Oilseeds and Protein Crops market situation

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

30 October 2026

Table of contents



World Oilseeds & Market News



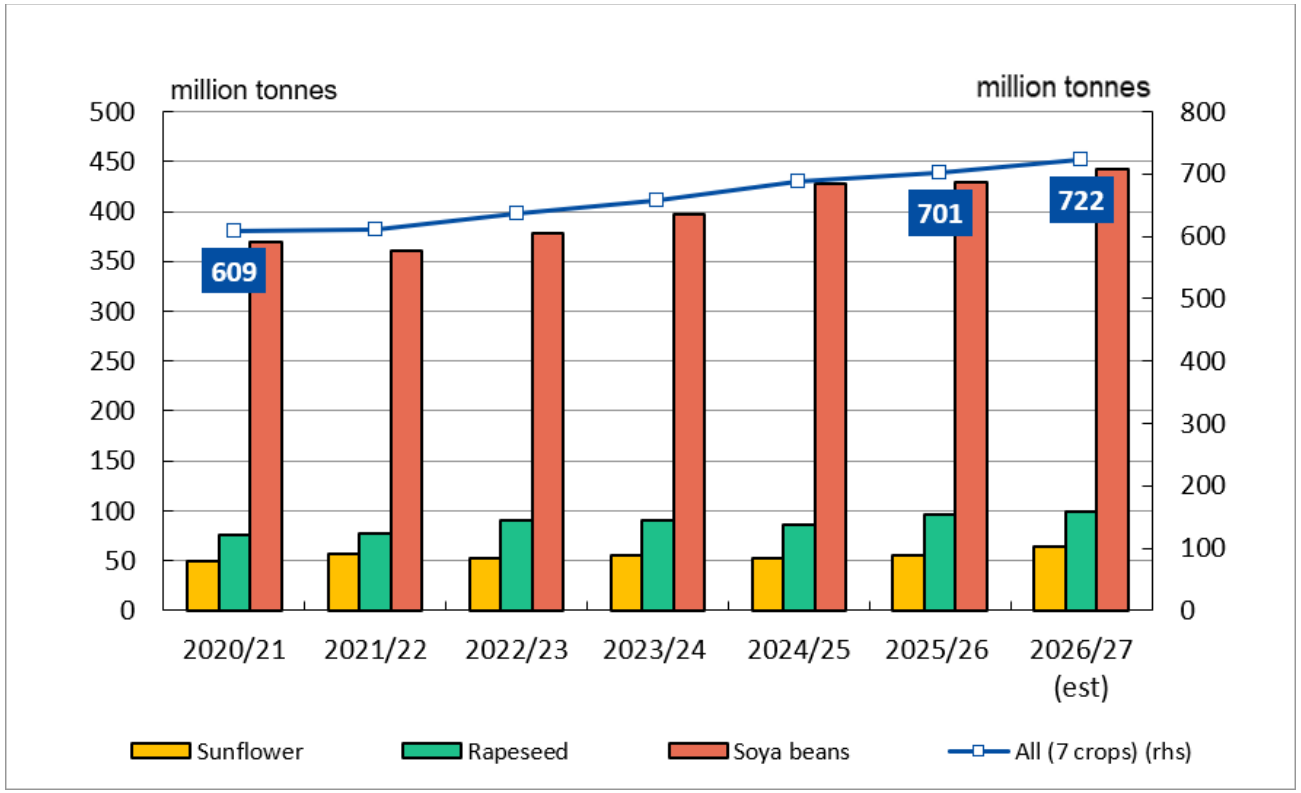
Oilseeds & Protein crops: areas & production (2025/26 & 2026/27)



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

European Commission

2026/27 World Oilseeds (USDA)



Source: USDA-WASDE report

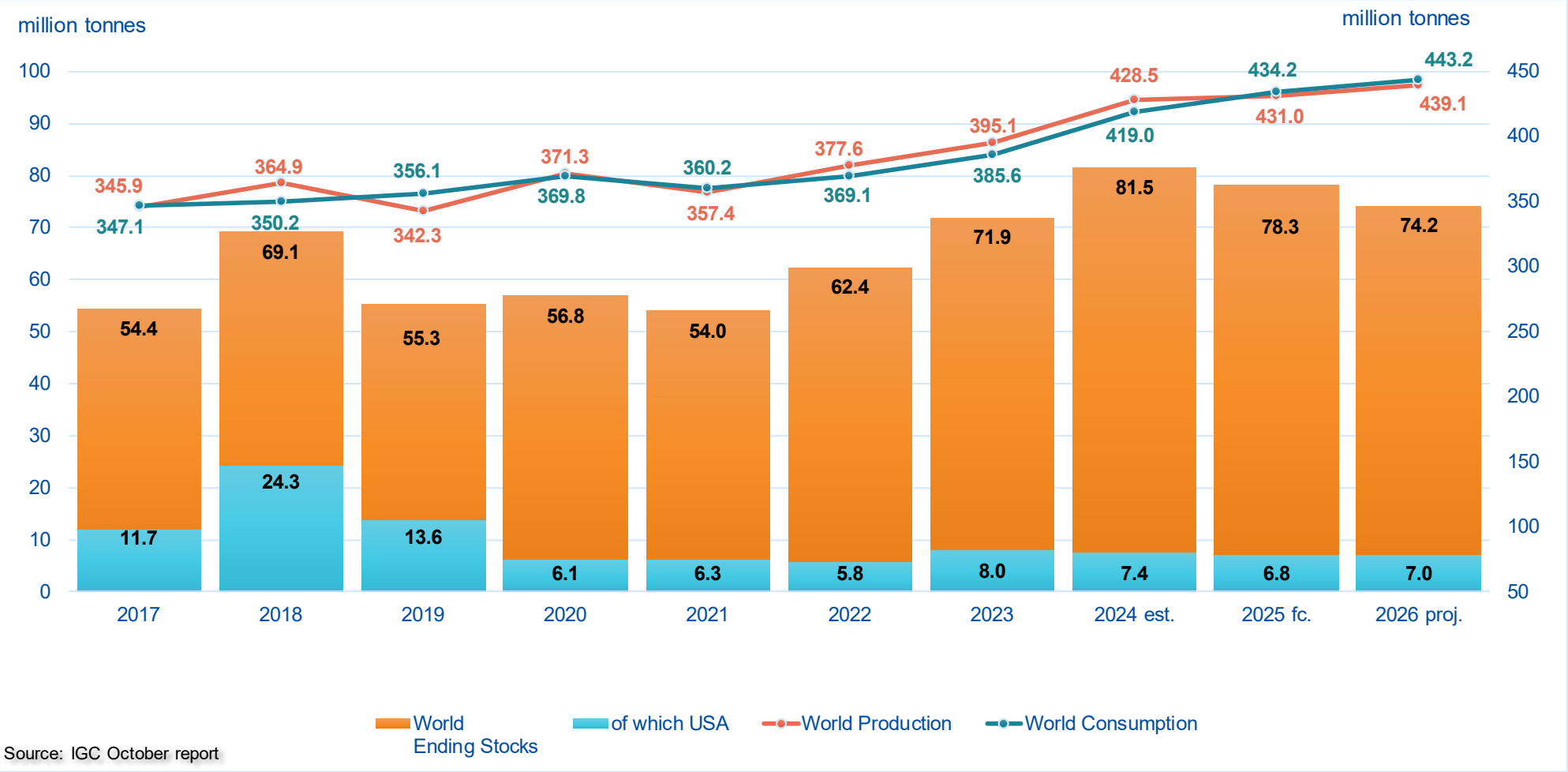
26/27 outlook (changes y/y):

Total Oilseeds: **722 mt** (+3%)

- Soya beans: 443 mt
- Rapeseed: 100 mt
- Sunflower: 64 mt

European Commission

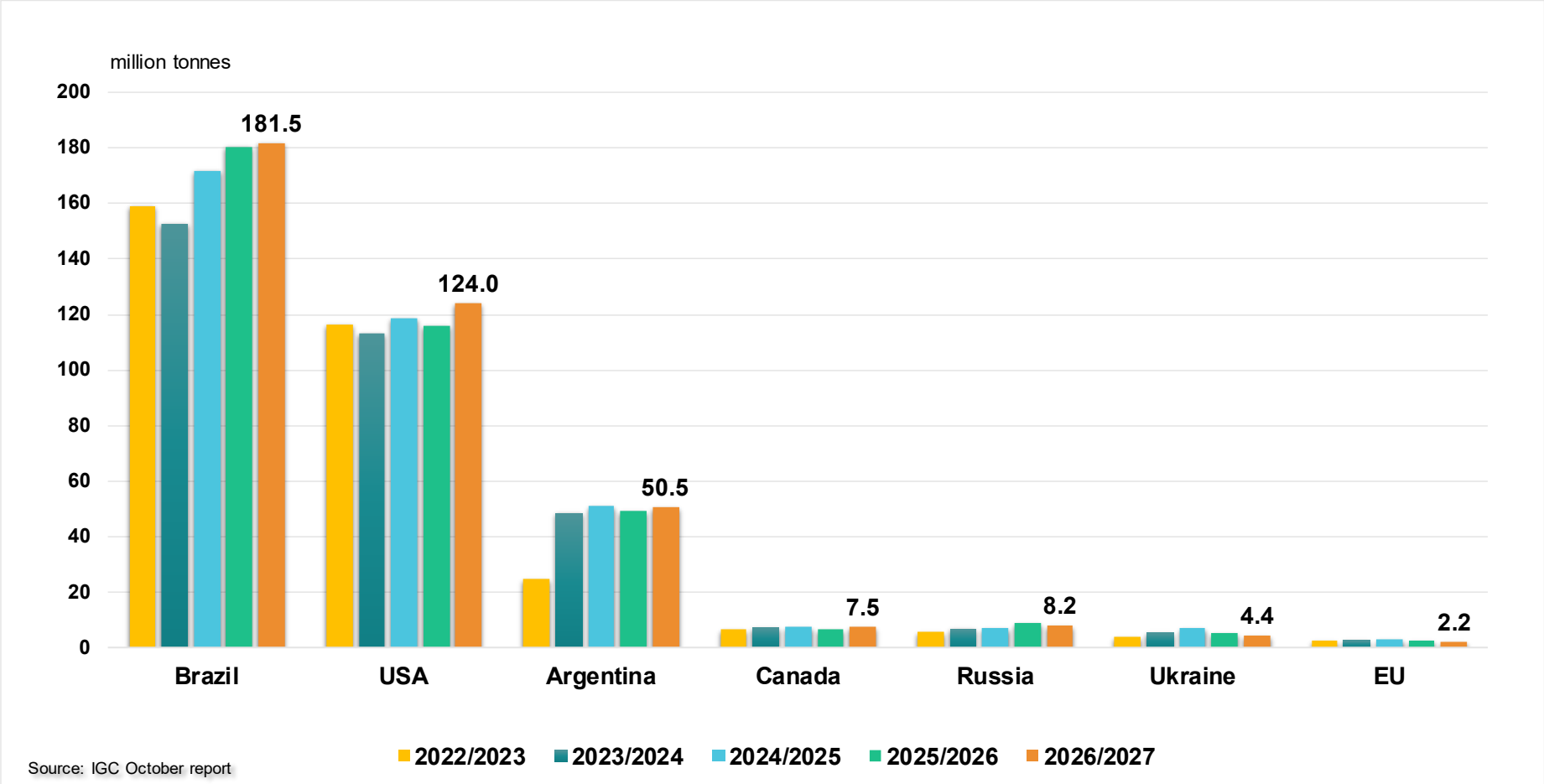
World soya: IGC



Source: IGC October report

European Commission

IGC: soya beans production forecast



Source: IGC October report

European Commission

World Market
Brazil

- **BR** (*IGC citing ANEC*): October **soya bean exports** estimated at 6.2 million tonnes, soya meal at 2.5 million tonnes.
- **BR** *(CONAB):* 2026/27 soya bean **planting** advanced to 43% (35% year ago).
- **BR** *(IGC citing Abiove):* **soya bean** domestic **crush** forecast at a record 66.0 million tones (+3.8% year-on-year), with **exports** at 113.0 million tonnes (-0.8% year-on-year). **Soya oil** production seen at a record 13.3 million tonnes (+3.7% year-on-year).

European Commission

World Market
Argentina

- **ARG** *(USDA):* 2026/27 **soya bean production** is forecast at **50.0 million tonnes** (1% above the previous year), with total **exports** expected at 6.5 million tonnes (28% below the previous year).
- **ARG** *(Ag. Ministry):* 2026/27 **sunflower seed plantings** at 49% (49% previous year).

European Commission

World Market
USA

- **USA** *(USDA-WASDE*): **soya bean production** is revised upwards at 124.2 million tonnes, reflecting a 7% year-on-year increase. Total soya bean **area** is estimated at **34.8 million hectares**.
- **USA** *(USDA weekly export sales*): w/e 15 October, MY 2026/27 **soya beans** cumulative net **sales** (Sep/Aug) estimated at 26.2 million tonnes (+81% year-on-year); soya meal cumulative sales forecast at 5.7 million tonnes (unchanged year-on-year).
- **USA** *(USDA Crop Progress report):* as at 25 October, 2026/27 **soya bean** crop conditions set at 79% good/excellent (77% five-year average); **sunflower seed** at 46% complete (40% five-year average).

European Commission

World Market
Canada

- **Canada** *(AAFC – Outlook for Principal Field Crops/STC):* **2026/27 record canola area,** estimated at 9.5 million hectares (+8% year-on-year). Total **canola output** is expected at 22.1 million tonnes. **Domestic use** remains unchanged at 14.4 million tonnes (up 10% from the previous season).
- **Canada** *(AAFC – Outlook for Principal Field Crops):* **2026/27 canola exports** are forecast at 7.7 million tonnes (down 14% year-on-year).
- **Canada** *(AAFC – Outlook for Principal Field Crops/STC):* **2026/27 soya bean production** is projected at 7.5 million tonnes (up 7% year-on-year).

World Market
Ukraine [1]

- **UKR** *(IGC/UA):* Temporary priority arrangements for the rail transport and export of domestically produced **vegetable oils** via sea and river ports and across state borders.
- **UKR** (*Ag. Ministry*): **Sunflower seed harvest** yielded 9.8 million tonnes (7.8 million tonnes previous year) from 4.4 million hectares (85% of intended area, 4.2 million hectares previous year), **soya beans** at 3.2 million tonnes (3.5 million tonnes previous year) from 1.5 million hectares (91% of intended area, 1.5 million hectares previous year). **Rapeseed planted** on 1.1 million hectares (103% of intended area).

European Commission

World Market
Ukraine [2]

- **UKR** *(TAXUD surveillance data):* week ending 25 October of marketing year 2025/26 (17 weeks) – EU imports of **soya bean** are estimated down at 0.1 million tonnes (4% share of imports); **rapeseed** imports stand at 0.6 million tonnes from 0.7 million tonnes same period previous season (47% share of imports). **Rapeseed oil** imports from Ukraine increased to 0.2 million tonnes (82% share of imports).

Top 5 import origins* - (update of 25/10/2026)

Soyabeans

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Brazil	2 968 309	78.4%	1 947 966	50.2%
United States of America	577 184	15.2%	1 434 952	37.0%
Ukraine	144 522	3.8%	365 615	9.4%
Canada	48 869	1.3%	98 233	2.5%
Uruguay	16 966	0.4%	----------	----------

Rapeseed

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Ukraine	564 761	47.3%	737 672	60.1%
Australia	185 116	15.5%	139 966	11.4%
Canada	126 450	10.6%	0	0.0%
Moldova	119 064	10.0%	234 629	19.1%
United States of America	76 827	6.4%	----------	----------

Sunflowerseed

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Argentina	101 101	42.0%	2 095	1.5%
Serbia	48 676	20.2%	27 711	20.0%
Moldova	48 248	20.1%	82 358	59.6%
China	20 916	8.7%	14 027	10.1%
Ukraine	11 758	4.9%	1 887	1.4%

Soyameal

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Brazil	3 227 541	57.1%	3 792 335	56.8%
Argentina	1 731 554	30.6%	2 108 150	31.6%
United States of America	268 614	4.8%	33 414	0.5%
Ukraine	197 806	3.5%	335 486	5.0%
Paraguay	65 157	1.2%	86 154	1.3%

Rapeseed meal

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Ukraine	87 607	70.3%	46 214	15.2%
United Kingdom	23 582	18.9%	26 896	8.8%
Bosnia and Herzegovina	6 578	5.3%	5 658	1.9%
Belarus	6 444	5.2%	----------	----------

Sunflowerseed meal

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Argentina	398 594	68.8%	394 432	64.2%
Ukraine	98 025	16.9%	159 950	26.1%
Kazakhstan	30 407	5.2%	31 939	5.2%
Serbia	24 983	4.3%	16 758	2.7%

Sunflowerseed oil

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Ukraine	368 062	87.9%	492 825	93.5%
Serbia	32 796	7.8%	13 671	2.6%
Moldova	7 216	1.7%	3 400	0.6%
Türkiye	3 222	0.8%	1 150	0.2%
Congo	1 877	0.4%	----------	----------

Soyaoil

Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Ukraine	79 288	32.8%	172 808	58.6%
Türkiye	43 494	18.0%	17 201	5.8%
Egypt	43 104	17.8%	481	0.2%
Norway	25 787	10.7%	16 529	5.6%
Argentina	24 953	10.3%	66 759	22.6%

Rapeseed oil

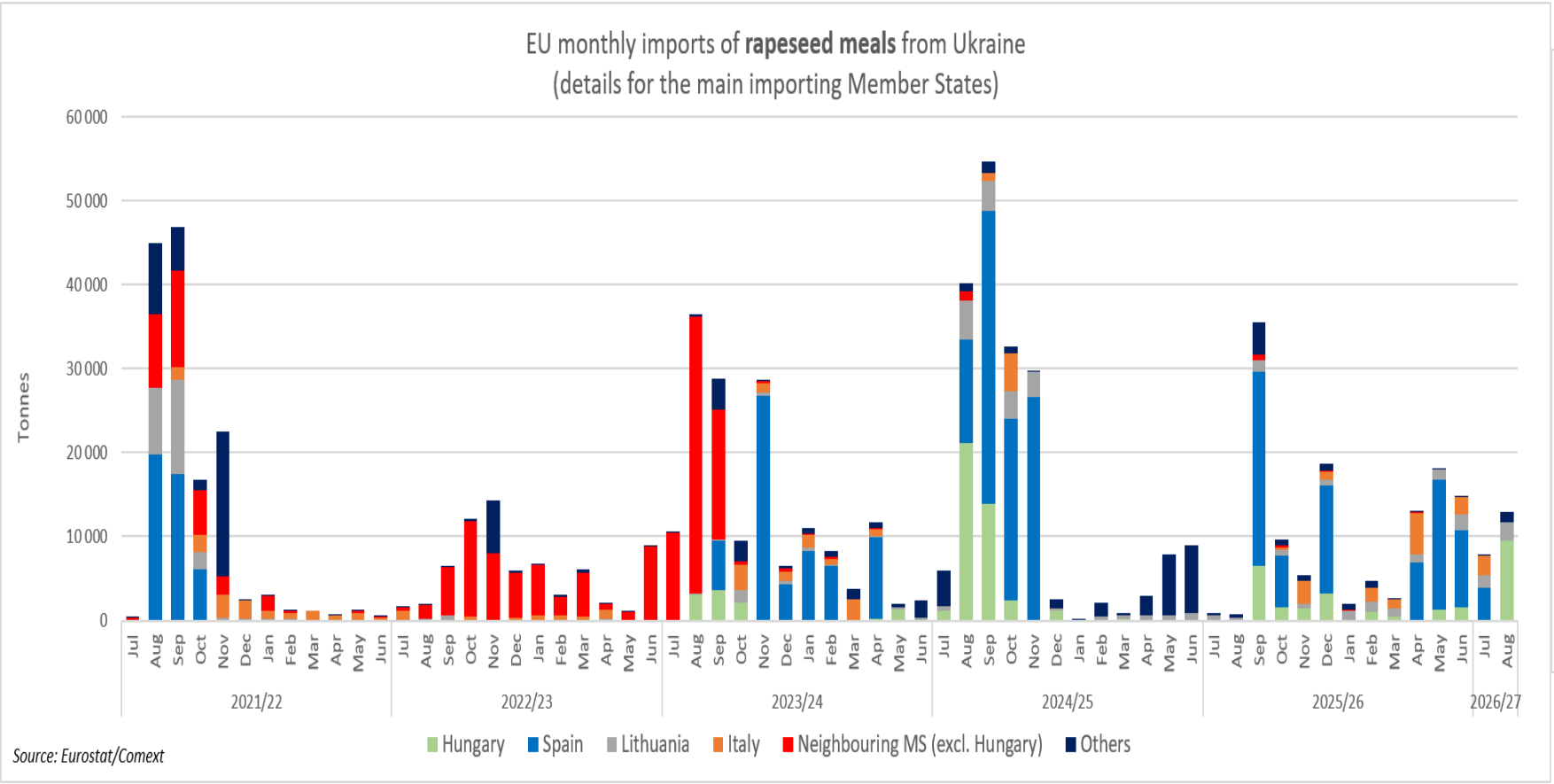
Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Ukraine	182 688	81.9%	126 072	76.2%
United Kingdom	23 413	10.5%	14 809	8.9%
Serbia	6 307	2.8%	6 696	4.0%
Brazil	5 839	2.6%	----------	----------
Norway	3 109	1.4%	90	0.1%

Palm oil

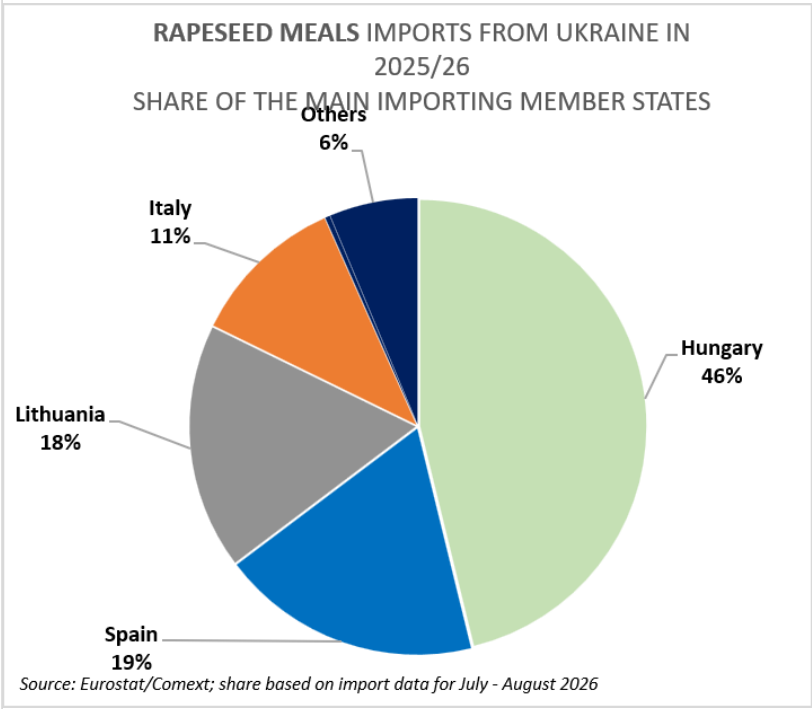
Origin	MY 2026/27 tonnes	MY 2026/27 share	MY 2025/26 tonnes	MY 2025/26 share
Indonesia	264 161	31.2%	326 823	30.7%
Malaysia	208 610	24.7%	289 023	27.2%
Guatemala	154 728	18.3%	150 668	14.2%
Honduras	72 417	8.6%	58 780	5.5%
Papua New Guinea	42 526	5.0%	68 436	6.4%

European Commission

EU imports from Ukraine – rapeseed meals (in tonnes)
Ukraine [3]



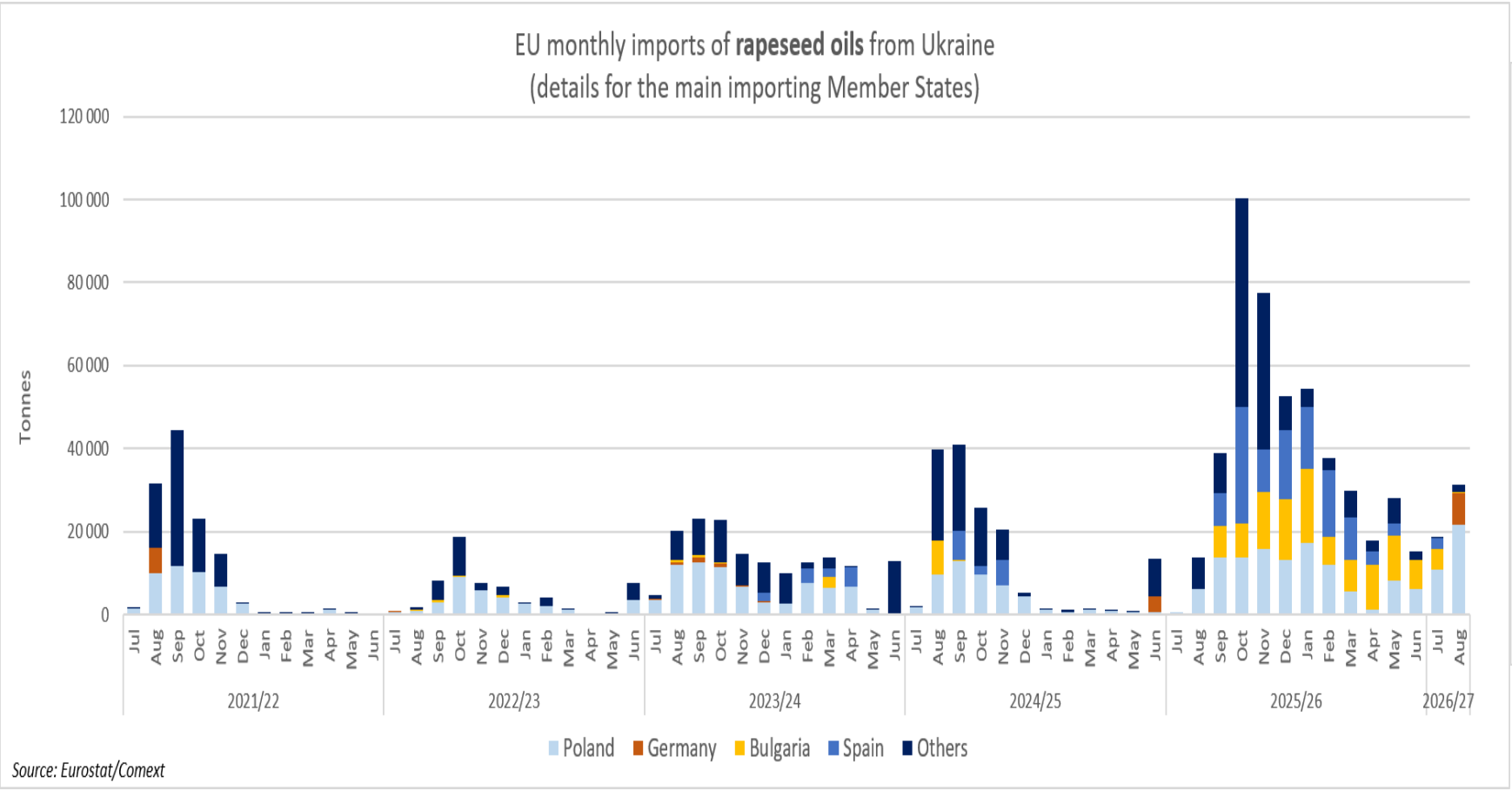
Source: Eurostat/Comext



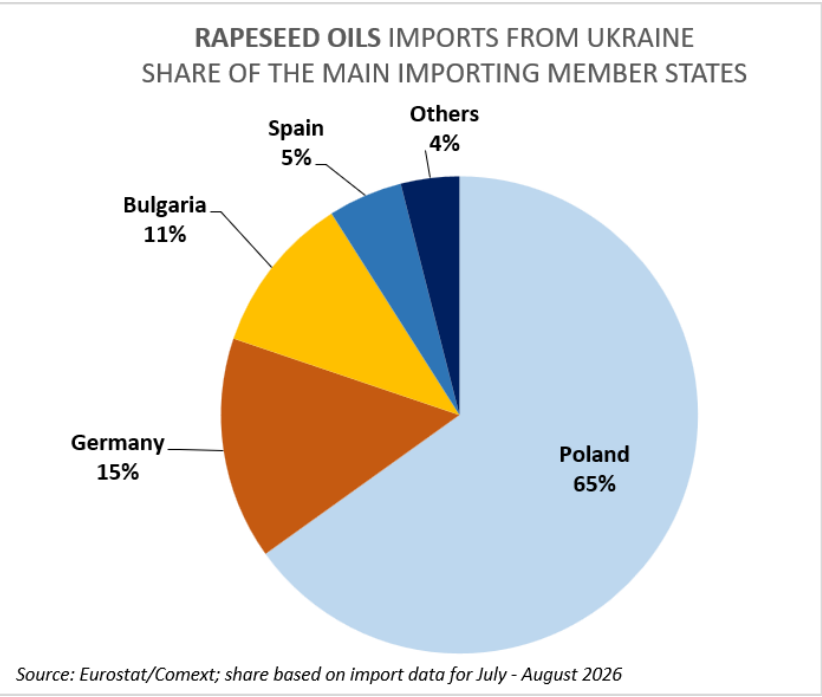
Source: Eurostat/Comext; share based on import data for July - August 2026

European Commission

EU imports from Ukraine – rapeseed oils (in tonnes)
Ukraine [4]



Source: Eurostat/Comext



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

European Commission

Global Market [1]

October – IGC Report. Marketing year 2026/27

- This season, global **soya bean output** is expected to increase by 2% to 439.0 million tonnes, driven by larger harvests in the Americas, which more than offset the year-on-year decline in Ukraine to 4.4 million tonnes. Total **use** is forecast to reach a record level, (up 2% year-on-year), supported by continued demand for soya bean products. In China, consumption is projected to grow by 3% to 138.1 million tonnes. Global **trade** is expected to increase at 190.0 million tonnes (up 2% year-on-year), underpinned by higher shipments to Asia. Soya bean **ending stocks** are forecast to fall for a second consecutive year, declining by 5% to 74.0 million tonnes, mainly as a result of lower stocks among key exporters.

European Commission

Global Market [2]

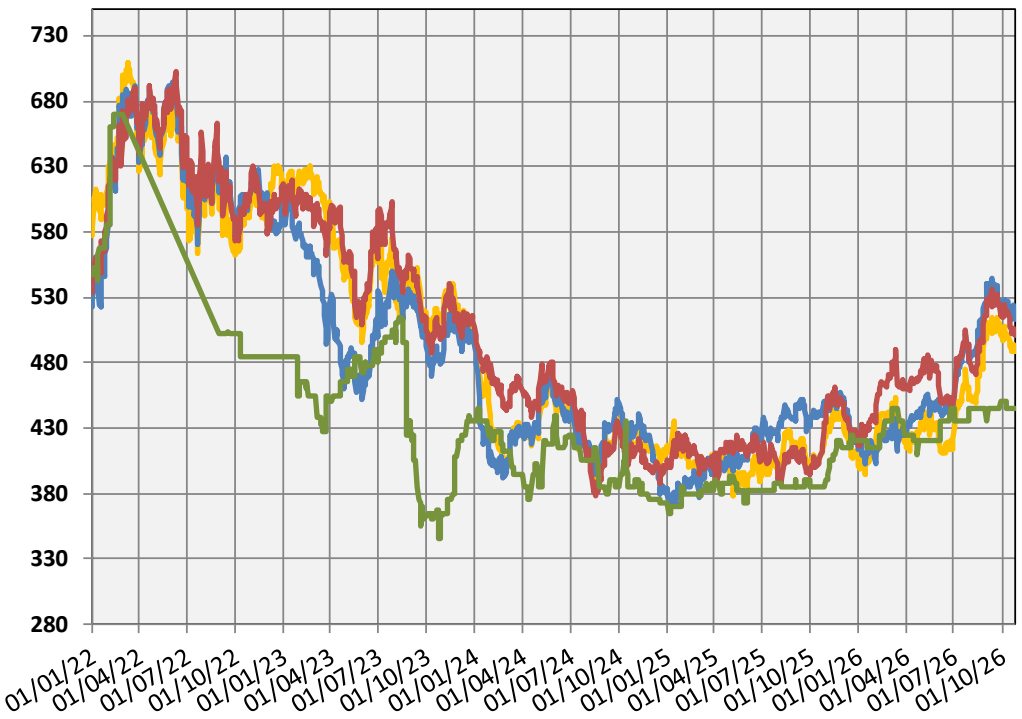
October – IGC Report. Marketing year 2026/27

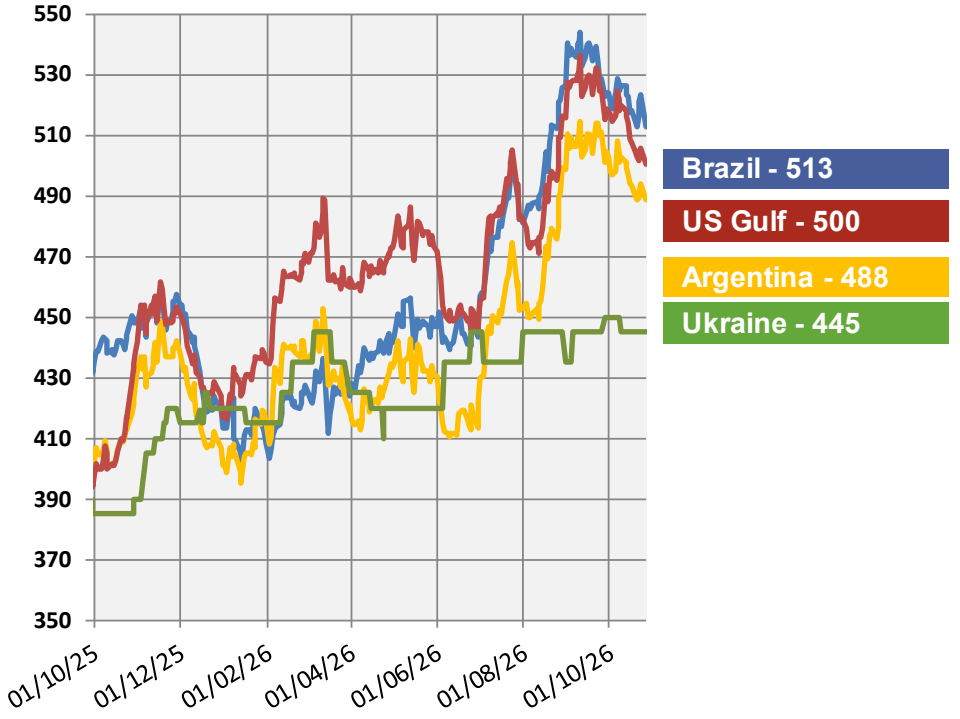
- **Rapeseed/canola production** is projected at 99.4 million tonnes (+4% year-on-year), as a record harvested area more than offsets a slight decline in yields. **Global consumption** is forecast at 99.4 million tonnes, supported by expanding demand from the feed, food and biofuel sectors. **Total stocks** remain unchanged at 9.2 million tonnes, reflecting stock drawdowns in the EU. **Trade** is estimated at 19.2 million tonnes, above recent seasons, with higher shipments to China, which could reach 4.4 million tonnes.

- Boosted by larger Black Sea crops, **sunflower seed production** is estimated at a new peak of 63.2 million tonnes (+12% year-on-year). Total **consumption** is projected to rise to 62.6 million tonnes (+13% year-on-year), shaped by higher processing volumes in the EU and the Black Sea region. **Trade** is expected to decline by 8% year-on-year to 4.5 million tonnes, reflecting lower exports to buyers in the Near East and Asia.

European Commission

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



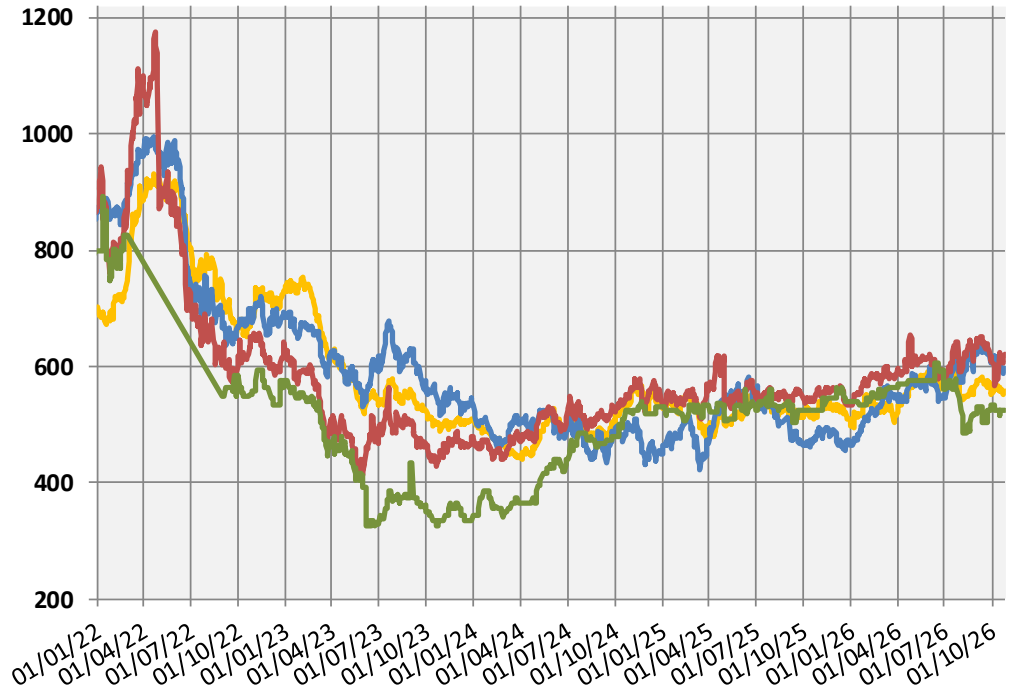


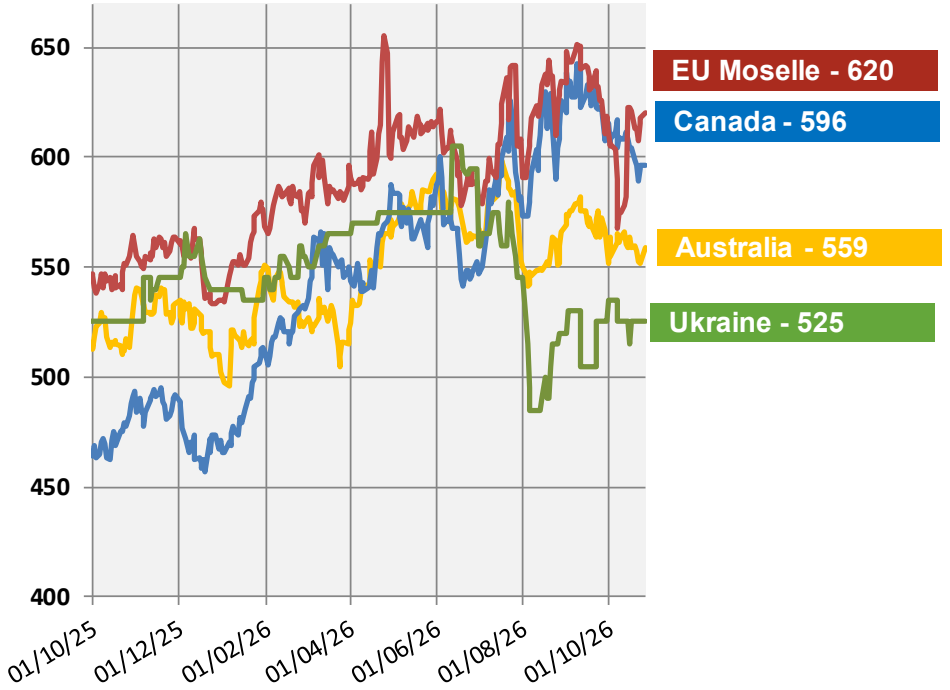
Source: International Grains Council

Latest prices referring to: 26/10/2026

European Commission

World export prices for rapeseed – (USD/tonne)

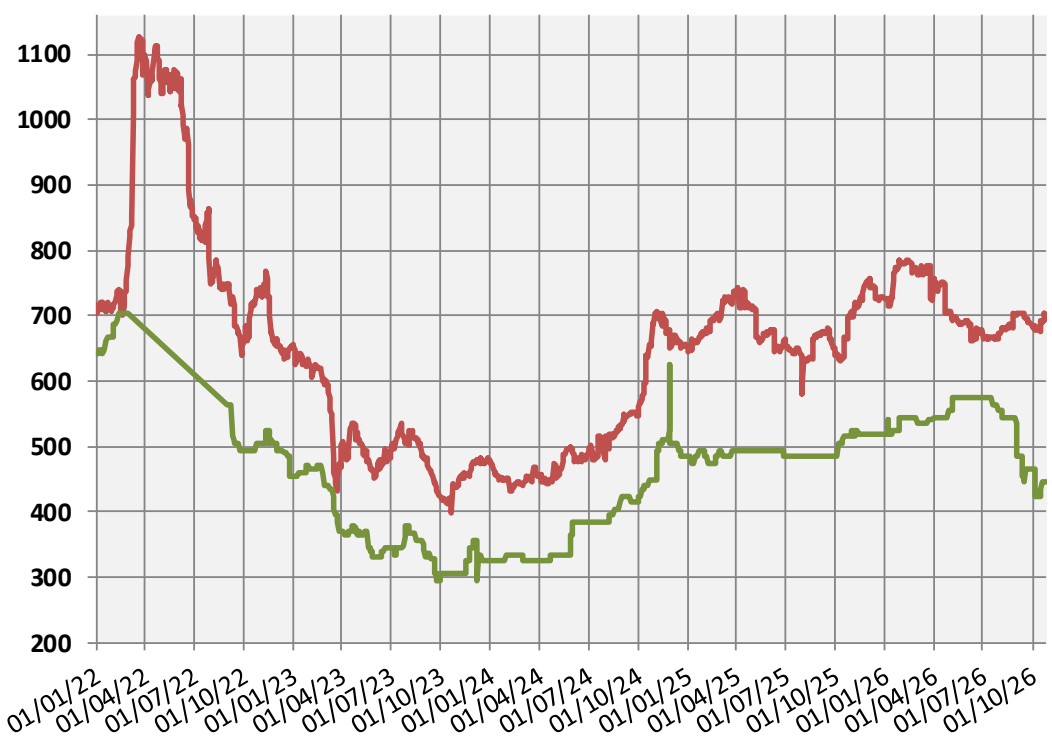


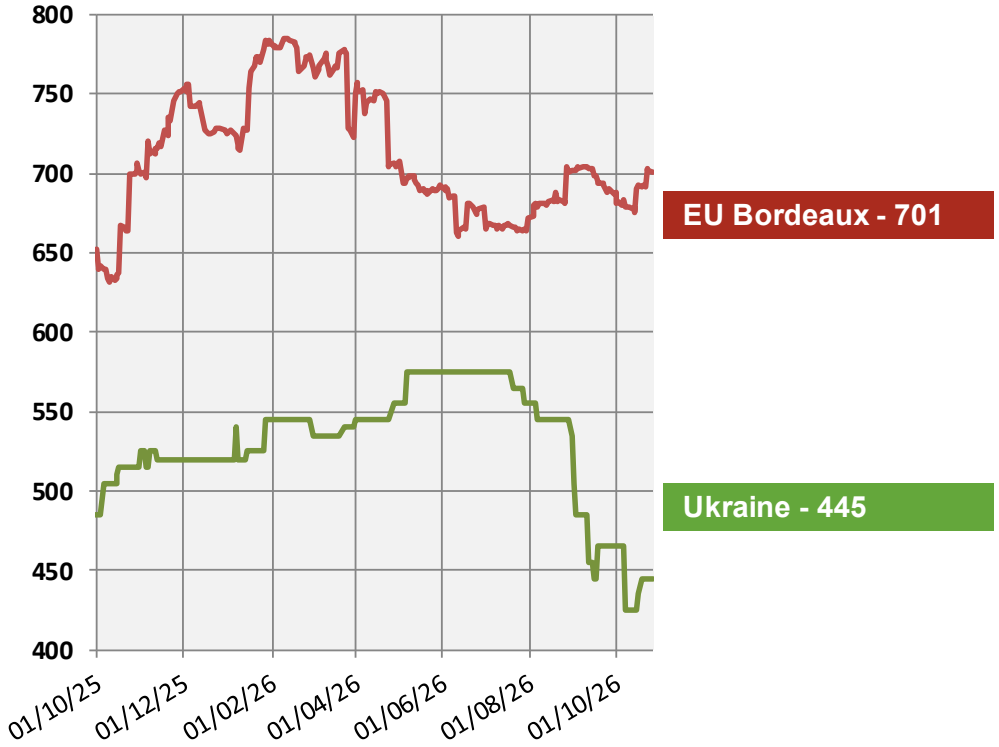


Source: International Grains Council
Latest prices referring to: 26/10/2026

European Commission

World export prices for sunflower – (USD/tonne)





Source: International Grains Council
Latest prices referring to: 26/10/2026

European Commission

Global Oilseed prices: key messages

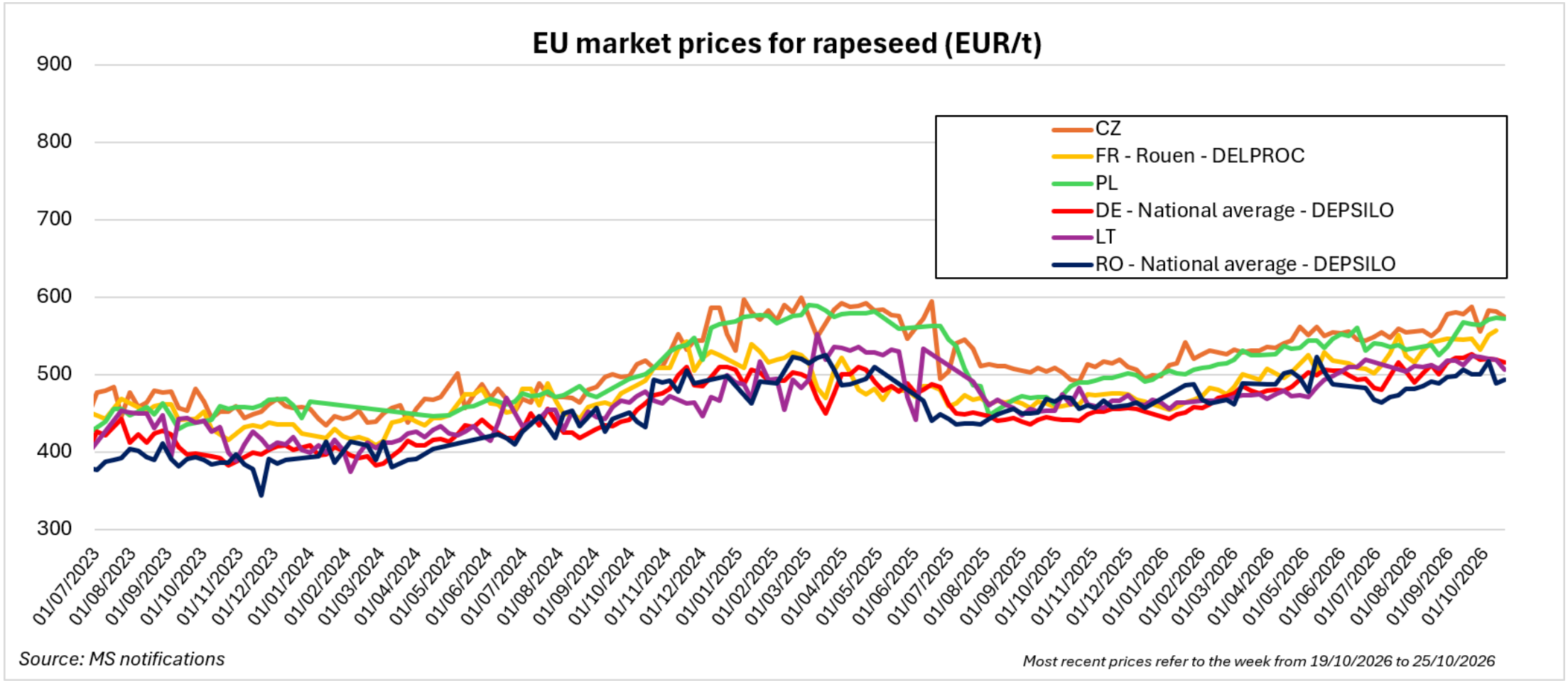
- **Soya bean prices** softened month-on-month across most origins, with Argentina and the US both at -5% m/m, and Brazil at USD 513 per tonne at -3%, driven by improved nearby availability on the world market. Despite the monthly decline, prices remain clearly above last year (+17% in Argentina and the US, +14% in Brazil, and +16% in Ukraine), supported by strong demand from the feed and biofuel sectors.

- **Rapeseed prices** eased month-on-month in most origins, reflecting increased harvest and improved export competition. On a year-on-year basis, rapeseed/canola quotation remains well above 2025 levels in key producing countries: the **EU** at **USD 620 per tonne** (+12% year-on-year), Canada at USD 596 per tonne (+24% year-on-year), and Australia at USD 559 per tonne (+9% year-on-year), supported by high crushing demand and the gains in the crude oil market.

- International **sunflower seed prices** are mixed this month: **EU** prices rose by 2% to **USD 701 per tonne**, supported by firmer domestic market conditions, while Ukrainian quotations fell by 4% owing to harvest pressure and export difficulties. Year-on-year, EU prices remain unchanged, whereas prices in Ukraine are down by 14%, reflecting the impact of lower export volumes.

European Commission

EU prices for rapeseed – (EUR/tonne)

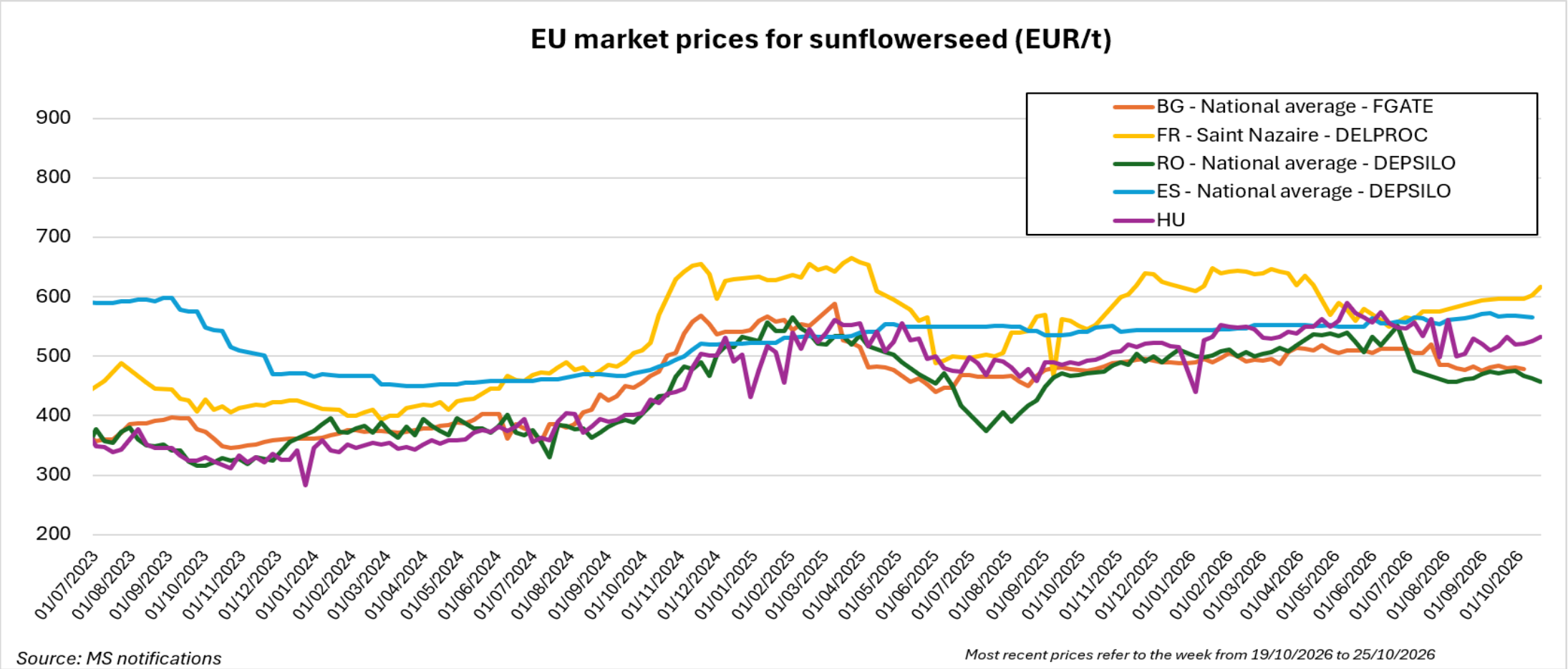


Source: MS notifications

Most recent prices refer to the week from 19/10/2026 to 25/10/2026

European Commission

EU prices for sunflower – (EUR/tonne)



Source: MS notifications

Most recent prices refer to the week from 19/10/2026 to 25/10/2026

European Commission

Table of contents



World Oilseeds & Market News



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



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

European Commission

EU oilseeds 2026/27 forecast

EU OILSEEDS AREA *(million hectares)*

	5-year trimmed average	2025/26	2026/27		
			October	vs. 2025/26 (%)	vs. 5-y AVG (%)
Rapeseed	*5.87*	*6.04*	*6.36*	*5.3*	*8.3*
Sunflower	*4.71*	*4.66*	*4.90*	*5.0*	*3.9*
Soya Beans	*1.03*	*1.01*	*0.96*	*-5.5*	*-7.1*
TOTAL	**11.67**	**11.76**	**12.26**	**4.3**	**5.1**

EU OILSEEDS PRODUCTION *(million tonnes)*

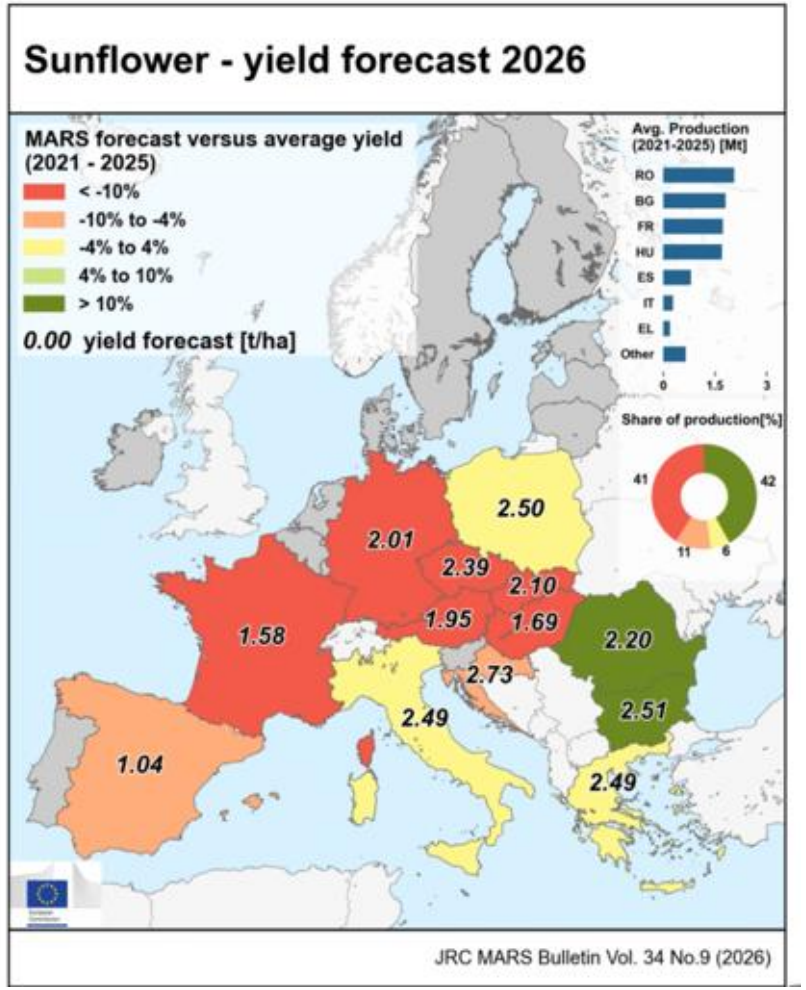
	5-year trimmed average	2025/26	2026/27		
			October	vs. 2025/26 (%)	vs. 5-y AVG (%)
Rapeseed	*18.79*	*20.17*	*19.28*	*-4.4*	*2.6*
Sunflower	*9.19*	*8.47*	*9.60*	*13.3*	*4.5*
Soya Beans	*2.72*	*2.73*	*2.15*	*-21.2*	*-21.0*
TOTAL	**30.71**	**31.44**	**31.11**	**-1.1**	**1.3**

Sources : EC - DG AGRI.

European Commission

EU sunflower seed 2026/27 yield forecast

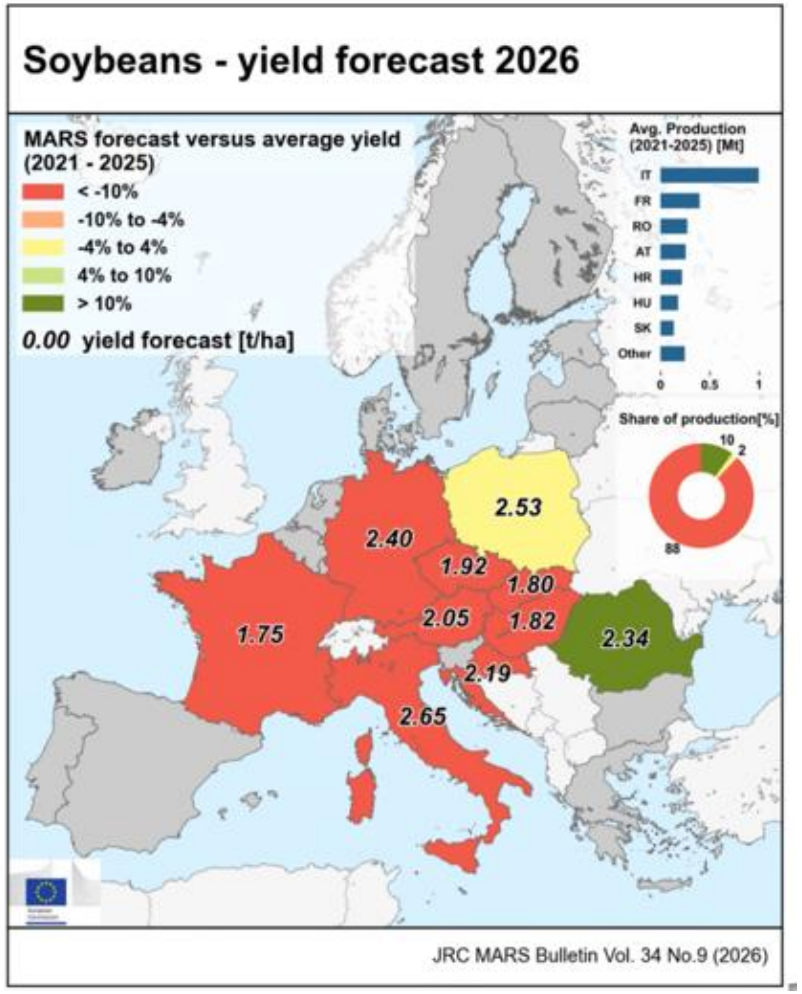
Sunflower						
Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]			
			latest forecast	% diff 5yrs avg	% diff 2025	% diff prev. month
EU	1.98	1.82	**1.93**	- 3	+ 6	- 2
AT	2.68	2.96	**1.95**	- 27	- 34	- 4
BE	—	—	—	—	—	—
BG	2.01	1.66	**2.51**	+ 25	+ 51	+ 5
CY	—	—	—	—	—	—
CZ	2.68	2.85	**2.39**	- 11	- 16	- 4
DE	2.31	2.31	**2.01**	- 13	- 13	± 0
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	2.42	2.08	**2.49**	+ 3	+ 19	± 0
ES	1.09	1.18	**1.04**	- 5	- 12	- 6
FI	—	—	—	—	—	—
FR	2.26	2.06	**1.58**	- 30	- 23	- 4
HR	2.91	2.97	**2.73**	- 6	- 8	± 0
HU	2.52	2.43	**1.69**	- 33	- 30	- 12
IE	—	—	—	—	—	—
IT	2.50	2.66	**2.49**	± 0	- 6	± 0
LT	—	—	—	—	—	—
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.45	2.62	**2.50**	+ 2	- 4	+ 2
PT	—	—	—	—	—	—
RO	1.79	1.50	**2.20**	+ 23	+ 46	± 0
SE	—	—	—	—	—	—
SI	—	—	—	—	—	—
SK	2.59	2.70	**2.10**	- 19	- 22	- 7



European Commission

EU soya bean 2026/27 yield forecast

Soybeans						
			EU yield forecasts for 2026 [t/ha]			
Country	last 5yrs avg yield	2025 yield	latest forecast	% diff 5yrs avg	% diff 2025	% diff prev. month
EU	2.65	2.70	**2.24**	- 15	- 17	- 1
AT	2.92	3.18	**2.05**	- 30	- 35	- 6
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	2.44	2.35	**1.92**	- 21	- 18	- 5
DE	2.89	3.02	**2.40**	- 17	- 21	± 0
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	—	—	—	—	—	—
ES	—	—	—	—	—	—
FI	—	—	—	—	—	—
FR	2.50	2.61	**1.75**	- 30	- 33	± 0
HR	2.47	2.32	**2.19**	- 11	- 6	± 0
HU	2.36	2.14	**1.82**	- 23	- 15	- 4
IE	—	—	—	—	—	—
IT	3.17	3.56	**2.65**	- 17	- 26	± 0
LT	—	—	—	—	—	—
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.52	2.59	**2.53**	+ 1	- 2	± 0
PT	—	—	—	—	—	—
RO	1.97	1.31	**2.34**	+ 19	+ 79	± 0
SE	—	—	—	—	—	—
SI	—	—	—	—	—	—
SK	2.17	2.21	**1.80**	- 17	- 19	± 0



European Commission

EU protein crops 2026/27 forecast

EU PROTEIN CROPS AREA *(million hectares)*

	5-year trimmed average	2025/26	2026/27		
			October	vs. 2025/26 (%)	vs. 5-y AVG (%)
Field peas	*0.96*	*1.03*	*1.04*	*1.2*	*7.8*
Broad beans	*0.48*	*0.53*	*0.59*	*11.6*	*22.1*
Sweet lupins	*0.25*	*0.27*	*0.28*	*3.3*	*12.8*
TOTAL	**1.70**	**1.83**	**1.91**	**4.6**	**12.6**

EU PROTEIN CROPS PRODUCTION *(million tonnes)*

	5-year trimmed average	2025/26	2026/27		
			October	vs. 2025/26 (%)	vs. 5-y AVG (%)
Field peas	*2.12*	*2.43*	*2.43*	*0.00*	*14.80*
Broad beans	*1.29*	*1.49*	*1.63*	*9.30*	*26.60*
Sweet lupins	*0.43*	*0.51*	*0.51*	*0.10*	*18.10*
TOTAL	**3.84**	**4.43**	**4.57**	**3.1**	**19.1**

Sources : EC - DG AGRI.

European Commission

EU oilseeds and protein crops 2026/27 forecast

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	**6 359**	12	190	307	188	1 132	82	19	4	77	1 422	28	21	0	129	312	2	155	2	21	1 006	0	918	2	140	68	122
	Yield	**3.03**	3.37	3.20	2.62	3.99	3.10	2.50	4.66	1.21	2.47	3.33	3.06	2.97		2.47	2.34	3.46	2.65	3.65	2.68	2.99		2.97	1.96	3.29	1.37	3.13
	Production	**19 282**	39	608	805	751	3 508	206	88	5	189	4 736	87	63	0	319	728	8	410	9	55	3 004	0	2 727	4	459	94	381
Sunflower	Area	**4 896**	0	950	33	0	101	0	0	72	711	771	80	110	0	0	0	0	784	1	32	25	2	1 138	1	84	0	0
	Yield	**1.96**		2.39	2.49		2.27			2.49	1.10	1.58	3.04	2.49				2.72	1.91	0.00	2.04	2.46	2.25	2.20	1.64	2.25		
	Production	**9 602**	0	2 271	82	0	229	0	0	180	783	1 216	243	275	0	0	0	1	1 497	0	65	62	5	2 504	1	189	0	0
Soja	Area	**959**	0	1	34	0	52	0	0	2	3	156	78	302	0	0	2	0	50	0	85	40	0	100	4	51	0	0
	Yield	**2.25**		0.98	2.01		2.56			0.41	3.27	1.80	1.81	2.65			1.58	0.00	1.89	0.00	2.19	2.53		2.34	1.88	1.80		
	Production	**2 152**	0	0	69	0	134	0	0	1	9	281	141	800	0	0	2	0	94	0	185	102	0	235	8	91	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	1	2
	Yield	**1.55**	0.00	1.34	1.17		1.79	1.38	0.00	2.17	0.77	1.68				1.23	0.65		1.37		1.14	1.55		1.50		0.90	0.87	1.49
	Production	**69**	0	2	2	0	8	0	0	0	1	44	0	0	0	0	1	0	3	0	2	1	0	2	0	0	1	2
Total oilseeds	Area	**12 259**	12	1 142	376	188	1 289	83	19	78	792	2 375	186	434	0	130	314	3	990	3	139	1 072	2	2 158	7	275	69	123
	Yield	**2.54**	3.35	2.52	2.55	3.99	3.01	2.50	4.65	2.37	1.24	2.64	2.53	2.63		2.46	2.33	3.31	2.02	2.65	2.22	2.96	2.25	2.53	1.89	2.69	1.37	3.11
	Production	**31 106**	39	2 881	957	751	3 878	206	88	186	981	6 277	471	1 138	0	319	731	9	2 004	9	307	3 170	5	5 468	13	739	94	383
Field peas	Area	**1 039**	1	18	44	13	145	50	1	19	195	150	1	12	0	45	79	0	29	1	6	33	14	89	0	16	51	27
	Yield	**2.34**	3.55	2.19	2.20	3.76	3.13	2.21	5.73	1.51	1.28	3.15	1.81	2.67	1.65	2.34	2.32	3.47	2.36	0.00	2.23	2.15	1.25	1.82	1.75	2.30	2.80	3.40
	Production	**2 435**	3	39	98	48	455	110	7	29	249	471	1	32	0	105	184	0	68	0	13	72	18	161	1	36	142	93
Broad beans	Area	**590**	1	0	2	22	69	16	17	4	32	120	7	52	0	50	113	0	0	3	5	40	3	10	0	0	9	16
	Yield	**2.76**	4.38		2.14	4.03	3.53	2.21	5.08	3.05	1.20	2.23	2.03	1.96	2.15	3.32	3.08	2.60	1.19	3.05	2.46	2.69	0.91	1.22			2.46	3.41
	Production	**1 628**	5	0	5	89	244	35	85	13	38	267	15	102	0	165	347	0	1	10	13	107	2	12	0	0	22	54
Lupins	Area	**280**	0	0	1	1	26	0	0	15	3	4	0	1	0	0	5	0	0	0	1	217	7	0	0	0	0	0
	Yield	**1.82**		0.00	1.21	2.19	1.55			1.06	0.83	2.12		1.50		0.72	1.17	2.50	1.68		1.54	1.96	0.80	0.75		1.21		
	Production	**510**	0	0	1	1	40	0	0	16	2	9	0	2	0	0	6	0	0	0	1	426	5	0	0	0	0	0
Total protein crops	Area	**1 909**	2	18	47	35	240	65	18	38	229	274	8	65	0	94	197	0	29	5	12	290	24	99	0	16	59	43
	Yield	**2.39**	4.05	2.19	2.18	3.90	3.08	2.21	5.13	1.50	1.26	2.73	2.01	2.08	2.07	2.85	2.72	3.13	2.34	2.11	2.29	2.08	1.09	1.76	1.75	2.29	2.75	3.40
	Production	**4 572**	8	39	103	138	738	144	92	58	290	747	16	136	0	270	537	1	69	10	27	604	26	174	1	36	164	146
Oilseeds and protein crops	Area	**14 168**	14	1 160	423	223	1 529	148	37	117	1 021	2 649	194	499	0	224	511	3	1 020	8	150	1 362	26	2 257	7	290	128	166
	Yield	**2.52**	3.45	2.52	2.51	3.98	3.02	2.37	4.88	2.09	1.24	2.65	2.51	2.55	2.07	2.63	2.48	3.30	2.03	2.33	2.22	2.77	1.19	2.50	1.88	2.67	2.01	3.18
	Production	**35 678**	47	2 920	1 061	889	4 616	351	180	244	1 271	7 024	487	1 275	0	589	1 268	10	2 073	18	334	3 774	31	5 642	14	776	258	529

European Commission

EU Oilseeds 2026/27: key messages

EU Oilseeds 2026/27

- This month, the **EU oilseed area** is revised slightly downwards to **12.3 million hectares**, reflecting lower sunflower and soya bean plantings in France. The EU **soya bean area** is now estimated at 0.96 million hectares, 7% below the five-year average.
- Total **EU oilseed production** is trimmed at **31.1 million tonnes**, mainly due to lower rapeseed production in Poland and reduced sunflower seed and soya bean output in France. **EU soya bean** output is now forecast at 2.2 million tonnes, representing 21% decline compared with the five-year average due to unfavourable weather conditions.

European Commission

EU Protein Crops 2026/27: key messages

EU Protein Crops 2026/27

- In October, the **area** planted with **protein crops** in the EU remains broadly stable at 1.9 million hectares, with field peas projected at 1.0 million hectares (8% above the five-year average).
- Total EU **protein crop production** is forecast at 4.6 million tonnes (19% above the five-year average), mainly due to an upward revision in field pea production in France and Finland, which largely offsets the decline in broad bean production in France.

European Commission

Table of contents



World Oilseeds & Market News



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



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

European Commission

Oilseeds balance sheet (EU)

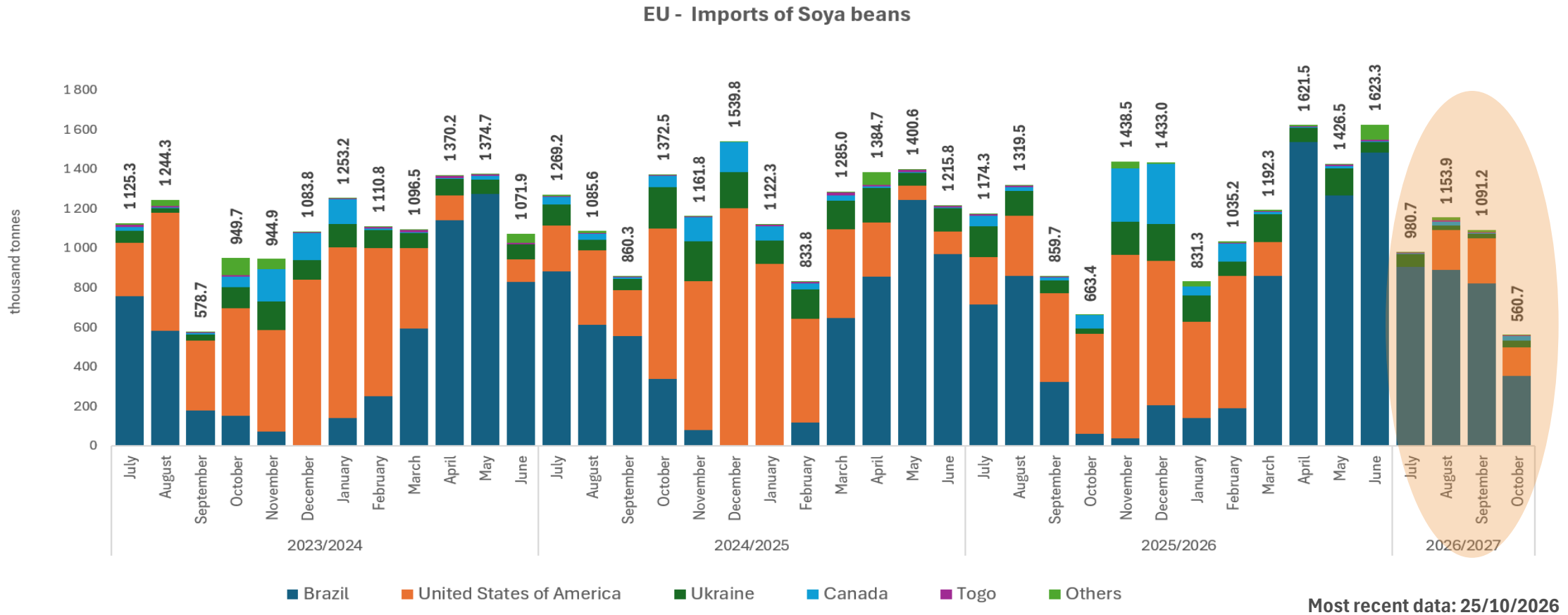
OILSEEDS SUPPLY & DEMAND *(thousand tonnes)*

last updated: 30/10/2026	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	20 170	2 733	8 472	31 375	19 282	2 152	9 602	31 037
Area (thousand ha)	6 037	1 015	4 664	11 715	6 359	959	4 896	12 214
Yield (tonnes/ha)	3.34	2.69	1.82	2.68	3.03	2.25	1.96	2.54
Imports (from third countries)	6 955	14 287	1 373	22 615	6 417	14 487	1 200	22 104
Total supply	**27 958**	**18 320**	**10 723**	**57 000**	**26 533**	**17 939**	**11 680**	**56 152**
Domestic use	26 482	16 702	8 672	51 856	25 301	16 397	10 006	51 704
of which crushing	*(25 912)*	*(14 521)*	*(7 629)*	*(48 062)*	*(24 748)*	*(14 207)*	*(8 772)*	*(47 726)*
Exports (to third countries)	642	317	1 173	2 133	510	275	800	1 585
Total use	**27 124**	**17 020**	**9 845**	**53 989**	**25 811**	**16 672**	**10 806**	**53 289**
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

European Commission

EU imports of soya beans (EU)



Source: Taxud Surveillance

European Commission

Oilmeals balance sheet (EU)

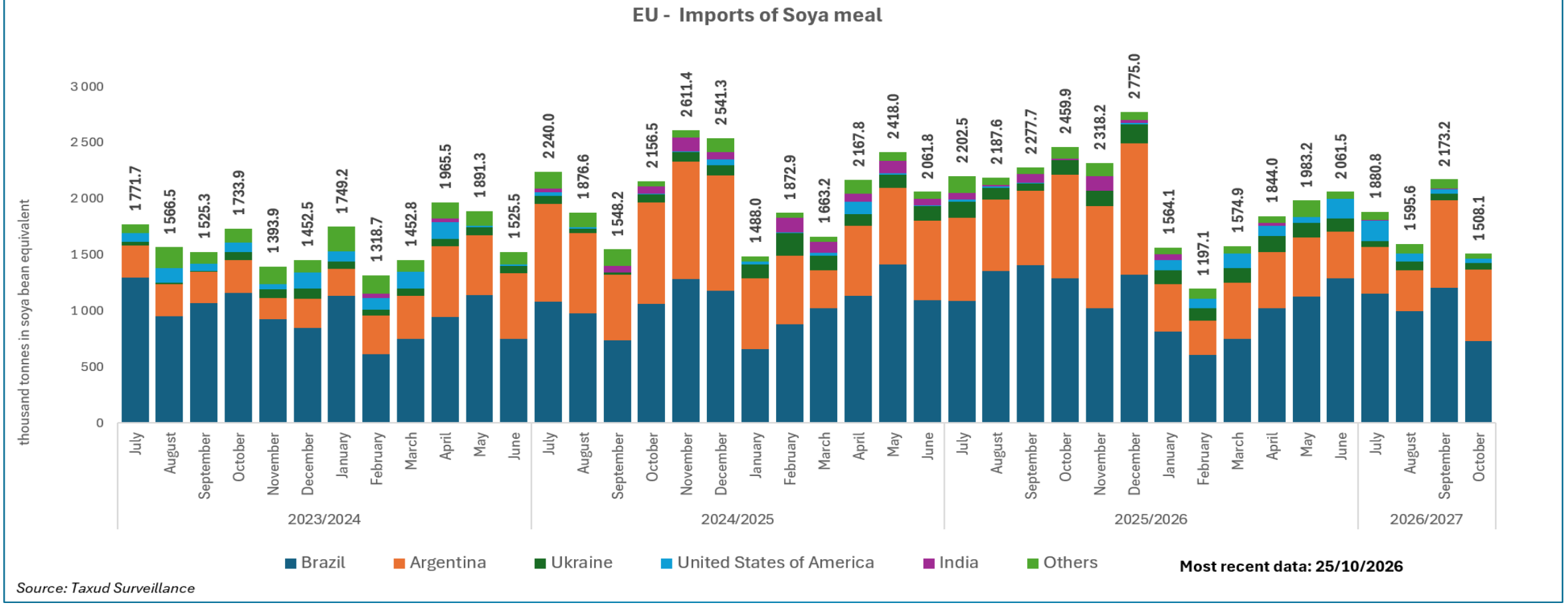
OILSEED MEALS SUPPLY & DEMAND *(thousand tonnes)*

last updated: 30/10/2026	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	14 770	11 472	4 196	30 437	14 106	11 223	4 824	30 154
Imports (from third countries)	862	20 200	2 219	23 281	614	20 500	2 500	23 614
Total supply	**15 682**	**32 014**	**6 515**	**54 210**	**14 770**	**32 065**	**7 424**	**54 260**
Domestic use	14 693	31 144	5 839	51 676	13 870	31 162	6 501	51 532
Exports (to third countries)	939	527	576	2 042	850	562	824	2 235
Total use	**15 632**	**31 672**	**6 415**	**53 718**	**14 720**	**31 723**	**7 324**	**53 767**
Ending stocks	**50**	**342**	**100**	**492**	**50**	**342**	**100**	**492**
Change in stocks	-	-	-	-	-	-	-	-

Sources : EC – DG AGRI

European Commission

EU imports of soya bean meals (EU)



Source: Taxud Surveillance

European Commission

Vegetable oils balance sheet (EU)

VEGETABLE OILS SUPPLY & DEMAND *(thousand tonnes)*

last updated: 30/10/2026	2025/26 fc.					2026/27 proj.				
	Rapeseed	Soya beans	Sunflower	Palm	TOTAL	Rapeseed	Soya beans	Sunflower	Palm	TOTAL
Beginning stocks	**592**	**175**	**271**	**487**	**1 525**	**592**	**175**	**271**	**487**	**1 525**
Usable production	10 624	2 904	3 204	0	16 732	10 146	2 841	3 684	0	16 672
Imports (from third countries)	623	781	2 304	3 038	6 746	800	630	2 297	2 639	6 367
Total supply	**11 839**	**3 861**	**5 779**	**3 525**	**25 003**	**11 538**	**3 646**	**6 253**	**3 127**	**24 564**
Domestic use	10 597	3 045	4 816	2 928	21 386	10 318	2 672	5 235	2 507	20 732
Exports (to third countries)	650	640	692	110	2 092	629	799	747	132	2 307
Total use	**11 247**	**3 686**	**5 508**	**3 038**	**23 478**	**10 947**	**3 471**	**5 982**	**2 639**	**23 039**
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

European Commission

Balance sheets 2026/27 (EU)

Changes from previous Committee meeting

- For **2026/27, EU oilseed imports** are revised upwards, to **22.1 million tonnes**. The increase is entirely driven by **sunflower seed imports**, raised by around **0.2 million tonnes** to **1.2 million tonnes**, reflecting higher domestic demand and further increase in imports from Argentina. Sunflower seed exports are projected to increase to 0.8 million tonnes.
- Total **meal production** is currently estimated at 30.2 million tonnes (2% above the five-year average). EU **oilseed meal imports** remain unchanged at 23.6 million tonnes (13% above the five-year average). Soya bean meal imports are expected at 20.5 million tonnes (17% above the five-year average).
- For marketing year **2026/27**, **vegetable oil production** is reduced slightly to 16.7 million tonnes, 3% above the five-year average, driven largely by higher rapeseed oil output (up 3% from the five-year average) and sunflower seed oil (up 1% from the five-year average). Total **EU imports** are revised upwards, reaching 6.4 million tonnes, driven by higher rapeseed oil imports.

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.



© European Union 2020

Unless otherwise noted the reuse of this presentation is authorised under the CC BY 4.0 license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

European Commission