



Oilseeds and Protein Crops market situation

EXPERT GROUP FOR AGRICULTURAL MARKETS

26 June 2025

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World Oilseeds & Market News



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

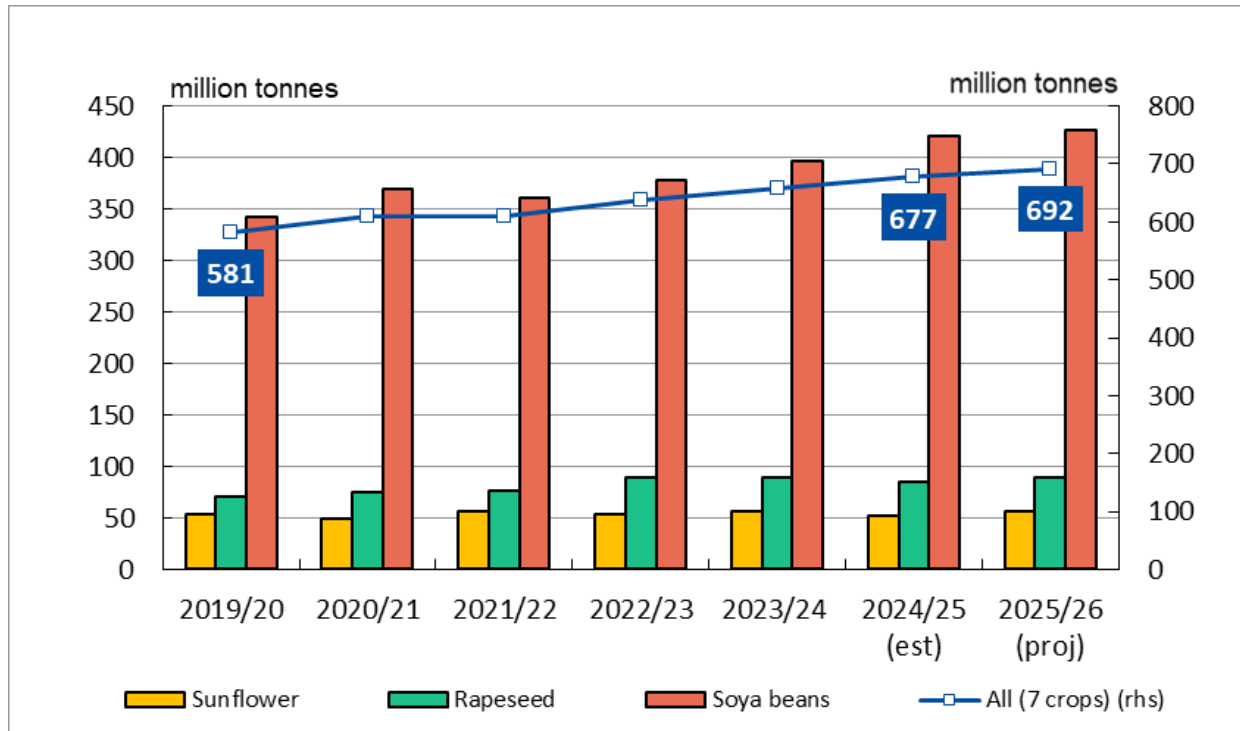


S&D balance sheets (Oilseeds, Meals, Oils, Protein Crops)



EU imports from Ukraine

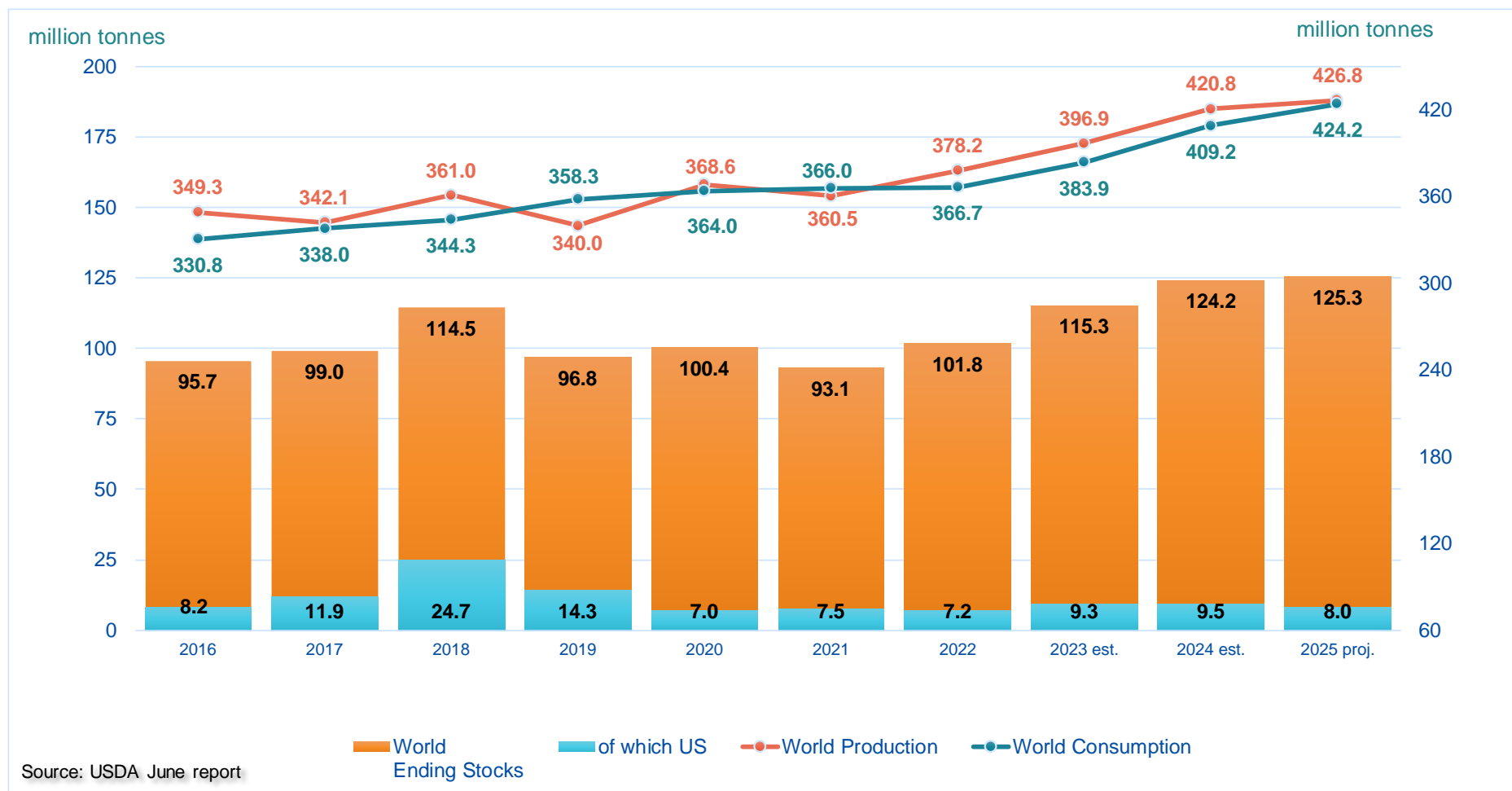
2025/26 World Oilseeds (USDA)



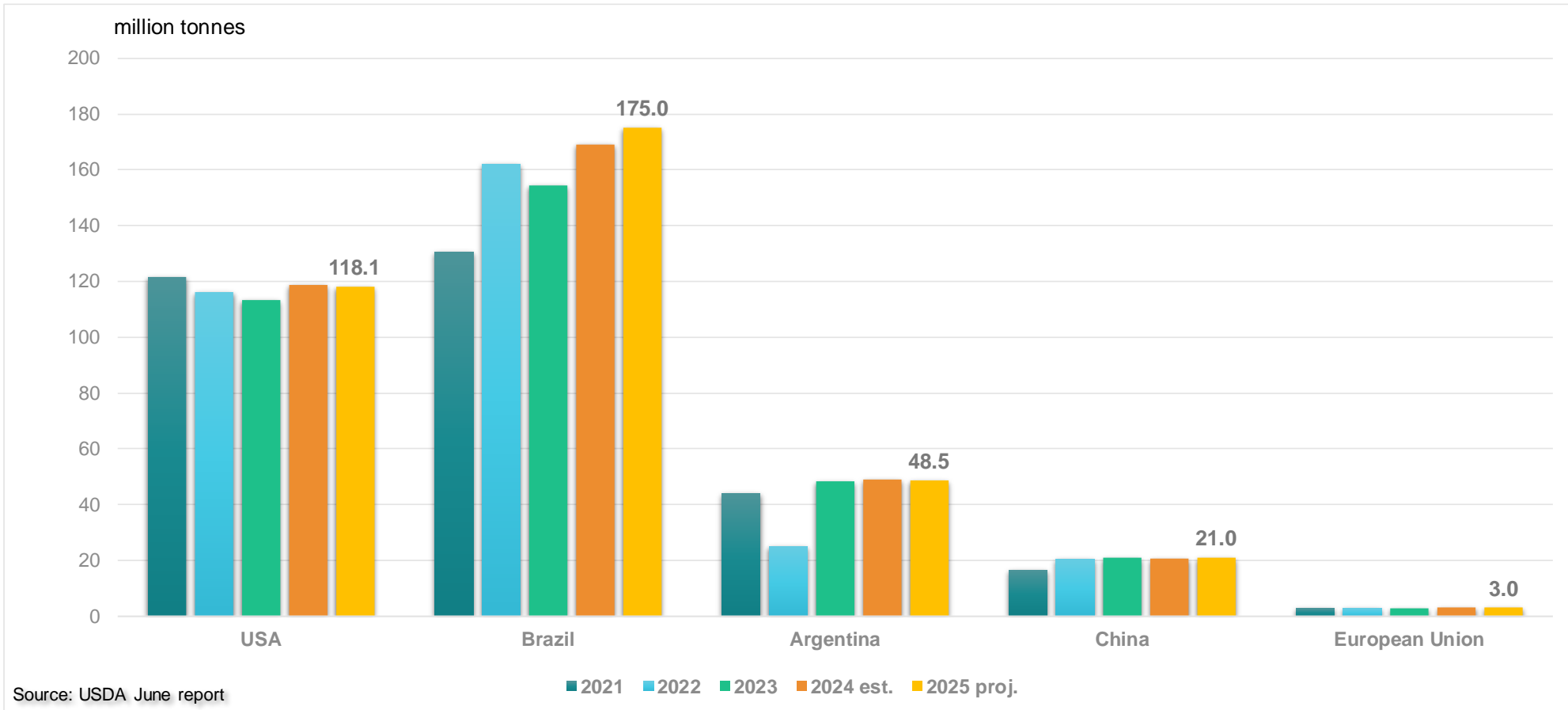
25/26 outlook (changes y/y):

Total Oilseeds:	692 mt (+15)	↑
• Soya beans:	427 mt	↑
• Rapeseed:	90 mt	↑
• Sunflower:	56 mt	↑

World soya: USDA



USDA: soya beans production forecast



World Market

Brazil

- **BR** (*USDA-WASDE monthly report*): **soya bean production** forecast for the 2025/26 season remains steady at 175 million tonnes (+4% increase year-on-year). **Soya meal** output is estimated at 44.8 million tonnes (+2% year-on-year). **Soya oil** production is projected to reach 11.8 million tonnes, also making a 2% year-on-year rise.
- **BR** (*ANEC*): June soya bean **exports** seen at 14.4 million tonnes, soya meal shipments estimated at 2.0 million tonnes.
- **BR** (*USDA-WASDE monthly report*): 2025/26 **soya bean exports** projected at 112.0 million tonnes (+7% year-on-year), and **soya meal** at 23.2 million tonnes (+1% year-on-year).

World Market USA

- **USA** (*USDA - WASDE monthly report*): **soya bean production** for the marketing year 2025/26 remains unchanged at 118.1 million tonnes, marginally lower year-on-year due to a reduction in cultivated area (33.5 million hectares).
- **USA** (*USDA grain export inspections*): w/e 19 June: 2025/26 cumulative **soya bean export inspections** at 45.6 million tonnes (+11% on one year ago).
- **USA** (*USDA Crop Progress report*): as at 22 June, 2025/26 soya beans **plantings** forecast at 96% (96% the same period previous year), sunflower seed at 91% (92% the same period previous year). Soya bean condition rated at 66% (67% year ago).

World Market

Argentina

- **ARG** (*IGC citing Ministry crop report*): 2024/25 **soya bean production** is forecast at 49.9 million tonnes (48.2 million tonnes previous year). **Sunflower seed output** estimated at 5.1 million tonnes (3.9 million tonnes previous year).
- **ARG** (*IGC/Buenos Aires Grains Exchange*): in w/e 18 June, 2024/25 **soya bean harvesting** advanced to 97% complete (99% same period in the previous year).
- **ARG** (*USDA-WASDE monthly report*): 2024/25 **soya bean output** is expected at 48.5 million tonnes (-1% year-on-year).

World Market Canada

- **Canada** (AAFC, *Outlook for Principal Field Crops*): total **canola exports** for marketing year 2024/25 is revised up by 0.5 million tonnes from last month to 9.0 million tonnes (35% above the previous year and 11% above the long-term average).
- **Canada** (AAFC, *Outlook for Principal Field Crops*): **2025/26 canola plantings** are nearing completion, with production estimated at 18.0 million tonnes. Canola **crush** is projected lower year-on-year, at 11.0 million tonnes, reflecting increased uncertainty over tariff measures and biofuel mandates.

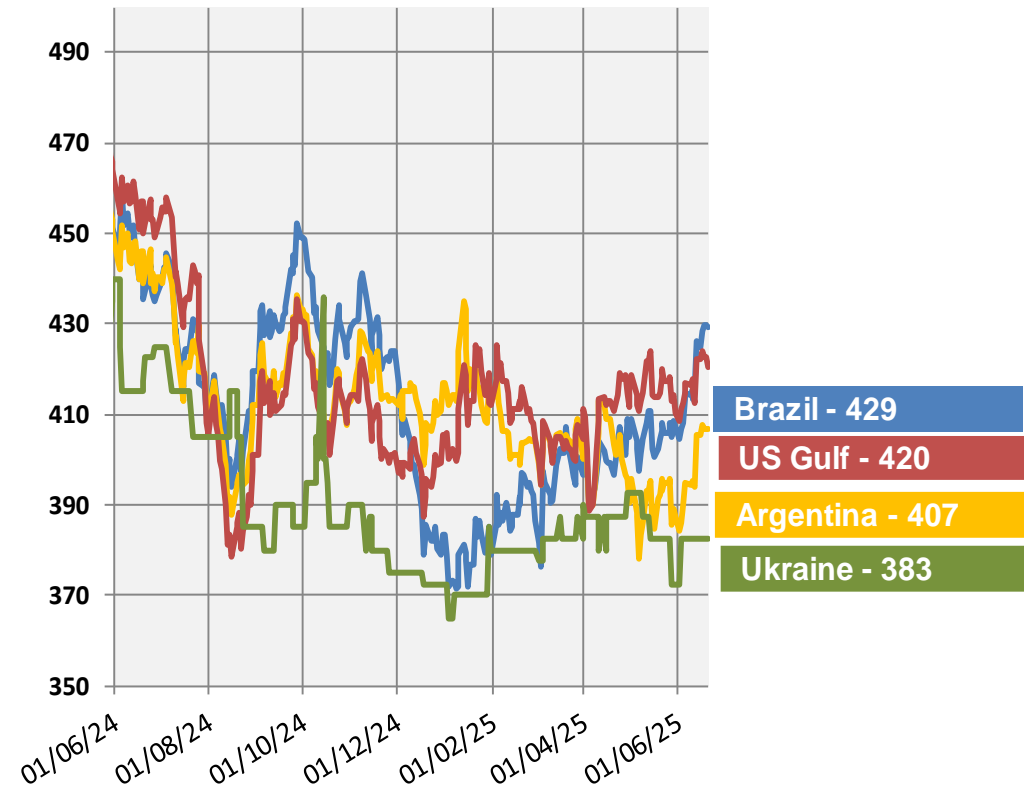
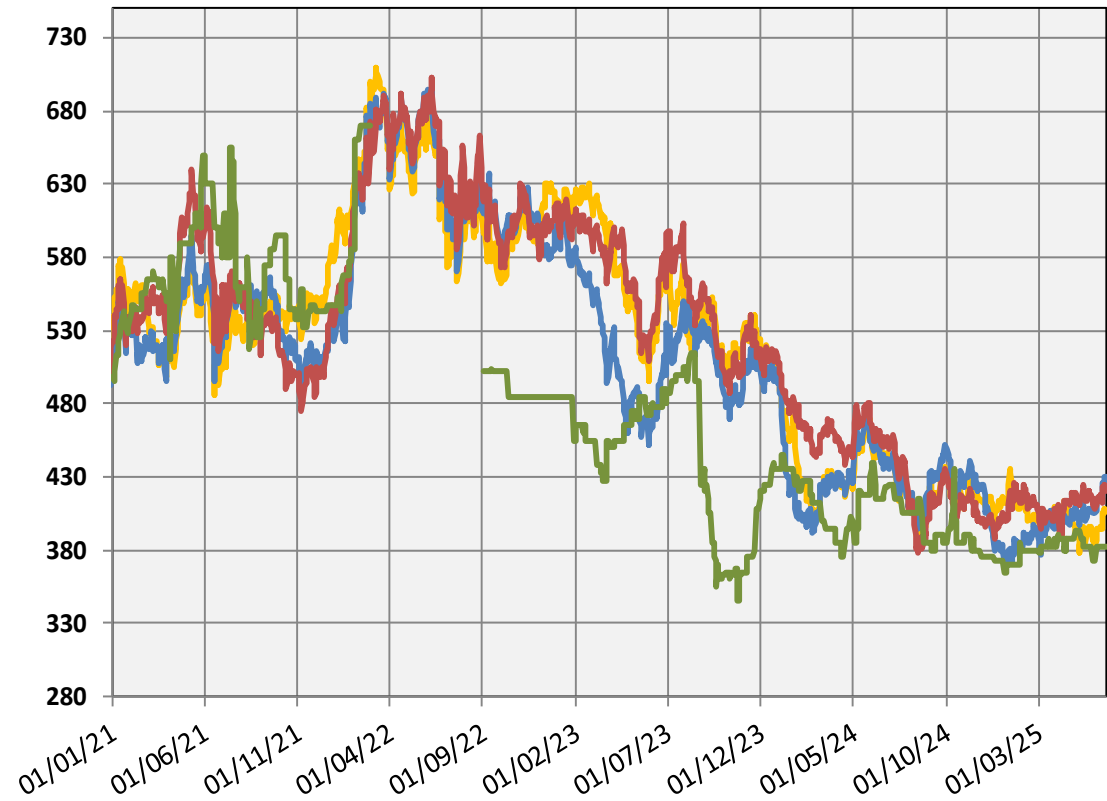
World Market

Ukraine

- **UKR** (*TAXUD surveillance data*): week ending 22 June of marketing year 2024/25 – EU imports of **soya bean** are estimated at 1.5 million tonnes (1.0 million tonnes the same period previous year), while **rapeseed** are forecast at 2.4 million tonnes (3.2 million tonnes the same period previous year). **Sunflower seed oil** imports from Ukraine are at 2.2 million tonnes (2.7 million tonnes the same period previous year).
- **UKR** (*MARS - Monitoring Agricultural Resources*): as at 16 June, 2025/26 **rapeseed area** estimated at 1.3 million hectares (+8 year-on-year), with output at 3.6 million tonnes (+3% year-on-year). **Sunflower seed** area is projected at 4.8 million hectares (+2% year-on-year), with production at 11.0 million tonnes (+6% year-on-year). **Soya beans** area is seen at 3.0 million hectares (+8% year-on-year), with output at 7.0 million tonnes (+6% year-on-year).

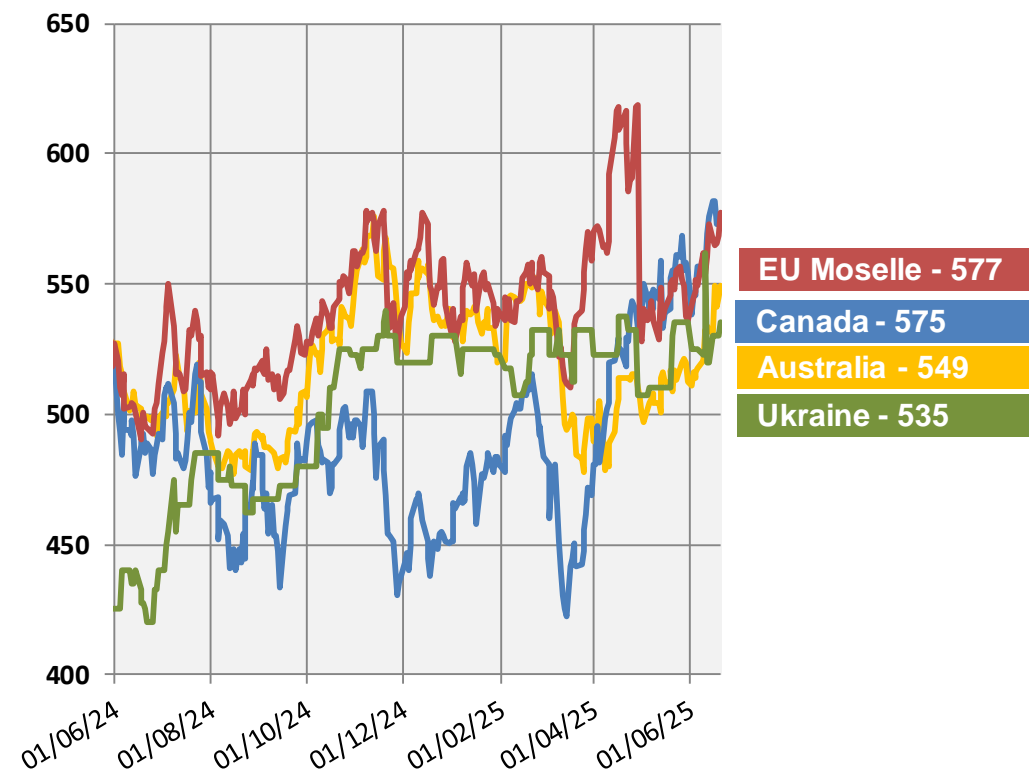
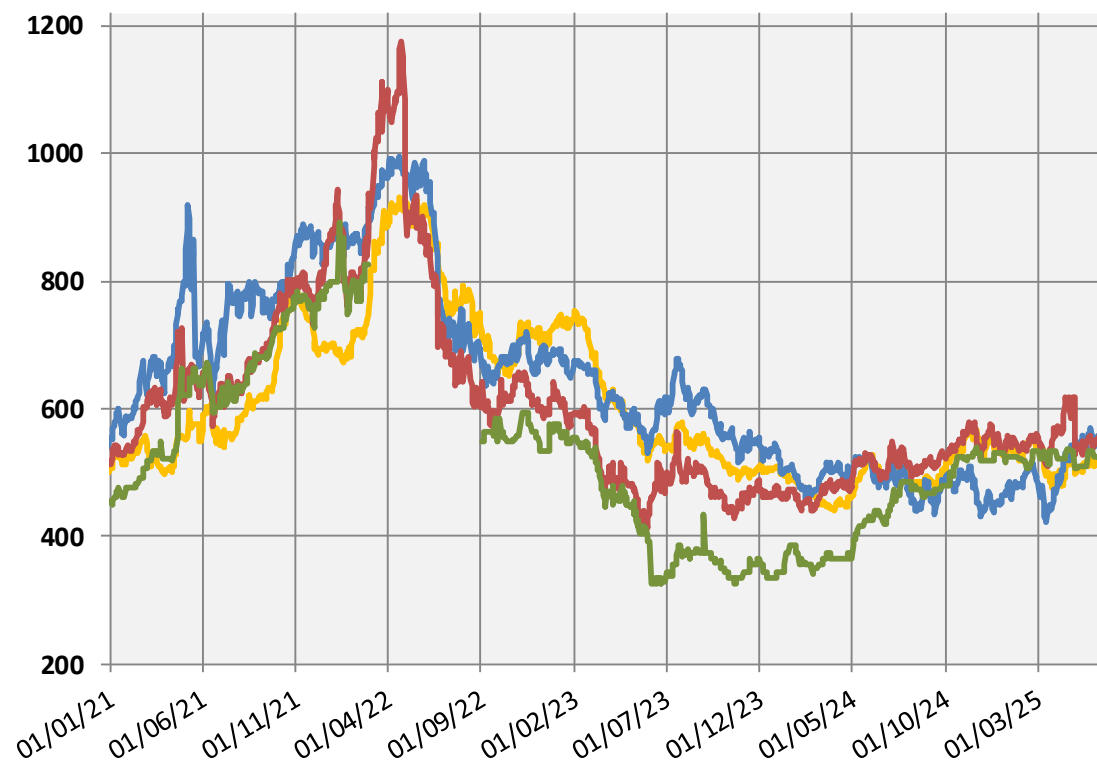
- **RUS** (*IGC citing Ag. Ministry*): as 9 June, 2025/26 **sunflower seed sowings** estimated to be complete on 11.2 million hectares (103% of intended area), and **soya beans** on 4.3 million hectares (97% of intended area).

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



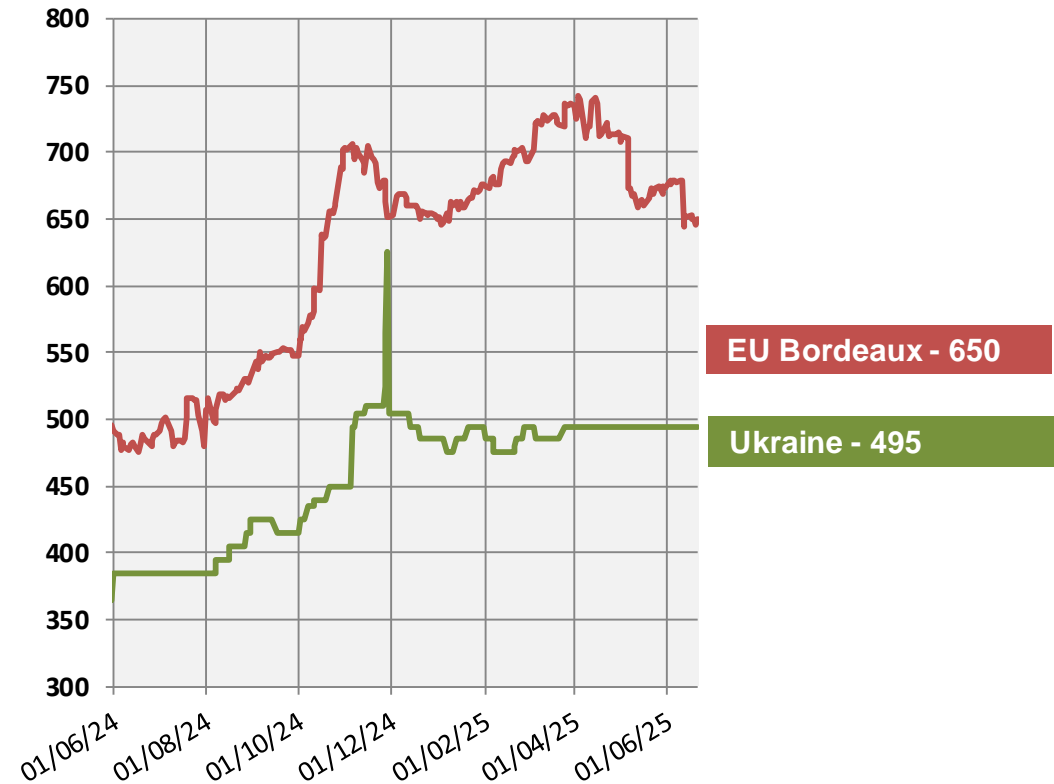
Source: International Grains Council
Latest prices referring to: 20/06/2025

World export prices for rapeseed – (USD/tonne)



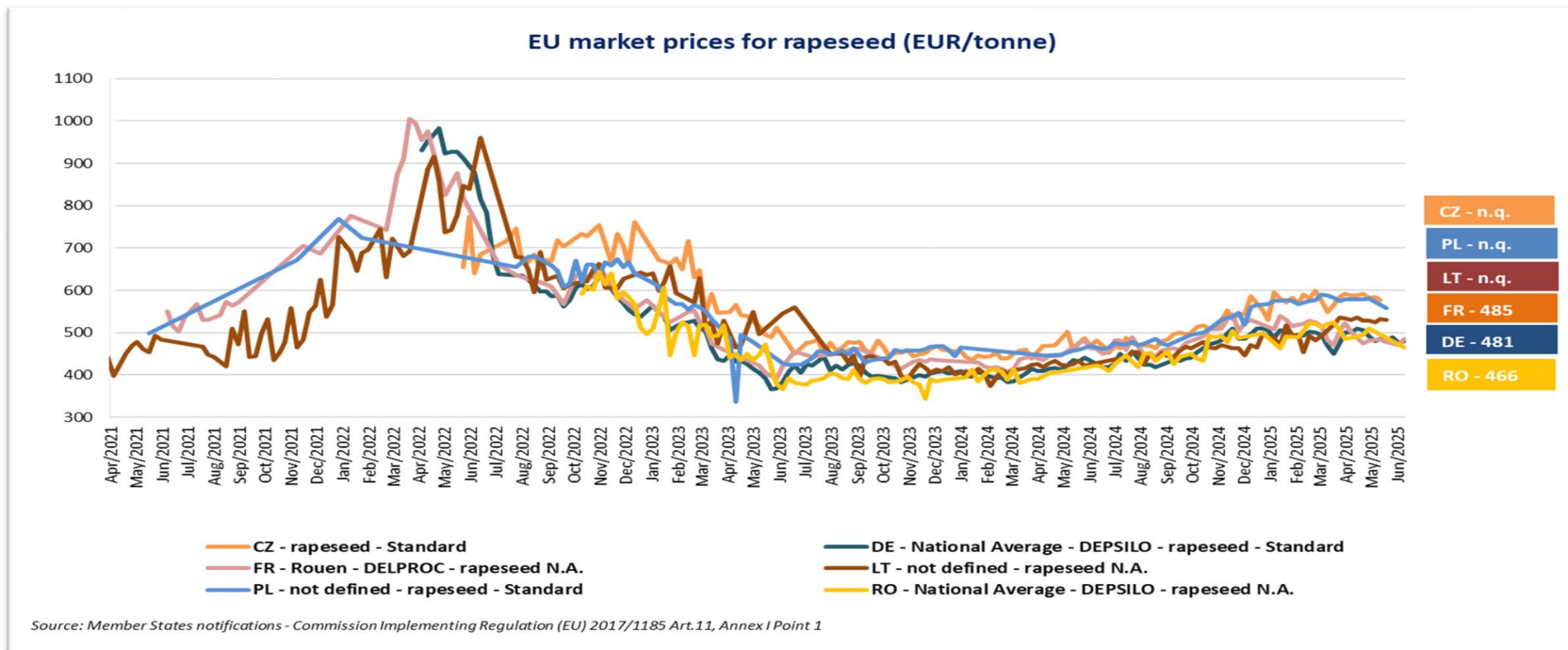
Source: International Grains Council
Latest prices referring to: 20/06/2025

World export prices for sunflower – (USD/tonne)

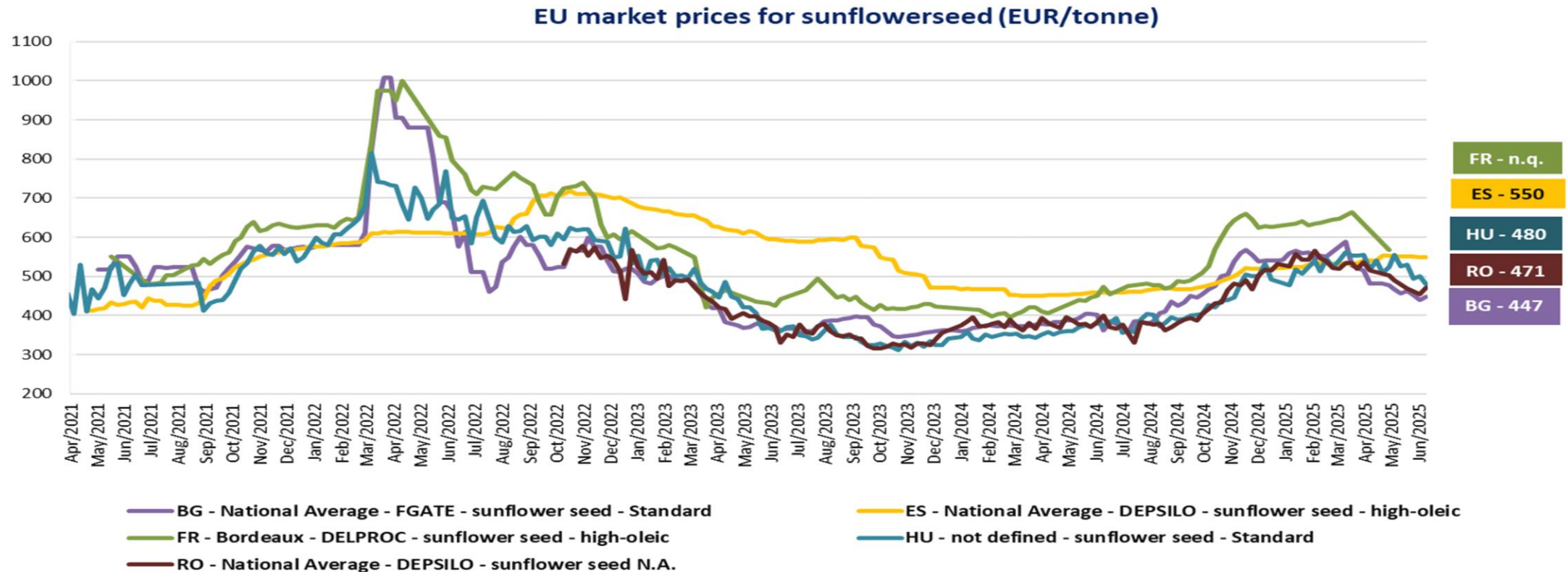


Source: International Grains Council
Latest prices referring to: 20/06/2025

EU prices for rapeseed – (EUR/tonne)



EU prices for sunflower – (EUR/tonne)



Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

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World Oilseeds & Market News



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



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



EU imports from Ukraine

EU oilseeds 2025/26 projections

EU OILSEEDS AREA

(million hectares)

	5-year trimmed average	2024/25	June	2025/26 vs. 2024/25 (%)	vs. 5-y AVG (%)
Rapeseed	5.64	5.70	5.95	4.5	5.6
Sunflower	4.63	4.80	4.50	-6.3	-2.7
Soya Beans	1.01	1.12	0.99	-11.6	-2.0
TOTAL	11.43	11.66	11.49	-1.5	0.5

EU OILSEEDS PRODUCTION

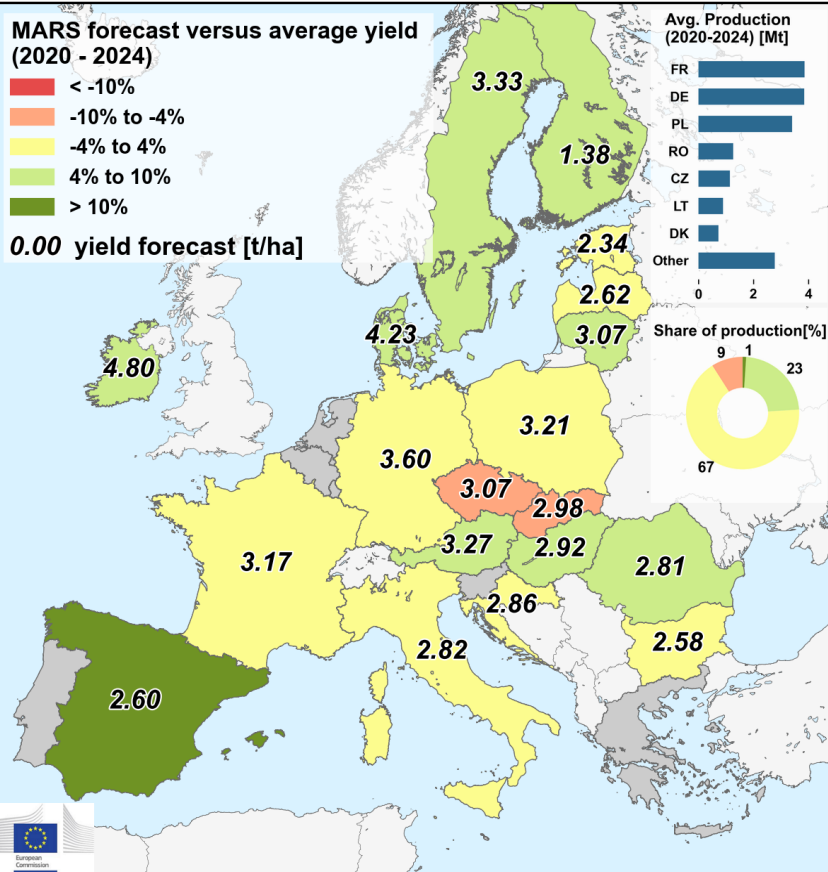
(million tonnes)

	5-year trimmed average	2024/25	June	2025/26 vs. 2024/25 (%)	vs. 5-y AVG (%)
Rapeseed	17.77	16.69	18.92	13.4	6.5
Sunflower	9.37	8.29	9.48	14.4	1.2
Soya Beans	2.69	2.98	2.80	-6.1	4.3
TOTAL	29.99	28.02	31.27	11.6	4.3

Sources : EC - DG AGRI.

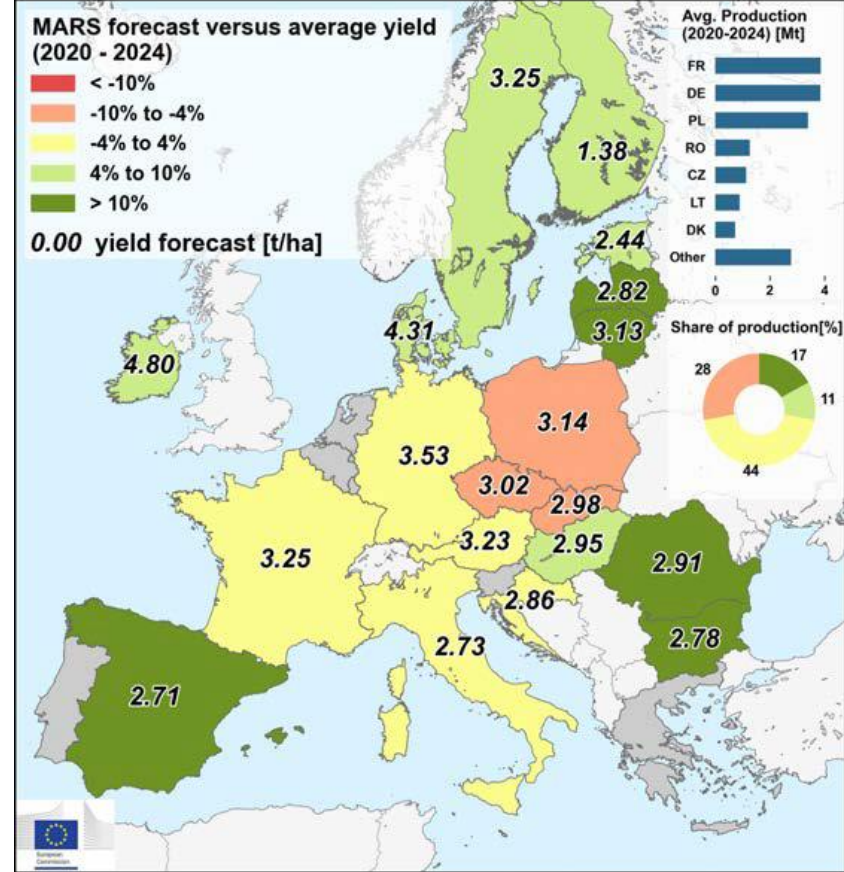
JRC - EU rapeseed yield forecast 2025/26

Rapeseed - yield forecast 2025



MARS Bulletin Vol. 33 No.4 (2025)

Rapeseed - yield forecast 2025



MARS Bulletin Vol. 33 No.5 (2025)

EU protein crops 2025/26 projections

EU PROTEIN CROPS AREA

(million hectares)

	5-year trimmed average	2024/25	June	2025/26 vs. 2024/25 (%)	vs. 5-y AVG (%)
Field peas	0.85	1.01	0.84	-16.5	-1.1
Broad beans	0.47	0.50	0.48	-4.5	2.8
Sweet lupins	0.24	0.27	0.24	-11.1	0.0
TOTAL	1.54	1.77	1.56	-12.3	1.1

EU PROTEIN CROPS PRODUCTION

(million tonnes)

	5-year trimmed average	2024/25	June	2025/26 vs. 2024/25 (%)	vs. 5-y AVG (%)
Field peas	1.90	2.08	2.00	-4.00	5.40
Broad beans	1.24	1.39	1.32	-5.40	6.60
Sweet lupins	0.39	0.48	0.39	-18.80	1.20
TOTAL	3.52	3.96	3.71	-6.3	5.4

Sources : EC - DG AGRI.

EU oilseeds and protein crops 2025/26 projections

2025/2026

MY(1000 tonnes/hectares)

		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	5 953	9	101	342	158	1 103	76	11	4	105	1 336	18	23	0	133	343	2	133	2	22	1 030	0	703	3	126	57	112
	Yield	3.18	3.63	2.78	3.02	4.31	3.53	2.44	4.80	2.09	2.71	3.25	2.86	2.73		2.82	3.13	3.20	2.95	3.46	3.23	3.14		2.91	2.69	2.98	1.38	3.08
	Production	18 924	33	281	1 032	681	3 900	185	53	8	284	4 334	51	64	0	374	1 074	8	393	6	72	3 236	0	2 045	8	377	78	346
Sunflower	Area	4 503	0	874	18	0	61	0	0	86	731	674	51	104	0	0	0	0	668	1	24	19	6	1 120	1	67	0	0
	Yield	2.11		2.20	2.58		2.41		0.00	2.50	1.18	2.32	2.97	2.47				1.86	2.62	0.00	2.60	2.32	1.80	2.04	2.30	2.50		
	Production	9 480	0	1 922	47	0	146	0	0	215	861	1 564	151	257	0	0	0	0	1 753	0	62	45	10	2 279	1	166	0	0
Soja	Area	988	0	3	25	0	41	0	0	1	2	150	88	308	0	0	2	0	62	0	85	15	0	142	2	61	0	0
	Yield	2.83		1.26	2.40		2.92			0.81	3.05	2.58	2.78	3.46			1.36	0.00	2.53	0.00	2.92	2.47		2.22	2.65	2.38		
	Production	2 800	0	4	60	0	119	0	0	1	6	387	244	1 068	0	0	2	0	158	0	248	38	0	316	6	144	0	0
Linseed	Area	42	0	1	2	0	4	0	0	0	1	23	0	0	0	0	1	0	2	0	1	2	0	2	0	1	1	2
	Yield	1.63	0.00	0.91	1.30		1.79	1.03	0.00	3.09	0.77	1.85				1.08	0.83		1.30		1.21	1.48		1.49		0.98	0.89	1.56
	Production	69	0	1	2	0	8	0	0	0	1	42	0	0	0	0	1	0	2	0	2	4	0	2	0	1	1	3
Total oilseeds	Area	11 486	9	980	386	158	1 209	76	11	92	838	2 183	156	436	0	133	346	3	865	2	133	1 066	6	1 967	6	254	57	114
	Yield	2.72	3.60	2.25	2.95	4.31	3.45	2.44	4.77	2.46	1.37	2.90	2.85	3.19		2.82	3.12	3.07	2.67	2.38	2.90	3.11	1.80	2.36	2.64	2.71	1.37	3.06
	Production	31 273	33	2 208	1 140	681	4 173	185	53	225	1 152	6 327	446	1 389	0	374	1 077	8	2 305	6	384	3 321	10	4 642	15	688	78	349
Field peas	Area	841	1	12	42	12	139	39	1	20	145	112	1	14	0	24	68	0	12	0	6	27	0	88	0	12	42	23
	Yield	2.38	3.10	2.16	2.30	3.92	3.02	2.15	4.57	1.56	1.70	2.89	2.20	2.57	1.25	2.38	2.34	3.01	2.34		2.22	2.25		1.82	2.31	2.24	2.54	2.88
	Production	2 000	2	25	97	49	421	83	3	31	246	323	2	37	0	57	159	1	27	0	14	61	0	159	1	28	106	68
Broad beans	Area	479	1	0	1	21	75	12	13	3	24	90	2	54	0	31	72	0	1	3	6	35	7	8	0	0	6	15
	Yield	2.75	4.45		2.22	4.17	3.66	2.12	5.81	2.82	1.40	2.46	1.56	1.95	2.84	3.16	2.80	2.40	1.37	0.00	2.47	2.76	0.54	1.01		0.86	1.75	2.91
	Production	1 319	5	0	3	89	273	25	75	7	34	221	3	105	0	97	201	0	1	0	15	97	4	8	0	0	11	44
Lupins	Area	236	0	0	2	0	27	0	0	13	3	5	0	1	0	0	4	0	0	0	1	173	8	0	0	0	0	0
	Yield	1.66			1.28		1.77			1.31	0.88	2.17		1.50		1.33	1.08	0.00	1.19		1.56	1.76	0.00	1.23		0.99		
	Production	391	0	0	2	0	47	0	0	17	2	11	0	1	0	0	5	0	0	0	1	304	0	0	0	0	0	0
Total protein crops	Area	1 556	2	12	45	34	241	51	14	35	172	207	3	69	0	55	144	0	12	3	13	235	15	95	0	13	48	38
	Yield	2.38	3.92	2.16	2.26	4.08	3.08	2.15	5.74	1.56	1.64	2.68	1.73	2.08	2.23	2.82	2.53	2.85	2.28	0.00	2.31	1.97	0.25	1.75	2.31	2.19	2.44	2.89
	Production	3 710	7	25	102	138	741	108	78	55	283	555	5	143	0	154	365	1	28	0	29	462	4	167	1	28	117	111
Oilseeds and protein crops	Area	13 042	11	991	432	192	1 450	127	25	127	1 010	2 390	159	505	0	187	490	3	877	5	145	1 302	20	2 062	6	267	105	153
	Yield	2.68	3.65	2.25	2.88	4.27	3.39	2.32	5.31	2.21	1.42	2.88	2.83	3.03	2.23	2.82	2.94	3.05	2.66	1.09	2.84	2.91	0.68	2.33	2.62	2.68	1.86	3.01
	Production	34 983	40	2 233	1 158	820	4 914	294	132	280	1 435	6 882	451	1 532	0	528	1 442	9	2 334	6	413	3 784	14	4 810	16	716	196	460

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World Oilseeds & Market News



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



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



EU imports from Ukraine

Oilseeds balance sheet (EU)

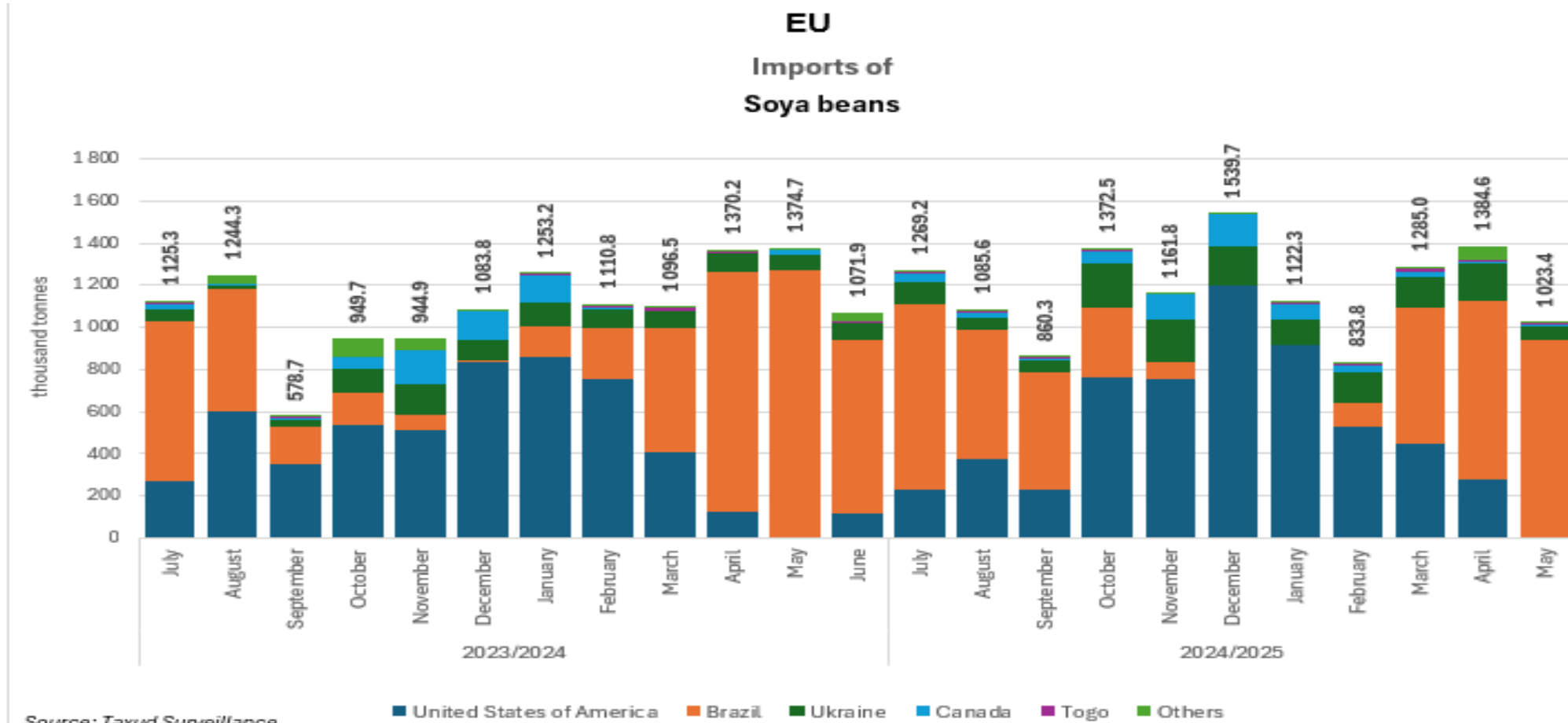
OILSEEDS SUPPLY & DEMAND

(thousand metric tonnes)

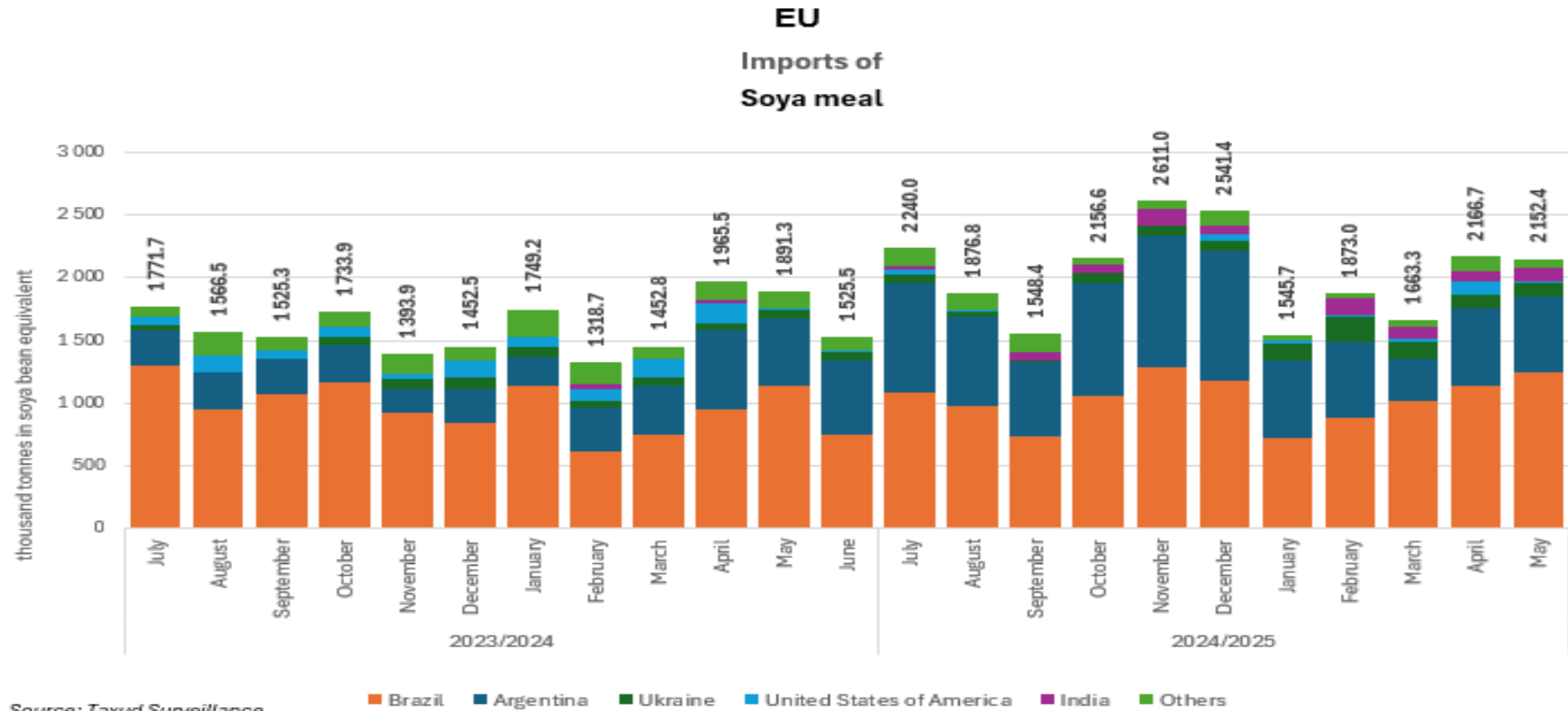
	2024/25 fc.				2025/26 proj.			
<i>last updated: 26/6/2025</i>	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	833	1 300	878	3 011	833	1 300	878	3 011
Usable production	16 688	2 982	8 286	27 957	18 924	2 800	9 480	31 204
Area (thousand ha)	5 696	1 117	4 805	11 619	5 953	988	4 503	11 444
Yield (tonnes/ha)	2.93	2.67	1.72	2.41	3.18	2.83	2.11	2.73
Imports (from third countries)	6 978	14 331	629	21 938	5 778	14 231	979	20 988
Total supply	24 500	18 613	9 793	52 906	25 536	18 331	11 336	55 203
Domestic use	23 278	16 919	8 339	48 535	24 263	16 797	9 923	50 983
of which crushing	(22 784)	(14 747)	(7 282)	(44 813)	(23 741)	(14 604)	(8 730)	(47 074)
Exports (to third countries)	389	394	576	1 359	439	234	536	1 209
Total use	23 667	17 313	8 915	49 895	24 703	17 031	10 459	52 192
Ending stocks	833	1 300	878	3 011	833	1 300	878	3 011
Change in stocks	-	-	-	-	-	-	-	-

Sources : EC – DG AGRI

Soya bean imports (EU)



Soya bean meal imports (EU)



Oilmeals balance sheet (EU)

OILSEED MEALS SUPPLY & DEMAND

(thousand metric tonnes)

	2024/25 fc.				2025/26 proj.			
<i>last updated: 26/6/2025</i>	Rapeseed	Soya beans	Sunflower	TOTAL	Rapeseed	Soya beans	Sunflower	TOTAL
Beginning stocks	50	342	100	492	50	342	100	492
Usable production	12 987	11 650	4 005	28 642	13 532	11 537	4 801	29 870
Imports (from third countries)	523	18 667	2 715	21 905	623	16 367	2 815	19 805
Total supply	13 560	30 659	6 820	51 039	14 205	28 246	7 717	50 168
Domestic use	12 760	29 805	6 345	48 910	13 405	27 192	6 781	47 379
Exports (to third countries)	750	512	375	1 637	750	712	835	2 297
Total use	13 510	30 317	6 720	50 547	14 155	27 904	7 617	49 675
Ending stocks	50	342	100	492	50	342	100	492
Change in stocks	-	0	-	0	-	-	-	-

Sources : EC – DG AGRI

Vegetable oils balance sheet (EU)

VEGETABLE OILS SUPPLY & DEMAND

(thousand metric tonnes)

	2024/25 fc.					2025/26 proj.				
<i>last updated: 26/6/2025</i>	Rapeseed	Soya beans	Sunflower	Palm	TOTAL	Rapeseed	Soya beans	Sunflower	Palm	TOTAL
Beginning stocks	592	175	271	488	1 525	592	175	271	487	1 525
Usable production	9 342	2 949	3 058	0	15 349	9 734	2 921	3 666	0	16 321
Imports (from third countries)	301	456	2 345	2 800	5 901	441	506	2 117	2 500	5 564
Total supply	10 234	3 580	5 674	3 288	22 776	10 766	3 602	6 055	2 987	23 410
Domestic use	9 057	2 655	4 700	2 398	18 810	9 589	2 486	4 910	2 348	19 334
Exports (to third countries)	585	750	703	402	2 441	585	940	873	152	2 551
Total use	9 642	3 405	5 403	2 800	21 251	10 174	3 427	5 784	2 500	21 884
Ending stocks	592	175	271	487	1 525	592	175	271	487	1 525
Change in stocks	0	-	0	0	0	0	-	0	-	0

Sources : EC – DG AGRI

Protein Crops balance sheet (EU)

PROTEIN CROPS SUPPLY & DEMAND

(thousand metric tonnes)

	2025/26 forecast								
	Peas	Broad beans	Sweet lupins	Chick peas	Lentils	Other dry pulses	TOTAL	TOTAL 24/25	Change 24/25
<i>last updated 26/06/2025</i>									
Beginning stocks	-	-	-	-	-	-	-	-	-
Usable production	2 000	1 319	391	176	115	787	4 787	5 271	-9.2%
Imports	577	128	206	138	230	406	1 685	1 669	1.0%
Total supply	2 577	1 446	597	314	345	1 193	6 472	6 939	-6.7%
Domestic use	2 355	1 135	597	302	338	1 166	5 892	6 369	-7.5%
- Food	(796)	(180)	(6)	(302)	(338)	(517)	(2 139)	(2 202)	-2.9%
- Feed	(1 559)	(955)	(591)	(0)	(0)	(649)	(3 754)	(4 166)	-9.9%
Exports	222	311	0	12	7	27	579	571	1.5%
Ending stocks	-	-	-	-	-	-	-	-	-

sources: EC - DG AGRI

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



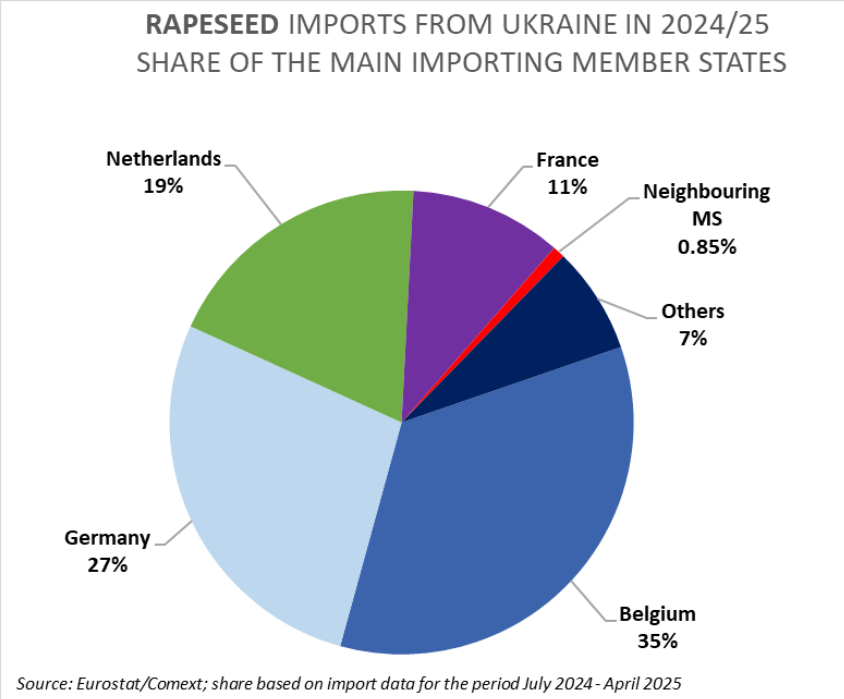
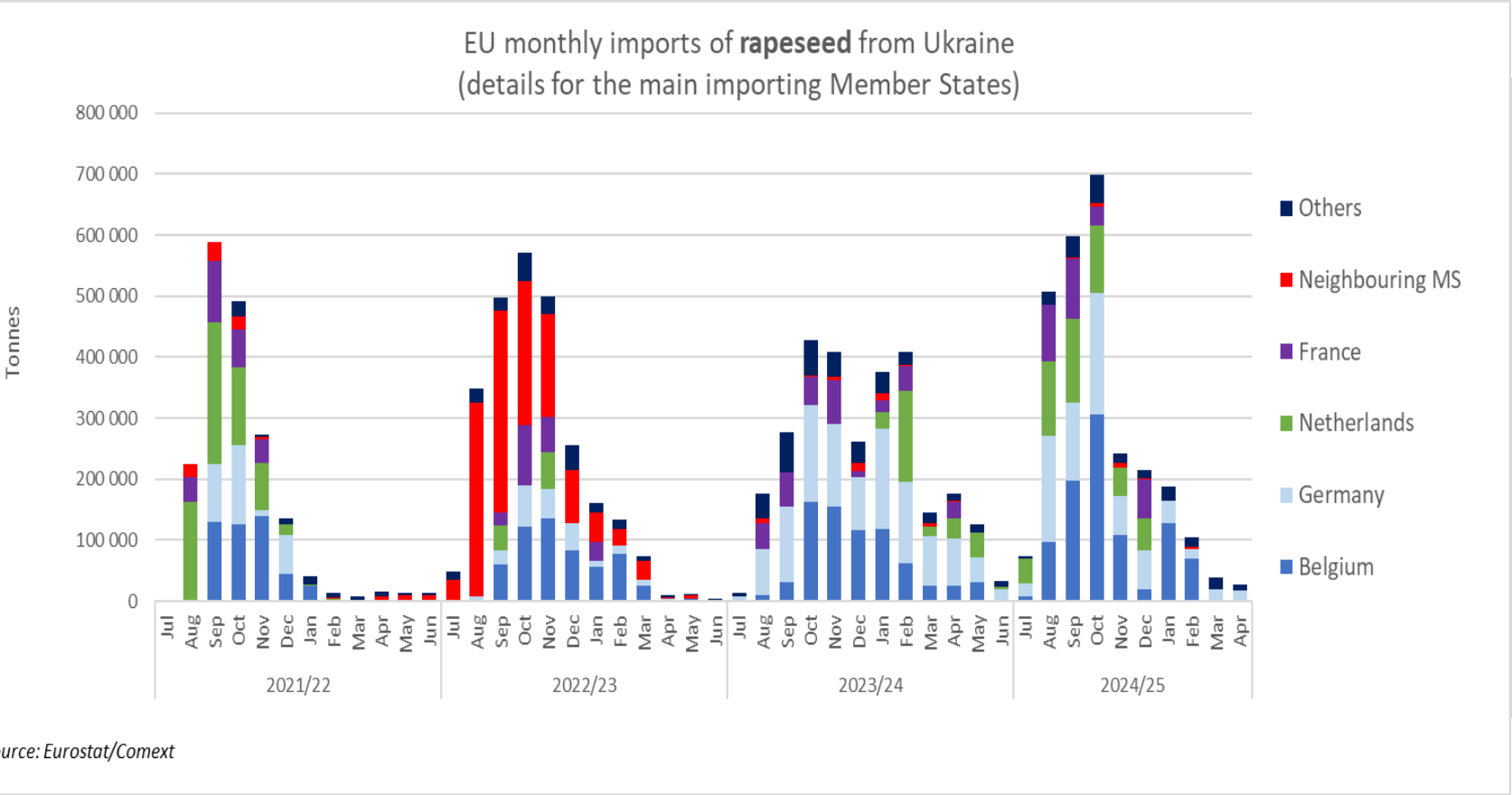
S&D balance sheets (Oilseeds, Meals, Oils, Protein Crops)



EU imports from Ukraine

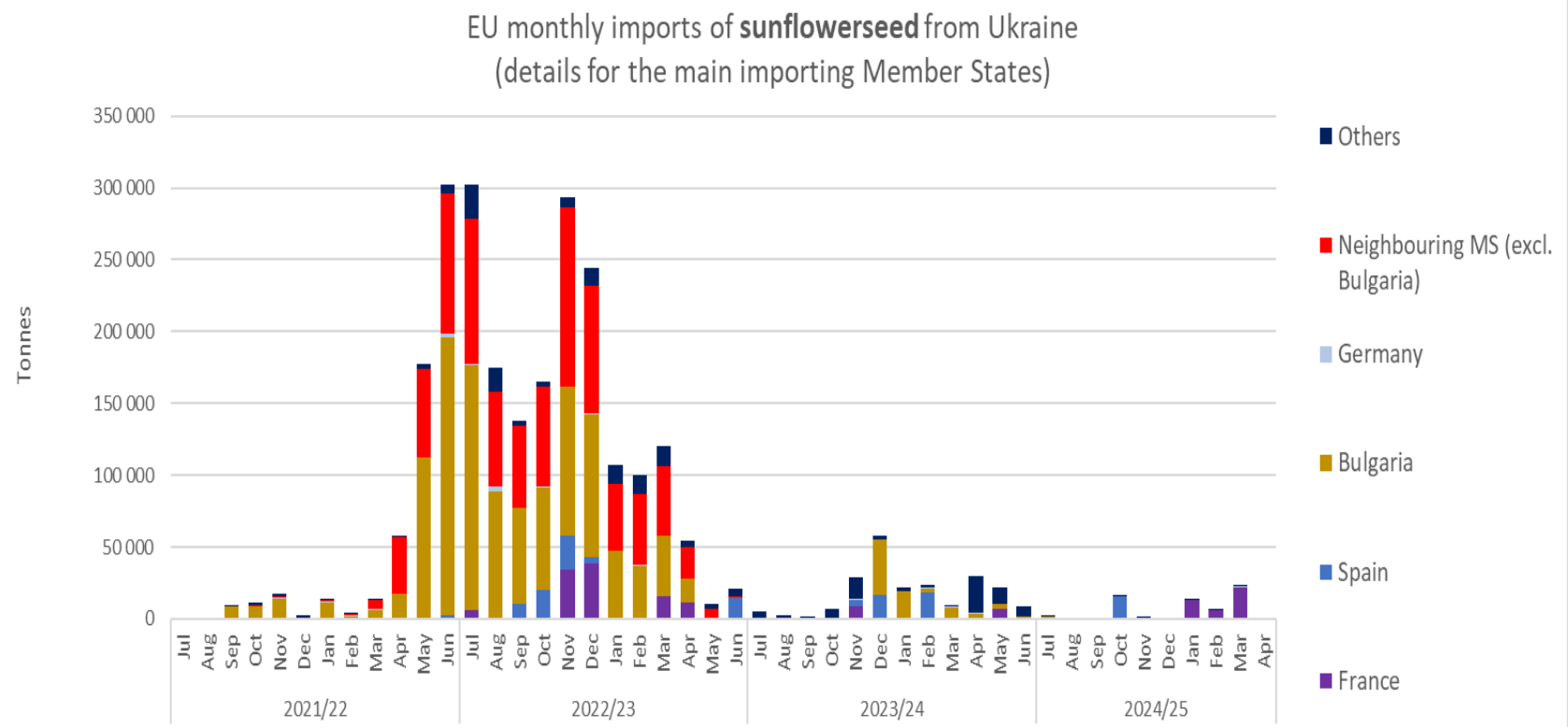
EU imports from Ukraine - rapeseed (in tonnes)

(1/8)

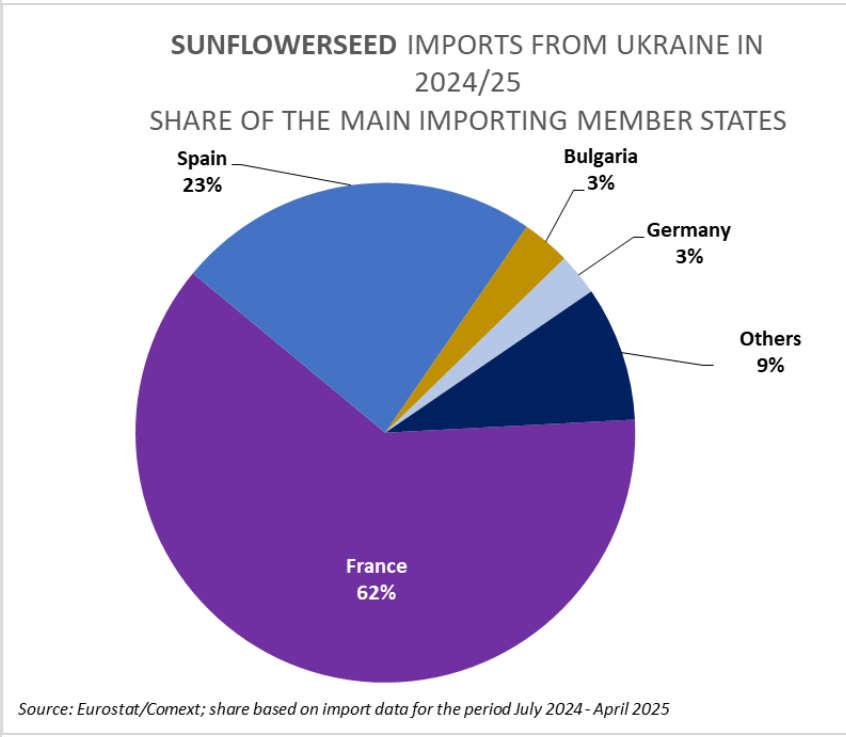


EU imports from Ukraine – sunflower seed (in tonnes)

(2/8)



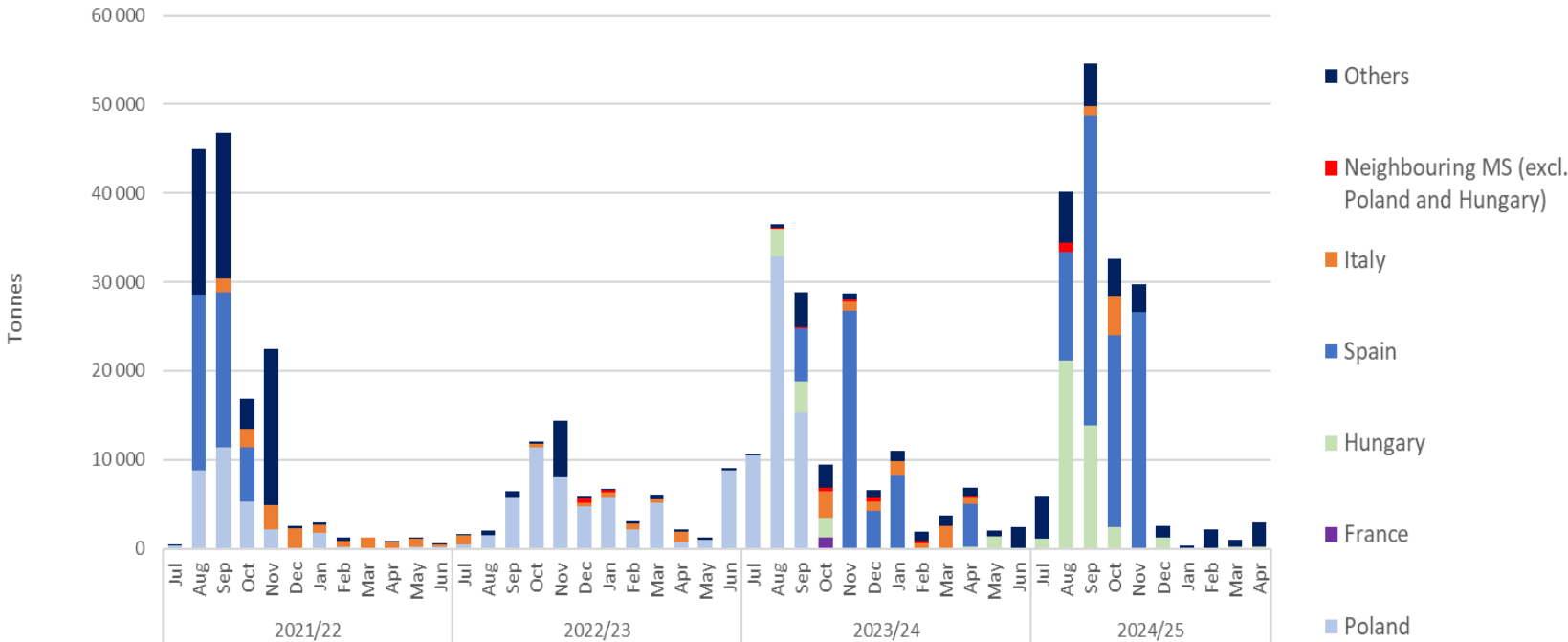
Source: Eurostat/Comext



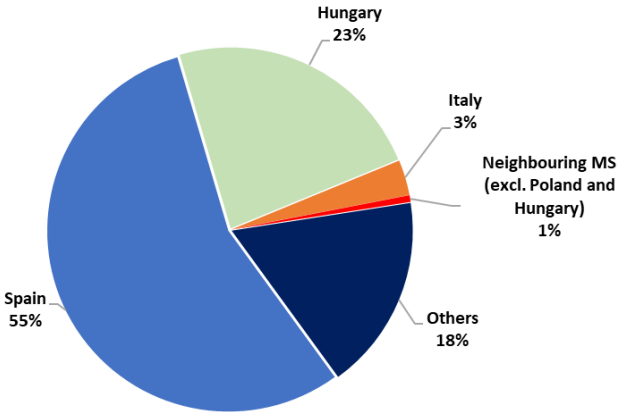
Source: Eurostat/Comext; share based on import data for the period July 2024 - April 2025

EU imports from Ukraine – rapeseed meals (in tonnes) (3/8)

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



RAPESEED MEALS IMPORTS FROM UKRAINE IN 2024/25
SHARE OF THE MAIN IMPORTING MEMBER STATES

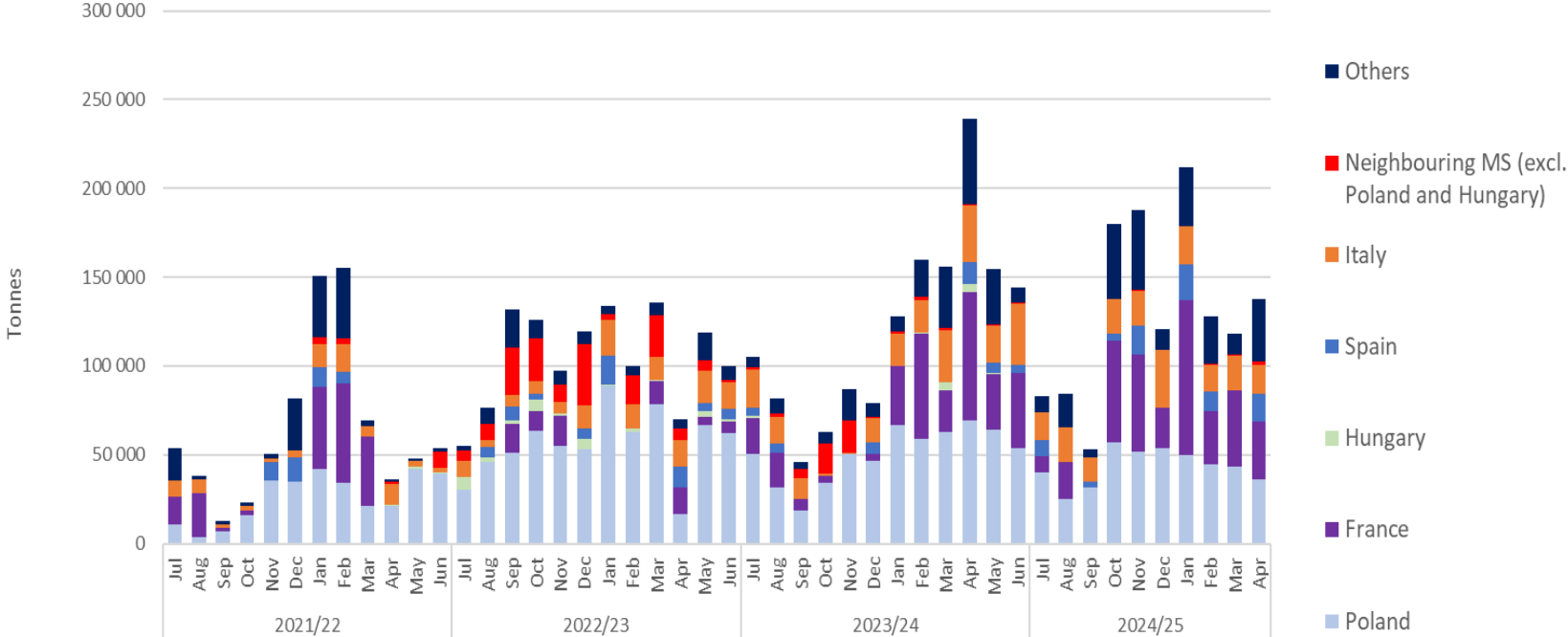


Source: Eurostat/Comext; share based on import data for the period July 2024 - April 2025

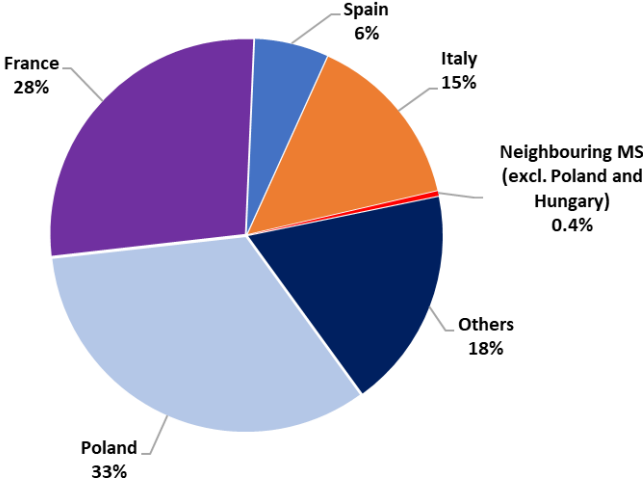
EU imports from Ukraine – sunflower seed meals (in tonnes)

(4/8)

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



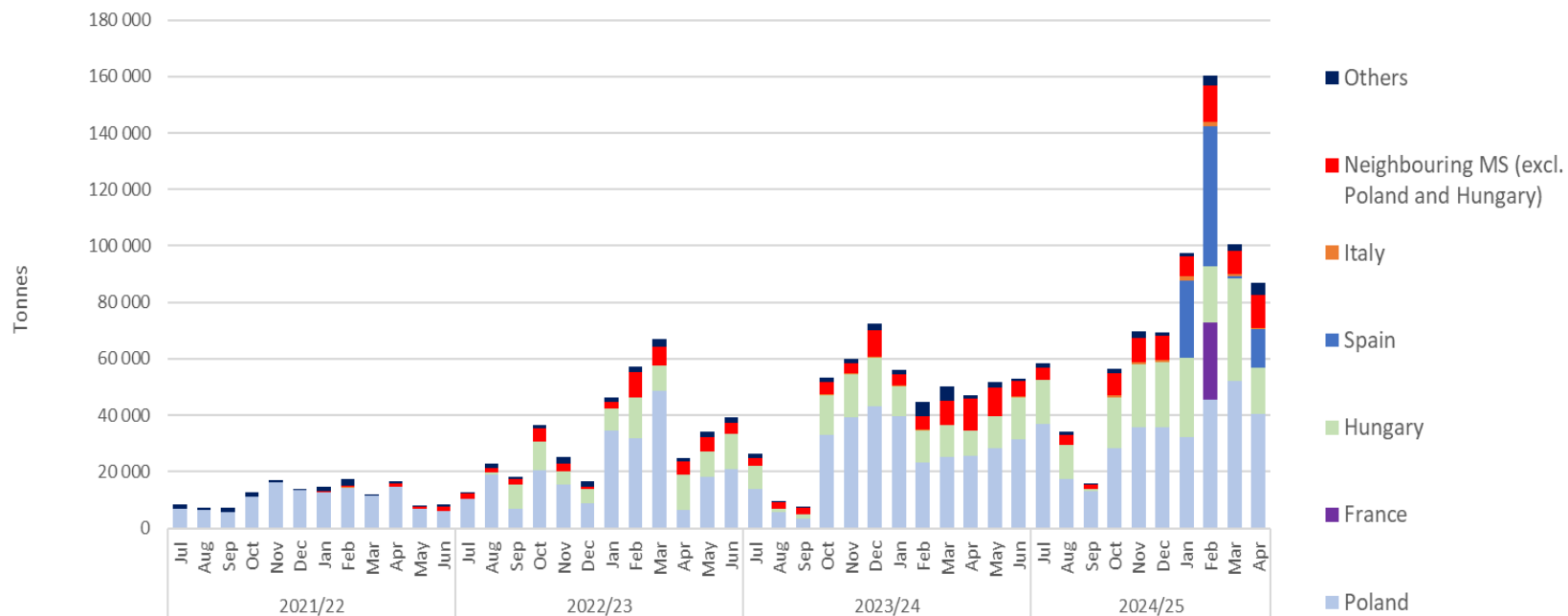
SUNFLOWER SEED MEALS IMPORTS FROM UKRAINE IN 2024/25
SHARE OF THE MAIN IMPORTING MEMBER STATES



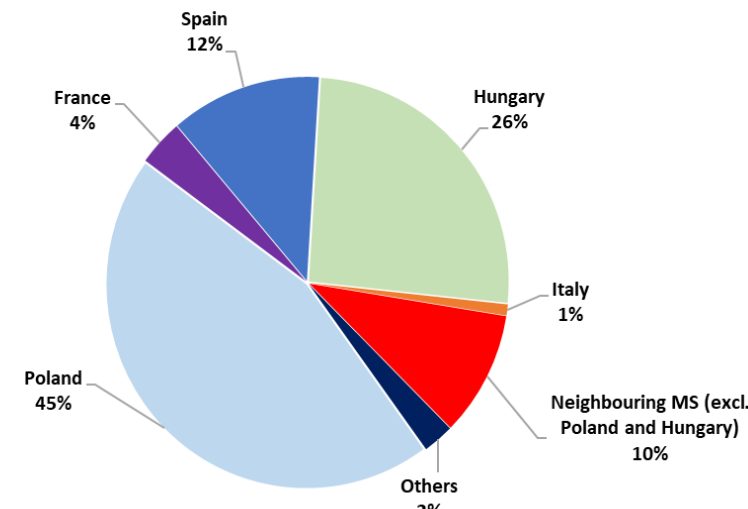
Source: Eurostat/Comext; share based on import data for the period July 2024 - April 2025

EU imports from Ukraine – soya bean meals (in tonnes) (5/8)

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



SOYA BEAN MEALS IMPORTS FROM UKRAINE IN 2024/25
SHARE OF THE MAIN IMPORTING MEMBER STATES

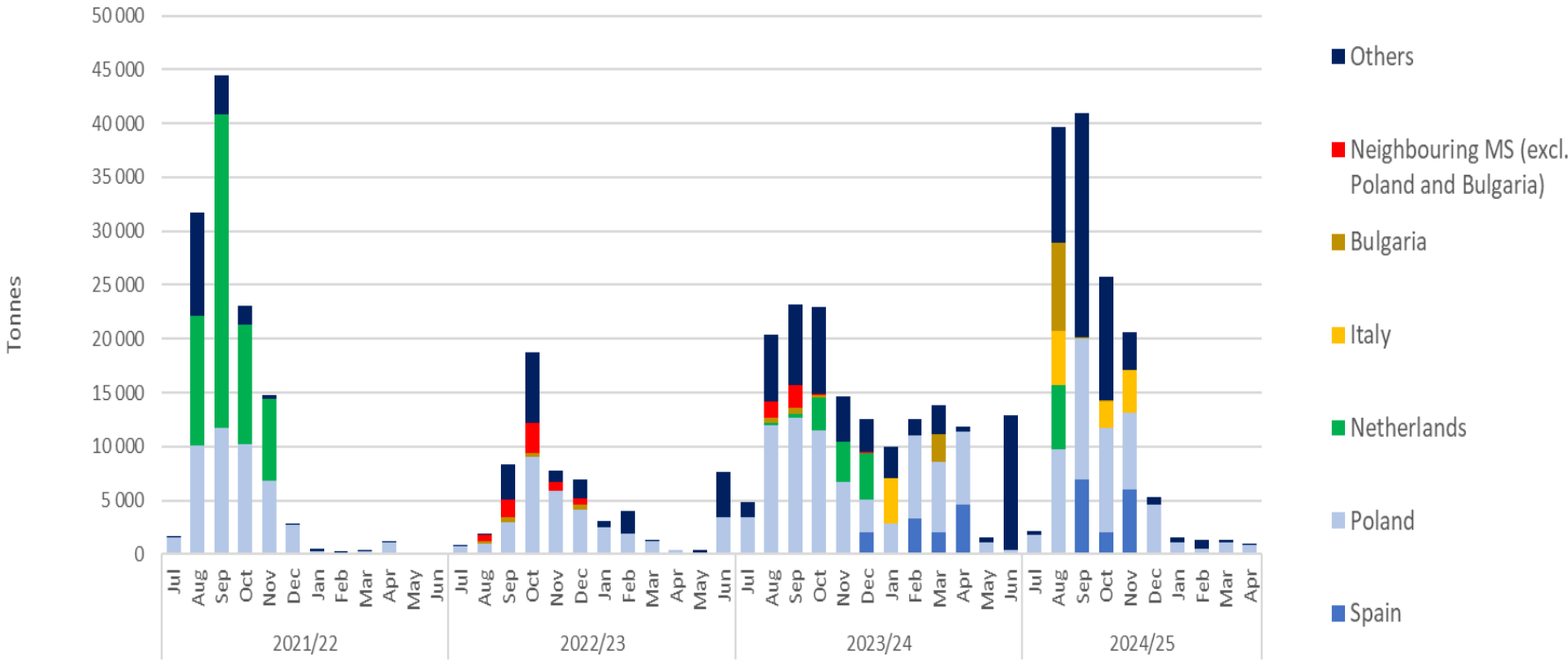


Source: Eurostat/Comext; share based on import data for the period July 2024 - April 2025

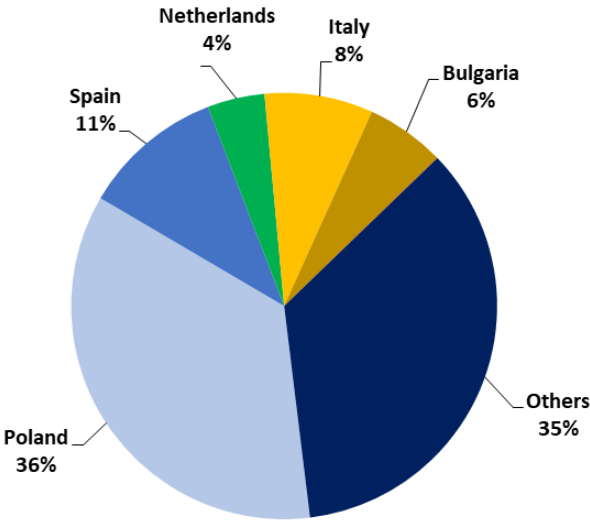
Source: Eurostat/Comext

EU imports from Ukraine – rapeseed oils (in tonnes) (6/8)

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



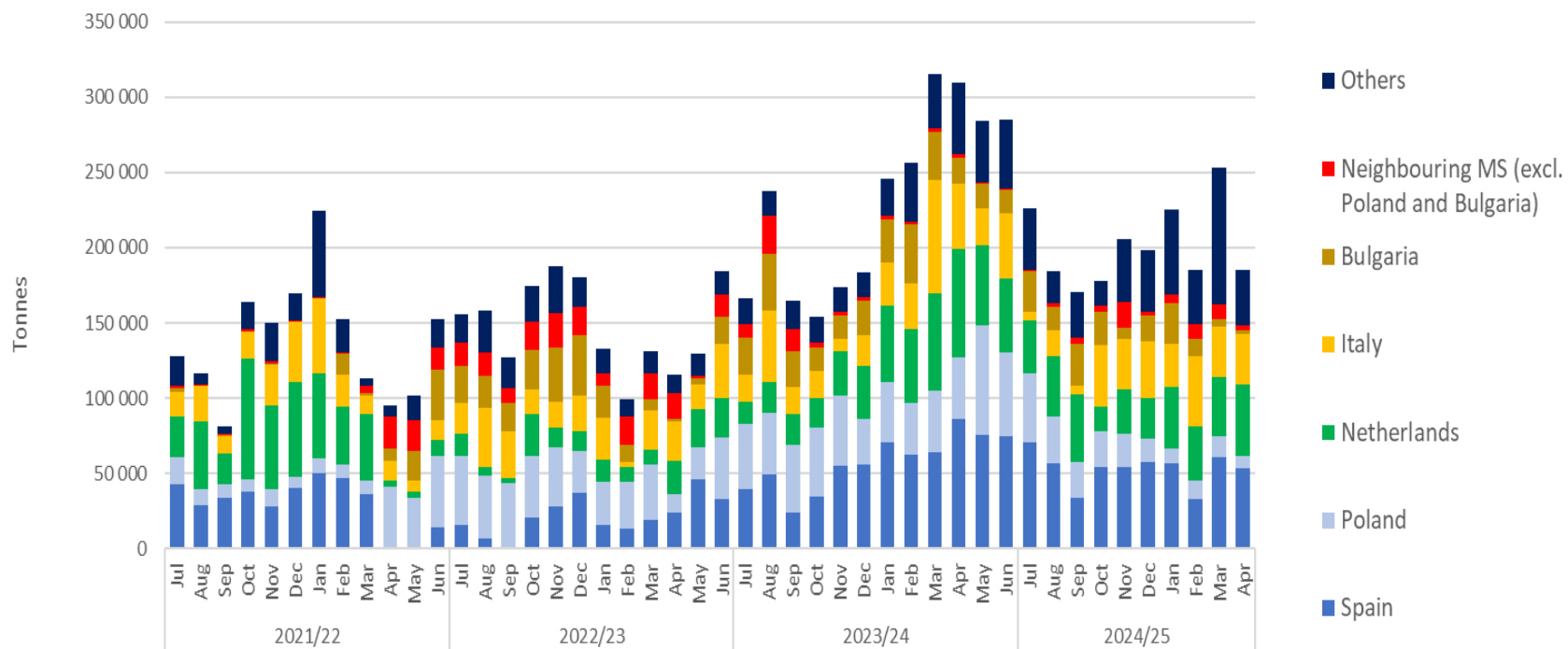
RAPESEED OILS IMPORTS FROM UKRAINE
SHARE OF THE MAIN IMPORTING MEMBER STATES



Source: Eurostat/Comext; share based on import data for the period July 2024 - April 2025

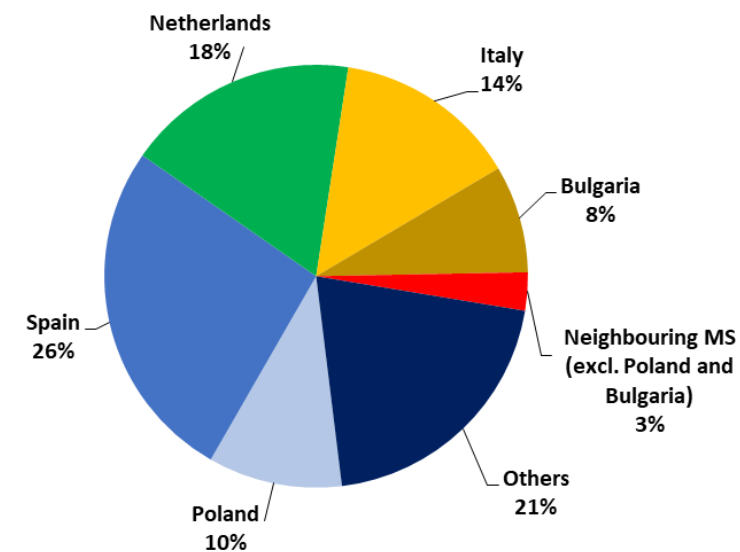
EU imports from Ukraine – sunflower seed oils (in tonnes) (7/8)

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



Source: Eurostat/Comext

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

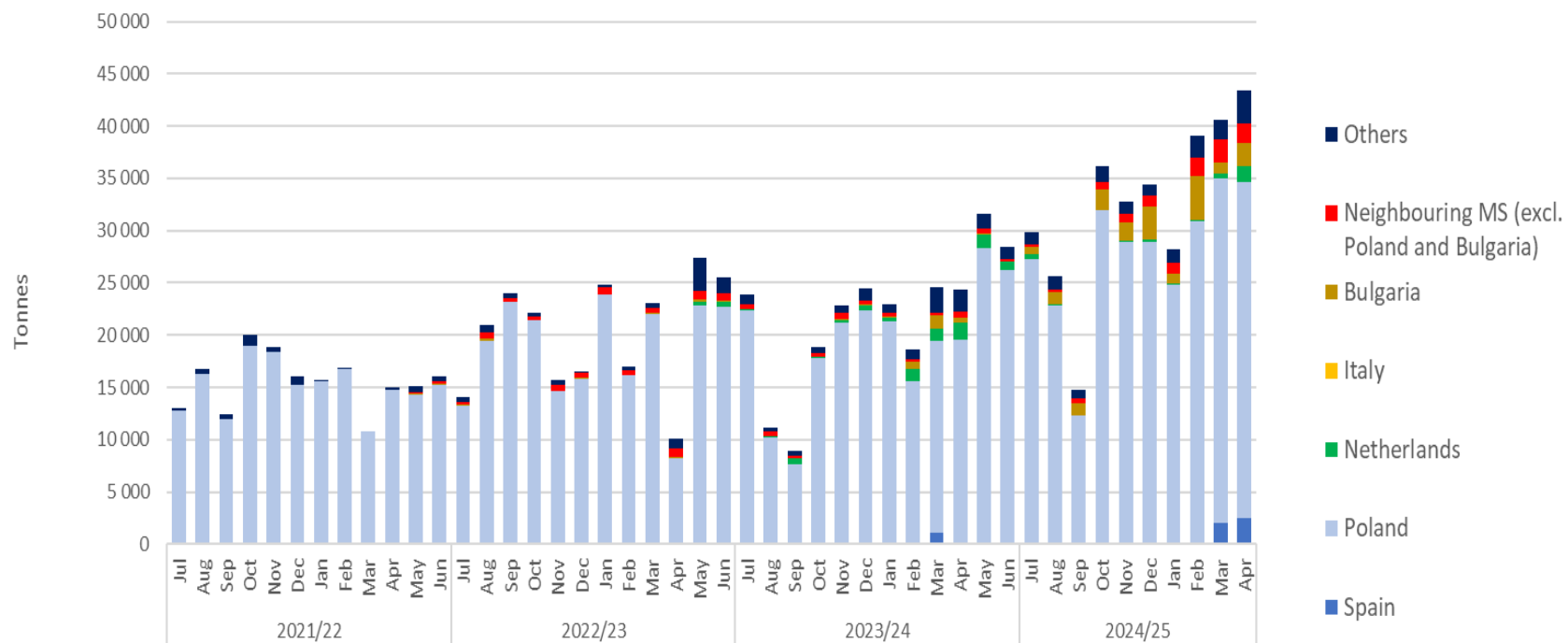


Source: Eurostat/Comext; share based on import data for the period July 2024 - April 2025

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

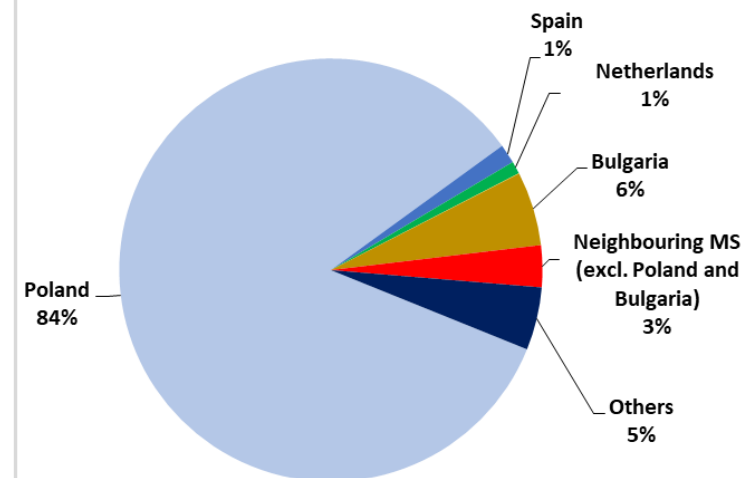
(8/8)

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



Source: Eurostat/Comext

SOYA BEAN OILS IMPORTS FROM UKRAINE
SHARE OF THE MAIN IMPORTING MEMBER STATES



Source: Eurostat/Comext; share based on import data for the period July 2024 - April 2025

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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