



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - Public distribution

**Date:** 7/3/2008

**GAIN Report Number:** E48073

## EU-27

### Oilseeds and Products

### Oilseeds Update June 2008

### 2008

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**Report Highlights:**

MY 2008/09 production estimates for EU-27 soybeans, rapeseed, and sunflower seeds have been revised down slightly compared to previous forecasts. Rapeseed production is expected to have suffered from lack of rain in north-east Germany, while updated information on sowing resulted in the changes in the soybean and sunflower estimates.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Quarterly Report  
Berlin [GM1]  
[E4]

## Introduction

This report presents the outlook for oilseeds in the EU-27. The data in this report is based on the views of Foreign Agricultural Service (FAS) analysts in the EU and is not official USDA data.

This report was a group effort of the following FAS analysts:

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## Abbreviations used in this report

Benelux	= Belgium, the Netherlands, and Luxembourg
Ha	= Hectares
MT	= Metric ton (1000 kg)
MS	= EU Member States
MY	= Marketing Year

**Soybean Complex:**

(Coordination: Marie-Cecile Henard)

PSD Table									
Country:	EU27								
Commodity:	Soybean								
	2006/07			2007/08			2008/09		
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Marketing Year Begin	10/2006			10/2007			10/2008		
Area	494	494	494	341	341	341	302	302	290
Beginning Stocks	740	978	978	1,123	1,399	1,399	910	1,093	1,093
Production	1228	1,241	1,241	723	723	723	768	768	740
Extra EU27 imports	15289	15,291	15,291	15,150	14,200	14,250	14,200	13,700	13,700
<b>TOTAL SUPPLY</b>	<b>17,257</b>	<b>17,510</b>	<b>17,510</b>	<b>16,996</b>	<b>16,322</b>	<b>16,372</b>	<b>15,878</b>	<b>15,561</b>	<b>15,533</b>
Extra EU27 exports	47	47	47	45	13	13	45	20	20
Crush	14670	14,555	14,555	14,700	13,600	13,650	13,545	13,300	13,270
Food Use	117	109	109	117	108	108	118	105	105
Feed, Seed, Waste	1300	1,400	1,400	1,224	1,508	1,508	1,302	1,350	1,350
TOTAL Use	16,087	16,064	16,064	16,041	15,216	15,266	14,965	14,755	14,725
Ending Stocks	1123	1,399	1,399	910	1,093	1,093	868	786	788
<b>TOTAL DISTRIBUTION</b>	<b>17,257</b>	<b>17,510</b>	<b>17,510</b>	<b>16,996</b>	<b>16,322</b>	<b>16,372</b>	<b>15,878</b>	<b>15,561</b>	<b>15,533</b>

Commodity:	Soybean Meal								
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Marketing Year Begin	10/2006			10/2007			10/2008		
Crush	14,670	14,555	14,555	14,700	13,600	13,650	13,545	13,300	13,270
Extraction Rate	0.787	0.787	0.787	0.787	0.787	0.788	0.788	0.779	0.776
Beginning Stocks	866	866	866	852	1,165	1,165	860	965	965
Production	11550	11450	11,450	11,575	10,700	10,750	10,670	10,360	10,300
Extra EU27 imports	22075	22168	22,168	24,400	23,500	23,450	23,500	22,700	22,750
<b>TOTAL SUPPLY</b>	<b>34,491</b>	<b>34,484</b>	<b>34,484</b>	<b>36,827</b>	<b>35,365</b>	<b>35,365</b>	<b>35,030</b>	<b>34,025</b>	<b>34,015</b>
Extra EU25 exports	547	527	527	450	500	500	450	500	500
Industrial	10	10	10	10	10	10	10	10	10
Food Use	32	32	32	32	32	32	32	32	32
Feed, Seed, Waste	33050	32750	32,750	35,475	33,858	33,858	33,678	32,518	32,518
TOTAL Use	33,092	32,792	32,792	35,517	33,900	33,900	33,720	32,560	32,560
Ending Stocks	852	1165	1,165	860	965	965	860	965	955
<b>TOTAL DISTRIBUTION</b>	<b>34,491</b>	<b>34,484</b>	<b>34,484</b>	<b>36,827</b>	<b>35,365</b>	<b>35,365</b>	<b>35,030</b>	<b>34,025</b>	<b>34,015</b>

Commodity:	Soybean Oil								
	USDA official	E48062	Post Estimate s (new)	USDA official	E48062	Post Estimate s (new)	USDA official	E48062	Post Estimate s (new)
Marketing Year Begin	10/2006			10/2007			10/2008		
Crush	14,670	14,555	14,555	14,700	13,600	13,650	13,545	13,300	13,270
Extraction Rate	0.180	0.179	0.179	0.180	0.180	0.182	0.180	0.180	0.179
Beginning Stocks	194	194	194	200	234	234	203	256	256
Production	2640	2600	2,600	2,645	2,450	2,480	2,438	2,400	2,380
Extra EU27 imports	969	969	969	1,000	1,250	1,220	950	1,350	1,370
<b>TOTAL SUPPLY</b>	<b>3,803</b>	<b>3,763</b>	<b>3,763</b>	<b>3,845</b>	<b>3,934</b>	<b>3,934</b>	<b>3,591</b>	<b>4,006</b>	<b>4,006</b>
Extra EU27 exports	243	243	243	250	300	300	200	300	300
Industrial	1555	286	286	1,585	290	290	1,500	290	290
Biofuels		1280	1,280	-	1,300	1,300	-	1,400	1,400
Food Use	1675	1580	1,580	1,675	1,600	1,600	1,600	1,600	1,600
Feed, Seed, Waste	130	140	140	132	188	188	130	200	200
<b>TOTAL Use</b>	<b>3,360</b>	<b>3,286</b>	<b>3,286</b>	<b>3,392</b>	<b>3,378</b>	<b>3,378</b>	<b>3,230</b>	<b>3,490</b>	<b>3,490</b>
Ending Stocks	200	234	234	203	256	256	161	216	216
<b>TOTAL DISTRIBUTION</b>	<b>3,803</b>	<b>3,763</b>	<b>3,763</b>	<b>3,845</b>	<b>3,934</b>	<b>3,934</b>	<b>3,591</b>	<b>4,006</b>	<b>4,006</b>

**EU-27:**

Soybeans: Marketing year (MY) 2007/08 soybean imports were revised up due to increased Italian imports, resulting in higher crush especially in Greece. MY 2008/09 soybean production was revised down, mainly due to reduced estimates for plantings in Romania, and despite increased acreage in Italy. As a result, crush was revised down.

Soybean meal: MY 2007/08 soybean meal production was revised up as a result of higher crush, therefore reducing import estimates. In MY 2008/09, reduced crush is expected to result in lower soybean meal production, and therefore higher imports than expected.

Soybean oil: Similar trends as for soybean meal are expected in MY 2007/08 and MY 2008/09.

**Comments from Member States****Greece:**

MY 2007/08 and MY 2008/09 soybean crush were revised slightly upwards due to a reported higher demand by compound feed manufacturers and more soybean oil demand for biofuel. Ending stocks are expected to be reduced to the minimum. Both MY 2007/08 and MY 2008/09 columns are based on rough estimates. As of June 30, no official figures are available.

**Hungary:**

Area planted with soybeans decreased this year. Due to good weather, however, crop forecasts are higher than the drought stricken harvest last year. This minor crop (64,000 MT) is mainly processed by non-crush food and feed processors; therefore there is no effect on the soybean meal imports.

**Italy:**

Area is forecast slightly over previous projection (but anyhow lower than last year), as some fields already planted to corn in the Po valley were badly affected by excessive rain, and were replanted with soybeans.

**Romania:**

Data currently available indicate a lower than anticipated area planted with soybeans (80,000 ha compared to 103,000 ha). Under the conditions of a lower production, crush figure was revised down, while the import figure was increased. Soybean meal production was revised down with meal ending stocks anticipated to diminish.

**Rapeseed Complex**

(Coordination: Sabine Lieberz)

Commodity:	Rapeseed (1000 MT)								
	2006/07			2007/08			2008/09		
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Marketing Year Begin	7/2006			7/2007			7/2008		
Area	5,408	5,408	5,408	6,556	6,553	6,553	6,380	6,380	6,393
Beginning Stocks	1,727	1,729	1,729	1,658	1,651	1,651	1,381	1,181	1,070
Production	16,087	15,904	15,904	18,320	18,320	18,375	19,008	19,250	18,920
Extra EU27 imports	432	409	409	550	900	750	1,550	1,250	1,550
<b>TOTAL SUPPLY</b>	<b>18,246</b>	<b>18,042</b>	<b>18,042</b>	<b>20,528</b>	<b>20,871</b>	<b>20,776</b>	<b>21,939</b>	<b>21,681</b>	<b>21,540</b>
Extra EU27 exports	75	56	56	375	240	200	225	200	150
Crush	15,580	15,535	15,535	17,863	18,700	18,730	19,200	19,700	19,700
Food Use	-	-	-	-	-	-	-	-	-
Feed, Seed, Waste	933	800	800	909	750	776	919	700	690
<b>TOTAL Use</b>	<b>16,513</b>	<b>16,335</b>	<b>16,335</b>	<b>18,772</b>	<b>19,450</b>	<b>19,506</b>	<b>20,119</b>	<b>20,400</b>	<b>20,390</b>
Ending Stocks	1,658	1,651	1,651	1,381	1,181	1,070	1,595	1,081	1,000
<b>TOTAL DISTRIBUTION</b>	<b>18,246</b>	<b>18,042</b>	<b>18,042</b>	<b>20,528</b>	<b>20,871</b>	<b>20,776</b>	<b>21,939</b>	<b>21,681</b>	<b>21,540</b>

Commodity:	Rapeseed Meal (1000 MT)								
	2006/07			2007/08			2008/09		
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Marketing Year Begin	7/2006			7/2007			7/2008		
Crush	15,580	15,535	15,535	17,863	18,700	18,730	19,200	19,700	19,700
Extraction Rate	0.576	0.571	0.571	0.575	0.572	0.574	0.576	0.574	0.574
Beginning Stocks	95	95	96	84	261	261	100	250	250
Production	8,970	8,865	8,865	10,280	10,700	10,750	11,050	11,300	11,300
Extra EU27 imports	106	106	106	110	110	120	110	90	90
TOTAL SUPPLY	9,171	9,066	9,067	10,474	11,071	11,131	11,260	11,640	11,640
Extra EU25 exports	64	64	64	150	150	160	150	160	160
Industrial	-	-	-	-	23	23	-	33	33
Food Use	-	-	-	-	-	-	-	-	-
Feed, Seed, Waste	9,023	8,741	8,741	10,224	10,648	10,698	11,000	11,167	11,167
TOTAL Use	9,023	8,741	8,741	10,224	10,671	10,721	11,000	11,200	11,200
Ending Stocks	84	261	261	100	250	250	110	280	280
TOTAL DISTRIBUTION	9,171	9,066	9,066	10,474	11,071	11,131	11,260	11,640	11,640

Commodity:	Rapeseed oil (1000 MT)								
	2006/07			2007/08			2008/09		
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Marketing Year Begin	7/2006			7/2007			7/2008		
Crush	15,580	15,535	15,535	17,863	18,700	18,730	19,200	19,700	19,700
Extraction Rate	0.415	0.409	0.409	0.415	0.406	0.406	0.415	0.414	0.414
Beginning Stocks	192	192	193	189	200	200	190	300	315
Production	6,465	6,353	6,353	7,413	7,600	7,600	7,960	8,150	8,150
Extra EU27 imports	727	727	727	300	300	280	250	400	480
TOTAL SUPPLY	7,384	7,272	7,273	7,902	8,100	8,080	8,400	8,850	8,945
Extra EU27 exports	51	51	51	80	80	80	125	80	70
Industrial	4,768	530	530	4,800	510	510	5,495	510	510
Biofuels	-	4,410	4,410	-	5,100	5,065	-	5,950	6,035
Food Use	2,371	2,071	2,071	2,827	2,100	2,100	2,555	2,100	2,100
Feed, Seed, Waste	5	10	10	5	10	10	5	10	10
TOTAL Use	7,144	7,021	7,021	7,632	7,720	7,685	8,055	8,570	8,655
Ending Stocks	189	200	200	190	300	315	220	200	220
TOTAL DISTRIBUTION	7,384	7,272	7,272	7,902	8,100	8,080	8,400	8,850	8,945

Rapeseed kernels are small and their development in the pods is difficult to assess from the outside. This makes production estimate for rapeseed prior to harvest difficult. Harvest has already started in Romania and in some regions of Hungary and France. Germany is

expected to start harvesting in the second week of July; the U.K. is expected to follow in the third week of July.

**EU-27:**

MY 2007/08 rapeseed production was revised upward because of new data from France and Romania. Trade was revised taking into account eleven months of trade data for the current marketing year. Ending stocks are expected to be even lower than anticipated as a result of lower EU-27 imports and higher crush (Romania and Greece).

Rapeseed production for MY 2008/09 was revised downwards as reduced estimates in Germany and the UK are not fully compensated by increases in Hungary, France, and Austria. As a result, imports are expected to be higher than previously expected, while export expectations, feed, seed, waste use, and ending stocks are expected to be lower.

Rapeseed oil use for biofuels in MY 2008/09 is expected to exceed previous expectations in France, Greece and the U.K. This is anticipated to lead to higher rapeseed oil imports than previously expected.

## **Comments from Member States**

**Austria**

The estimate for rapeseed area increased. Expectations for rapeseed crop are good, weather conditions have been favorable. However, total harvest may go down due to thunderstorms the last days and weeks – reliable numbers on the damage are not yet available.

**Bulgaria**

Rapeseeds harvest has started all over the country and is expected to be completed by mid-July. Farmers report higher than previously estimated yields reaching over 3.0 MT/ha in major production regions compared to average 2.0 MT/ha in previous years. Some industry sources increased their production estimates to 200,000 MT, however, it is considered premature until harvest is completed. Weather is favorable and quality issues (and losses) are not anticipated. Farmers enjoy attractive market prices, double those a year ago, and export sales are likely to start soon after the harvest is over.

**Czech Republic**

Rapeseed is in good condition and farmers expect very good yields, at least 3.1 MT/ha. The harvested area this year shouldn't significantly differ from the sown area.

**France**

French rapeseed production was revised slightly up as a result of both higher acreage and yields than expected. The resulting production is estimated to go to crush. Increased rapeseed meal production is expected to result in higher animal feed consumption, while larger rapeseed oil production is likely to result in larger use for biodiesel.

**Germany**

The situation in Germany is geographically divided. The north east suffered from lack of rain in May and first half of June, which will translate into lower yields, especially on marginal land. In the south and west, sufficient rain resulted in good plant development. Since a substantial share of the rapeseed production is located in the north east, the production estimate for MY 2008/09 has been revised downward.

**Hungary**

Rapeseed area remained unchanged but crop expectations, 647,000 MT, are 14% higher than at the time of the last report. The harvest has started in some regions.

**Poland**

The drought in the north of Poland was already factored into the estimate for the previous report.

**Romania**

A significantly higher rapeseed area was sown in the fall 2007 (457,000 ha), but unfavorable weather and incorrect technology application reduced the area estimated to be harvested by 15%. Yields are expected to be significantly up compared to last year.

**Slovakia**

This year's harvest is estimated average or little below average, with yields expected to average 2 MT/ha.

**United Kingdom**

UK rapeseed production has been revised slightly downward since plantings are lower. Also, there is variability in quality, and yields are expected to be below average.

**Sunflower Seeds Complex**

(Coordination: Monica Dobrescu)

**Commodity: Sunflowers**

Calendar Year Begin	10/2006			10/2007			10/2008		
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Area	3,978	3,943	3,943	3,424	3,389	3,389	3,716	3,681	3,620
Beginning Stocks	662	662	662	630	500	500	271	190	160
Production	6,502	6,482	6,482	4,781	4,760	4,760	6,482	6,300	6,200
Extra EU27 imports	570	570	570	300	300	300	668	350	450
<b>TOTAL SUPPLY</b>	7,734	<b>7,714</b>	<b>7,714</b>	5,711	<b>5,560</b>	<b>5,560</b>	7,421	<b>6,840</b>	<b>6,810</b>
Extra EU27 exports	749	749	749	400	300	480	625	700	650
Crush	5,501	5,600	5,600	4,462	4,450	4,350	5,450	5,250	5,250
Food Use	210	220	220	210	220	220	215	225	225
Feed, Seed, Waste	644	645	645	368	400	350	663	430	430
<b>TOTAL Use</b>	6,355	<b>6,465</b>	<b>6,465</b>	5,040	<b>5,070</b>	<b>4,920</b>	6,328	<b>5,905</b>	<b>5,905</b>
Ending Stocks	630	500	500	271	190	160	468	235	255
<b>TOTAL DISTRIBUTION</b>	7,734	<b>7,714</b>	<b>7,714</b>	5,711	<b>5,560</b>	<b>5,560</b>	7,421	<b>6,840</b>	<b>6,810</b>

## Sunflower Meal (1,000 MT)

Calendar Year Begin	10/2006			10/2007			10/2008		
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Crush	5,501	5,600	5,600	4,462	4,450	4,350	5,450	5,250	5,250
Extraction Rate	0.545	0.530	0.530	0.545	0.530	0.536	0.546	0.530	0.530
Beginning Stocks	105	105	105	85	98	98	43	58	58
Production	3,000	2,970	2,970	2,430	2,360	2,310	2,975	2,780	2,780
Extra EU27 imports	1,770	1,770	1,770	1,550	1,650	1,650	1,750	1,550	1,550
<b>TOTAL SUPPLY</b>	4,875	<b>4,845</b>	<b>4,845</b>	4,065	<b>4,108</b>	<b>4,058</b>	4,768	<b>4,388</b>	<b>4,388</b>
Extra EU27 exports	146	147	147	128	100	100	148	150	150
Industrial	4	-	-	4	-	-	4	-	-
Food Use	-	-	-	-	-	-	-	-	-
Feed, Seed, Waste	4,640	4,600	4,600	3,890	3,950	3,900	4,573	4,150	4,150
<b>TOTAL Use</b>	4,644	<b>4,600</b>	<b>4,600</b>	3,894	<b>3,950</b>	<b>3,900</b>	4,577	<b>4,150</b>	<b>4,150</b>
Ending Stocks	85	98	98	43	58	58	43	88	88
<b>TOTAL DISTRIBUTION</b>	4,875	<b>4,845</b>	<b>4,845</b>	4,065	<b>4,108</b>	<b>4,058</b>	4,768	<b>4,388</b>	<b>4,388</b>

## Sunflower Oil (1,000 MT)

Calendar Year Begin	10/2006			10/2007			10/2008		
	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)	USDA official	E48062	Post Estimates (new)
Crush	5,501	5,600	5,600	4,462	4,450	4,350	5,450	5,250	5,250
Extraction Rate	0.400	0.422	0.422	0.399	0.422	0.420	0.399	0.422	0.422
Beginning Stocks	283	283	283	240	270	270	116	90	90
Production	2,200	2,365	2,365	1,780	1,880	1,840	2,175	2,215	2,215
Extra EU27 imports	1,184	1,171	1,171	1,000	1,200	1,100	1,250	1,300	1,300
<b>TOTAL SUPPLY</b>	3,667	<b>3,819</b>	<b>3,819</b>	3,020	<b>3,350</b>	<b>3,310</b>	3,541	<b>3,605</b>	<b>3,605</b>
Extra EU27 exports	149	148	148	120	100	100	125	130	130
Industrial	115	90	90	115	90	90	118	90	90
Biofuels	-	240	240	-	200	200	-	250	250
Food Use	3,160	3,050	3,050	2,667	2,850	2,710	3,125	3,000	3,000
Feed, Seed, Waste	3	21	21	2	20	20	2	22	22
<b>TOTAL Use</b>	3,278	<b>3,401</b>	<b>3,401</b>	2,784	<b>3,160</b>	<b>3,130</b>	3,245	<b>3,362</b>	<b>3,362</b>
Ending Stocks	240	270	270	116	90	90	171	113	113
<b>TOTAL DISTRIBUTION</b>	3,667	<b>3,819</b>	<b>3,819</b>	3,020	<b>3,350</b>	<b>3,310</b>	3,541	<b>3,605</b>	<b>3,605</b>

## EU-27

Due to increasing demand from third countries and world market prices MY 2007/2008 estimates for EU-27 sunflower seeds export have been increased to 480,000 MT, mainly from Romania and Bulgaria. These higher exports will result in a lower crush and smaller ending stocks. Recent quality issues encountered by Ukraine are likely to lead to lower EU-27 sunflower oil imports.

MY 2008/09 sunflower seeds area and the estimated production have been revised down slightly, as more updated information on sowing became available. Prospects for a good harvest continue in most of the producing Member States. Nevertheless, some regions in south-eastern Europe (Romania and Bulgaria) require rain in the coming weeks in order to continue normal crop development.

## **Comments from Member States**

### **Austria**

Yields are expected to be good in 2008. However total harvest may go down due to recent thunderstorms. Reliable numbers on the damage are not available yet.

### **Benelux**

MY 2007/08 crush and consequently production of meal and oil haven been revised downward. As a result, exports to other EU member states are lower than previously expected.

### **Bulgaria**

Current dry and hot weather with temperatures exceeding 33-35 C while favorable for fall crops harvest raises a red flag for spring crops. Sunflower is developing very well but due to massive vegetative growth rains are needed to sustain potential production. Critical period remains in the next 2-3 weeks to see if sunflower may loose some potential yield. If the weather does not become cooler and there are no rains, some revision in yields may be needed to lower the production by the second half of July.

### **France**

For the MY 2008/09 crop, acreage was revised up but production data remained unchanged, as a result of the yield uncertainty.

### **Germany**

Area has been revised slightly upwards. However, most sunflowers are grown in the north-east of Germany which suffered from a lack of rain in May and the first half of June. As a result, yields are expected to be below previous expectations and production estimate has been lowered.

### **Greece**

Sunflower oil utilization for biofuel has been revised upwards both for MY 2007/08 and 2008/09. It is expected that demand for food will drop significantly due to a recent sunflower oil contamination scandal and most of amounts will be channeled to biofuel.

### **Hungary**

With 560,000 ha final sunflower area exceeded previous expectations. Fields are in excellent condition so far, thank to timely but not excessive rainfall.

### **Romania**

Based on the current official data, MY 2008/2009 sunflower area is slightly lower than previously anticipated. In addition, the forecast for dry summer weather is expected to generate slightly lower yields than previously projected. However, production is expected to reach 1.4 million MT, almost triple last year's level, when the crop was severely affected by high temperatures.

**Slovakia**

The situation is much better compared to last year, because of good weather during sowing period. So far the plants are in satisfactory health condition, and yields are expected to be higher than last year.

**Related Reports:**

Report Number	Title	Date Released
E48062	Oilseeds Annual <a href="http://www.fas.usda.gov/gainfiles/200806/146294804.pdf">http://www.fas.usda.gov/gainfiles/200806/146294804.pdf</a>	05/30/2008