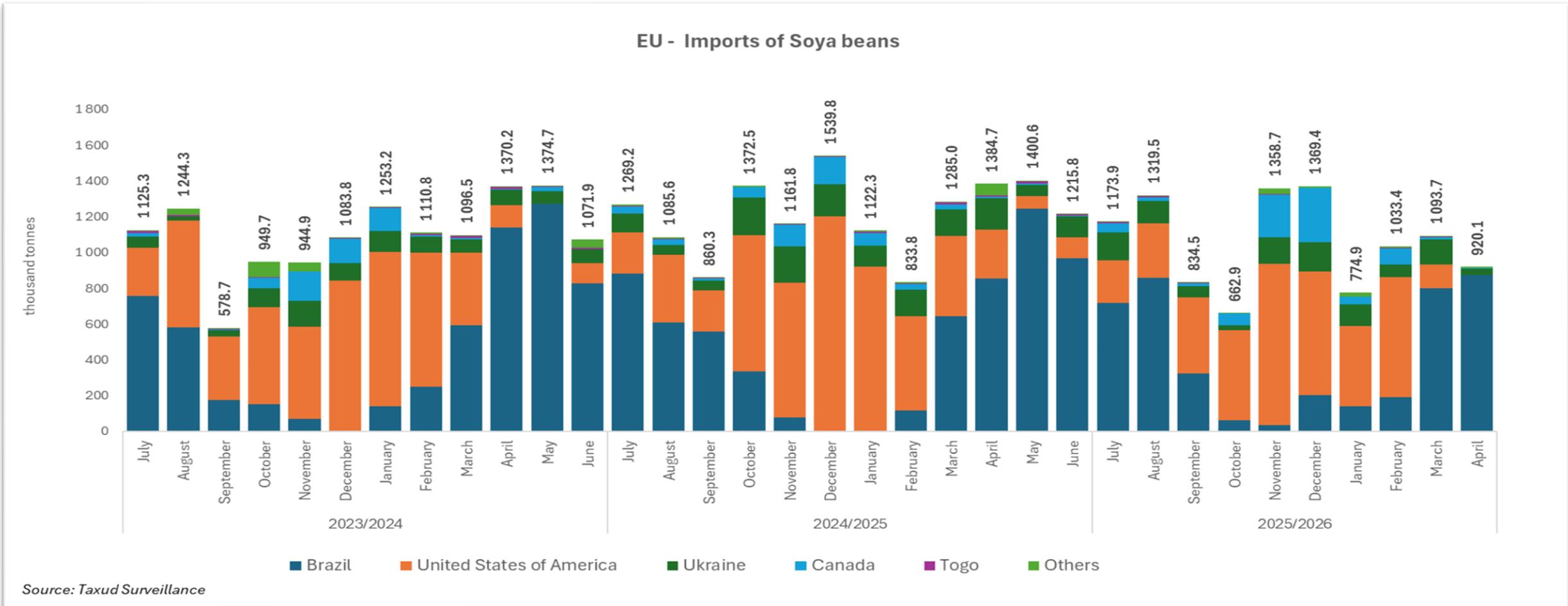
OILSEEDS SUPPLY & DEMAND

(thousand tonnes)

<i>last updated: 30/04/2026</i>	2025/26 fc.				2026/27 proj.			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	833	1 300	878	3 011	833	1 300	878	3 011
Usable production	20 180	2 821	8 724	31 725	20 786	2 748	8 795	32 328
Area (thousand ha)	6 037	1 015	4 665	11 717	6 196	1 030	4 917	12 143
Yield (tonnes/ha)	3.34	2.78	1.87	2.71	3.35	2.67	1.79	2.66
Imports (from third countries)	5 500	14 000	850	20 350	5 932	13 947	923	20 802
Total supply	26 513	18 121	10 452	55 086	27 552	17 995	10 595	56 141
Domestic use	25 080	16 501	8 634	50 215	26 319	16 453	9 127	51 900
<i>of which crushing</i>	(24 539)	(14 346)	(7 596)	(46 482)	(25 744)	(14 255)	(8 001)	(48 000)
Exports (to third countries)	600	320	940	1 860	510	275	594	1 379
Total use	25 680	16 821	9 574	52 075	26 829	16 728	9 721	53 278
Ending stocks	833	1 300	878	3 011	722	1 267	874	2 863
Change in stocks	-	-	-	-	-111	-33	-4	-148

Sources : EC – DG AGRI

Soya bean imports (EU)



Oilmeals balance sheet (EU)

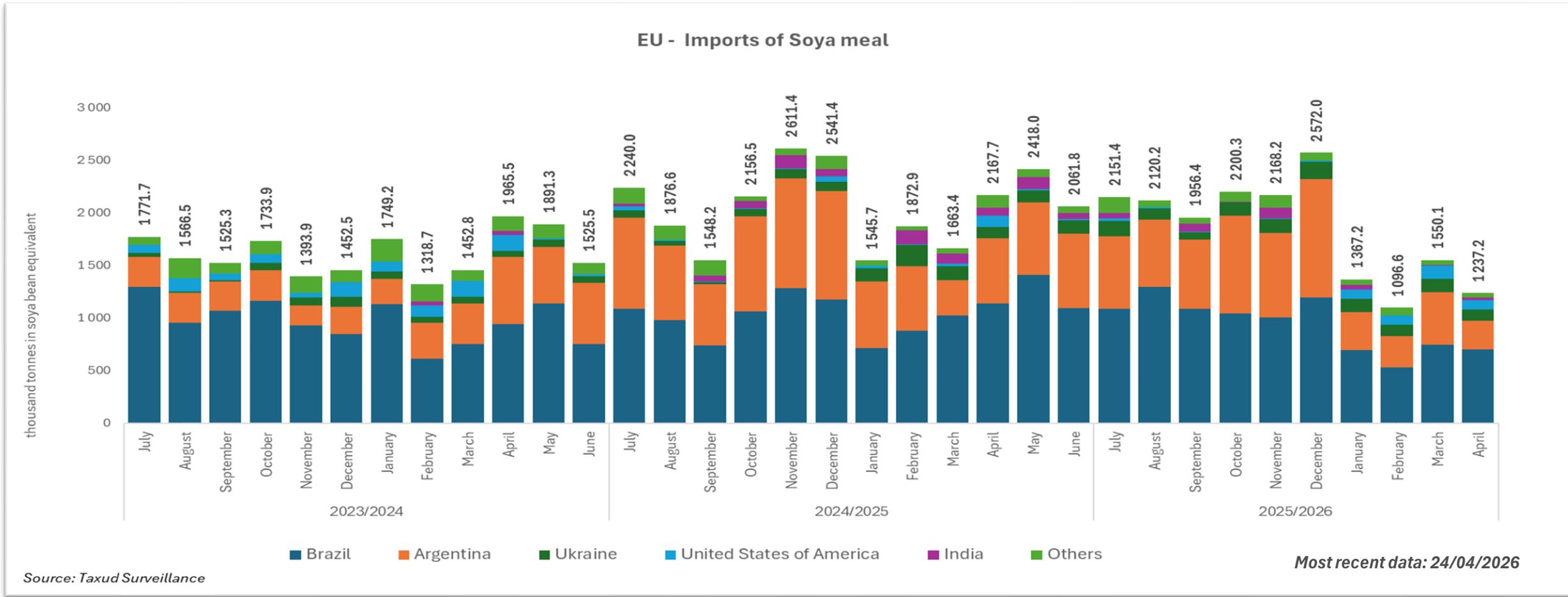
OILSEED MEALS SUPPLY & DEMAND

(thousand tonnes)

<i>last updated: 30/04/2026</i>	2025/26 fc.				2026/27 proj.			
	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	50	342	100	492	50	342	100	492
Usable production	13 987	11 334	4 178	29 499	14 674	11 261	4 401	30 336
Imports (from third countries)	820	17 000	2 200	20 020	605	17 000	2 596	20 201
Total supply	14 857	28 676	6 478	50 011	15 329	28 604	7 097	51 029
Domestic use	13 944	27 824	5 988	47 756	14 435	27 700	6 184	48 319
Exports (to third countries)	863	510	390	1 763	844	561	813	2 218
Total use	14 807	28 334	6 378	49 519	15 279	28 261	6 997	50 537
Ending stocks	50	342	100	492	50	342	100	492
Change in stocks	-	-	-	-	-	-	-	-

Sources : EC – DG AGRI

Soya bean meal imports (EU)



Vegetable oils balance sheet (EU)

VEGETABLE OILS SUPPLY & DEMAND

(thousand tonnes)

	2025/26 fc.					2026/27 proj.				
	Rapeseed	Soya beans	Sunflower	Palm	TOTAL	Rapeseed	Soya beans	Sunflower	Palm	TOTAL
<i>last updated: 30/04/2026</i>										
Beginning stocks	592	175	271	487	1 525	592	175	271	487	1 525
Usable production	10 061	2 869	3 190	0	16 121	10 555	2 851	3 361	0	16 767
Imports (from third countries)	550	700	2 100	2 800	6 150	466	628	2 230	2 533	5 857
Total supply	11 203	3 744	5 561	3 287	23 796	11 613	3 654	5 861	3 020	24 148
Domestic use	10 015	2 929	4 720	2 650	20 315	10 407	2 678	4 844	2 391	20 320
Exports (to third countries)	596	640	570	150	1 956	614	801	747	142	2 303
Total use	10 611	3 569	5 290	2 800	22 271	11 021	3 479	5 590	2 533	22 623
Ending stocks	592	175	271	487	1 525	592	175	271	487	1 525
Change in stocks	0	-	0	-	0	0	-	0	-	0

Sources : EC – DG AGRI

Balance sheets 2025/26 and 2026/27 (EU)

Changes from previous Committee meeting (1)

- This month, minor adjustments are made to the 2025/26 **oilseeds** balance sheet based on the latest TAXUD/COMEXT trade data. **EU imports** are left unchanged at 20.4 million tonnes (6% below the five-year average). Total **EU exports** are marginally revised to reflect an increase of 0.1 million tonnes in sunflower seed exports. Total domestic use is now estimated at 50.2 million tonnes (in line with the five-year average).
- For the **2026/27** season, total EU oilseed imports remain unchanged at 20.8 million tonnes, which is 2% below the five-year average.
- **EU oilseed meal** production for 2025/26 is marginally revised upwards to 29.5 million tonnes, representing a slight decrease compared with the five-year average. **EU imports** of oilseed meals are estimated at 20.0 million tonnes, including 0.8 million tonnes of rapeseed meal. Total EU oilseed meal imports are placed 1.5% above the five-year average.
- For the **2026/27** season, **oilseed meal production** is expected to reach 30.3 million tonnes, which is 3.0% above the five-year average. Based on the five-year trimmed average, EU imports of oilseed meals for the upcoming season are projected at 20.2 million tonnes.

Balance sheets 2025/26 and 2026/27 (EU)

Changes from previous Committee meeting (2)

- **Vegetable oil production** for marketing year **2025/26** is slightly revised from the previous month to 16.1 million tonnes, remaining 1% above the five-year average. Total imports are estimated at 6.2 million tonnes, including 0.6 million tonnes of rapeseed oil.
- For marketing year **2026/27**, **vegetable oil production** is forecast at 16.8 million tonnes, 4% above the five-year average, mainly driven by higher sunflower oil and rapeseed oil output. Total **EU imports** are projected at 5.9 million tonnes, around 25% below the five-year average, reflecting reduced palm oil imports.

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World Oilseeds & Market News



Oilseeds & Protein crops: areas & production (2024/25 & 2025/26)



S&D balance sheets (Oilseeds, Meals, and Oils)

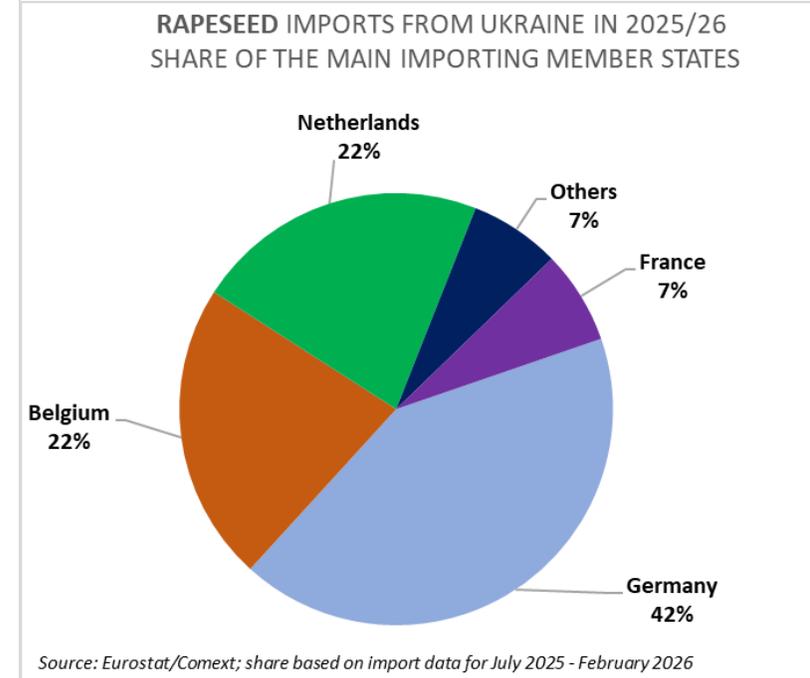
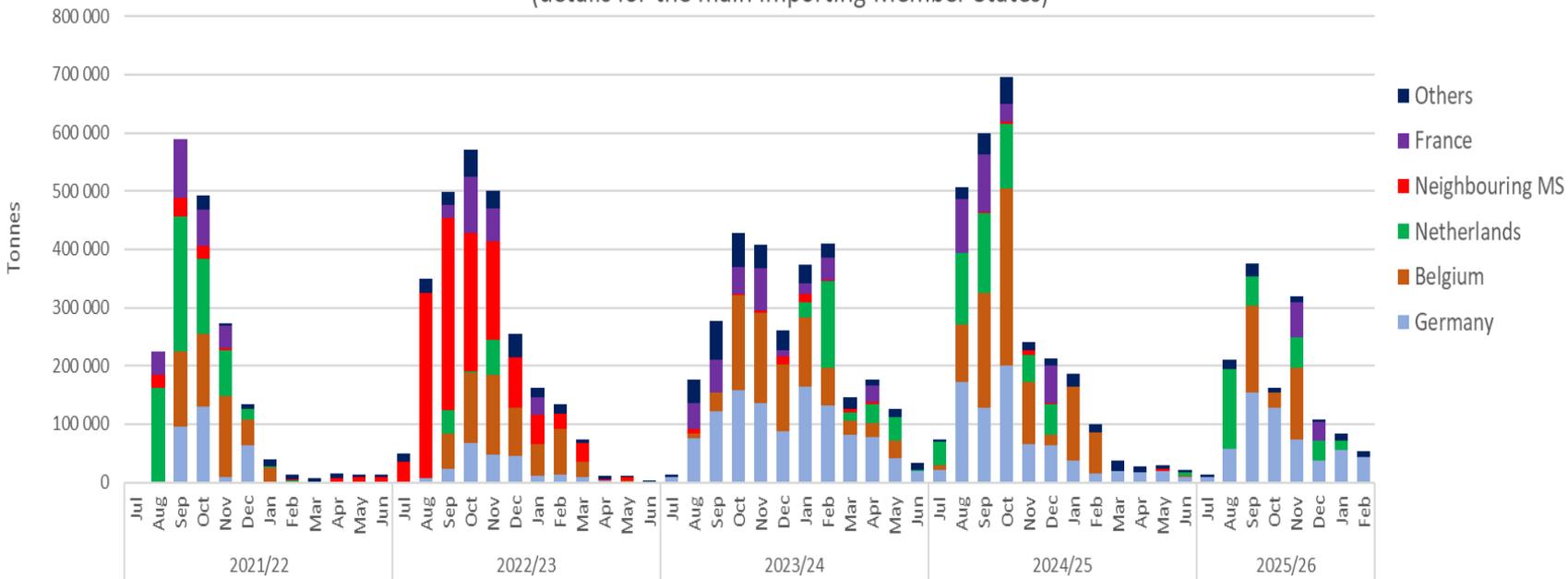


EU imports from Ukraine

EU imports from Ukraine – rapeseed (in tonnes)

(1/5)

EU monthly imports of **rapeseed** from Ukraine
(details for the main importing Member States)

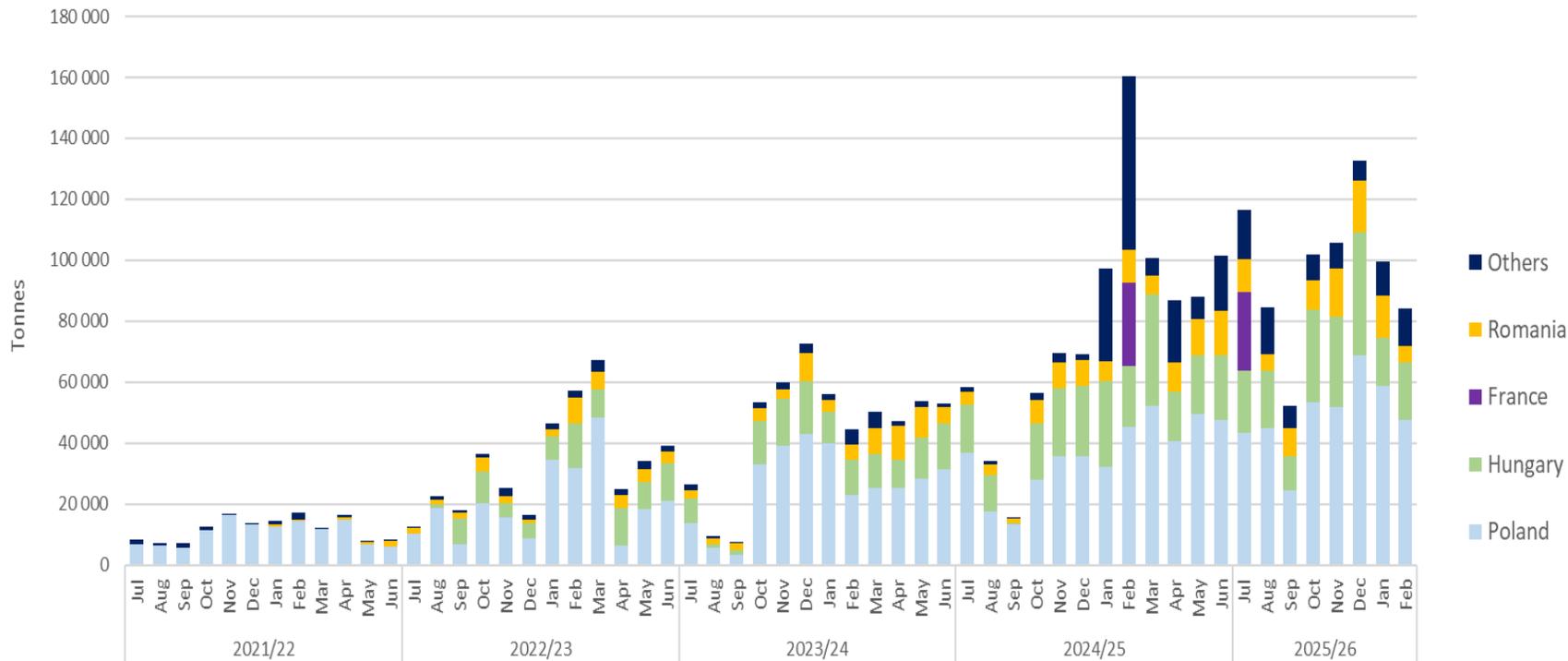


Source: Eurostat/Comext; share based on import data for July 2025 - February 2026

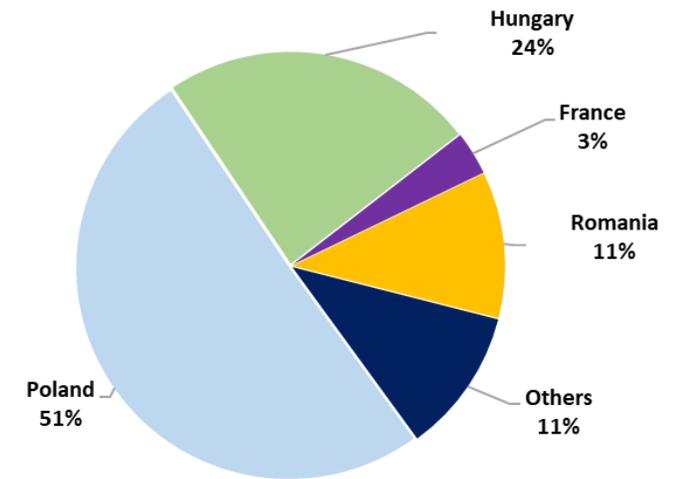
EU imports from Ukraine – soya bean meals (in tonnes)

(3/5)

EU monthly imports of **soya bean meals** from Ukraine
(details for the main importing Member States)



SOYA BEAN MEALS IMPORTS FROM UKRAINE IN
2025/26
SHARE OF THE MAIN IMPORTING MEMBER STATES

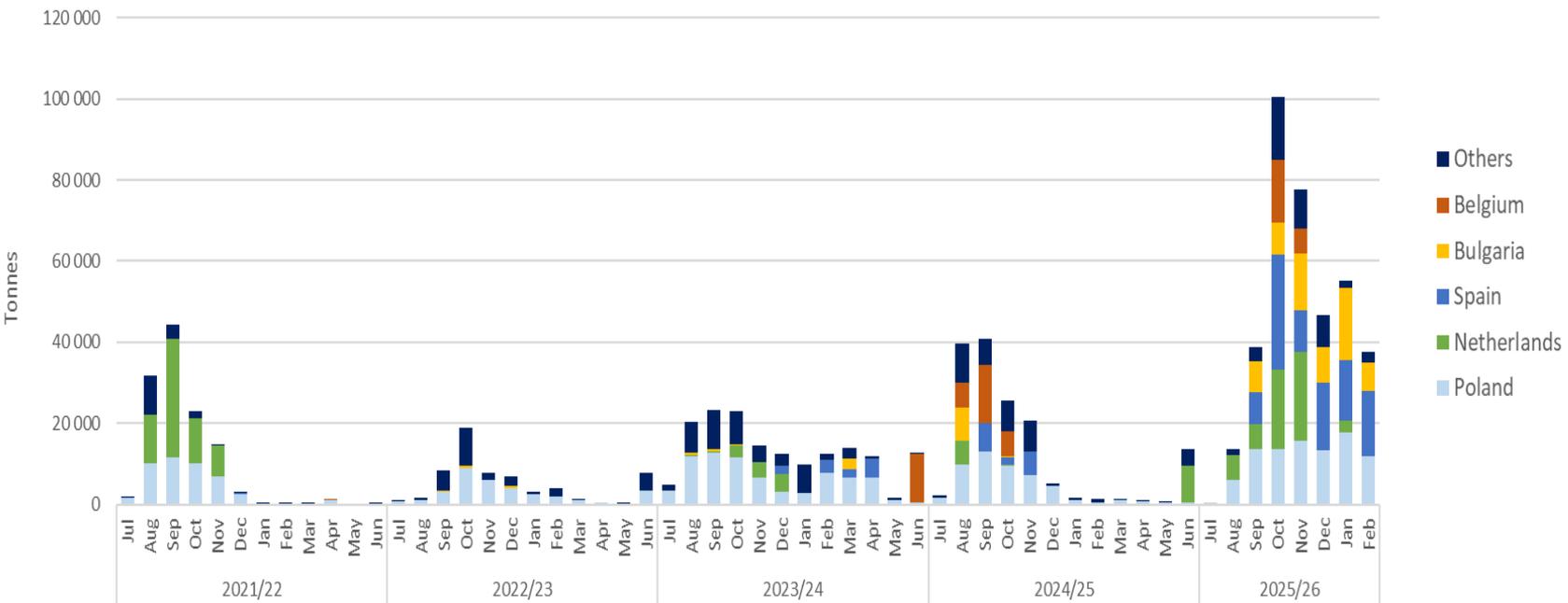


Source: Eurostat/Comext; share based on import data for July 2025 - February 2026

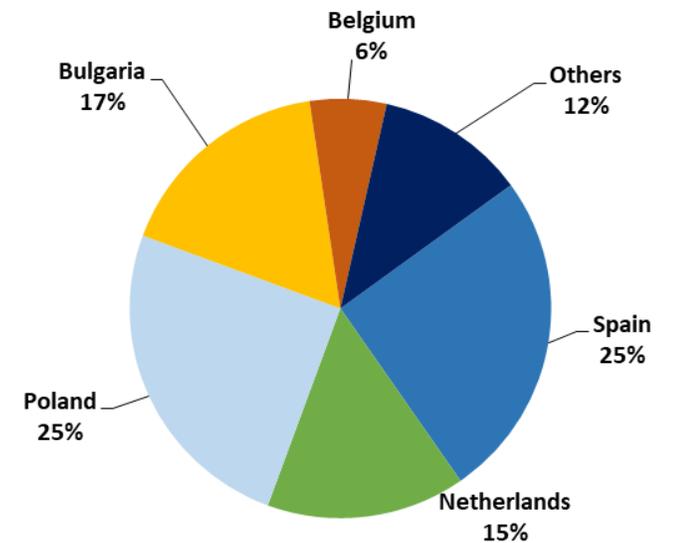
EU imports from Ukraine – rapeseed oils (in tonnes)

(4/5)

EU monthly imports of rapeseed oils from Ukraine
(details for the main importing Member States)



RAPESEED OILS IMPORTS FROM UKRAINE
SHARE OF THE MAIN IMPORTING MEMBER STATES



Source: Eurostat/Comext; share based on import data for July 2025 - February 2026

Thank you!

Market data for the cereals, oilseeds and protein crops are available at the EU Crops Market Observatory
<https://ec.europa.eu/agriculture/market-observatory/crops>

The United Kingdom is no longer a Member State of the European Union, however, where it is deemed relevant (e.g. for comparison purposes), an EU+UK aggregate is still displayed.



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