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## **Report Name:** Oilseeds and Products Annual

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**Report Category:** Oilseeds and Products

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### **Report Highlights:**

MY2022/23 is characterized by a small decrease in rapeseed production and an increase in imports of soybean meal and oil. Total United Kingdom (UK) rapeseed area in MY2022/23 is forecast to increase by 17 percent with an anticipated yield of 3Mt per hectare, slightly below the Defra five-year average of 3.3Mt per hectare. Yield is expected to remain low as farmers experience increased input costs, especially fertilizers. UK rapeseed production remains low, and demand for seeds, oils and meals is growing. This can only partially be offset by increasing rapeseed and soybean imports. Demand for oilseed meals for livestock feed use is expected to remain at current levels with a small year on year increase. The reopening of hospitality (restaurants and hotels) post COVID increased the share of oil in food consumption. Growers and Crushers are expected to use substitutions in MY2022/23 in the production of meals and oils as a result of Russia's invasion of Ukraine.

**Disclaimer/Important Notes:** Effective January 1, 2021, the United Kingdom (UK) completed its departure from the European Union (EU). This report presents Post's second outlook for oilseeds and products, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2022/23, as well as estimates for MY2020/21 and MY2021/22. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the UK and is not official USDA data.

Russia's invasion of Ukraine starting February 24, 2022, has significantly impacted global markets. The conflict could displace a significant volume of oilseeds and the products derived from these. It also introduces many uncertainties, which create a very volatile situation and developments may change quickly.

USDA official numbers in this report include the World Agricultural Supply and Demand Estimates (WASDE) March 2022 release.

Trade figures are revised according to the most recent data available from Trade Data Monitor (December 2022).

Acronyms used in this report:

FAS Foreign Agricultural Service

Ha Hectares

MHa Thousand hectares

MMT Million Metric Tons

MT Metric Ton (1000 kg)

MY Marketing Year.

TMT Thousand Metric Tons

UK United Kingdom

U.S. United States

The marketing years used in this report are:

January - December

Copra oil

Palm kernel complex

Palm oil  
Fish meal

#### July - June

Rapeseed complex

#### October - September

Soybean complex  
Sunflower complex  
Peanut seed

#### November - October

Olive oil

### **Executive Summary**

Total UK rapeseed oilseed production in MY2022/23 is forecast to be 1.1 MMT, this is 100 TMT higher than MY2021/22 and nearly 60 TMT higher than MY2020/21. The planting area for MY2022/23 will increase slightly but is still close to the 20-year low of MY2021/22 due to the loss of pesticides, continued yield issues, and volatile input costs. UK arable farmers are now assessing the risk of starting a rapeseed crop when input costs and market price are highly volatile. UK farmers are no longer constrained by the Common Agricultural Policy (CAP) and are expected to make planting decisions for all crops much closer to the planting season than previous years. Market fluctuation in both the costs of fertilizer and the potential value of crops will also influence farmers crop choices.

The UK is now a net importer of rapeseed oilseed, low domestic production has led to increased imports of oilseed, meal, and oil. There is also an increase in feed substitution in the livestock sector to compensate and soybean is the main substitution. Soybean seed and meal imports also have associated risks and certain varieties are restricted as the UK has not yet unilaterally approved the numerous GM events already approved by the EU.

The Ukrainian crisis makes the global agricultural commodity markets, including the oilseeds market, very volatile. Depending on further developments, oilseeds market conditions and current assumptions made in this report may change fast and significantly.

The outlook for marketing year (MY) 2022/23 is highly uncertain and depends to a great extent upon developments in the Ukraine.

### **Rapeseed - Oilseed**

#### **Production**

The total UK rapeseed area is forecast to increase by 17 percent to 359 MHa in MY2022/23 from 307 MHa in MY2021/22. A small rebound in the volume of domestic rapeseed produced is expected. The

planting area remains significantly below historic levels. In 2012, the rapeseed area peaked at 756 MHa and has dropped in area almost every year thereafter. Sources suggest that the decline in growing area has plateaued, but a volatile input market means growers are making planting decisions late in the day, for this reason area yield is not expected to rise above the five-year average of 3.3 Mt per hectare in MY 2022/23. The reason for the substantial decrease in rapeseed area is the ban on neonicotinoids in the UK. Higher costs and lower yields make rapeseed less competitive compared to other crops. The rapeseed harvest decreased by 5.5 percent to 981 Tmt in MY2021/22. This was caused by a decrease of 19 percent in the planted area. The total rapeseed yield showed an increase of almost 17 percent from 2.7 Mt per hectare in MY2020/21 to 3.2 Mt per hectare in MY2021/22; just slightly below the five-year average of 3.3 Mt per hectare. A yield of 3.0 Mt is forecast for MY2022/23; current crops are in good condition having had favorable weather but high input costs is expected to have resulted in farmers reducing fertilizer application rates which will reduce yield.

### **Consumption**

The primary consumption of rapeseed oilseeds in the UK is for products after crushing- rapeseed meal and rapeseed oil. Rapeseed oil is the most important driver and is used for human consumption quality oil which is a high-end product. The UK consumes almost 2.5Mt of rapeseed every year as seed, oil, or meal. With pressure on other oilseed imports, this figure is expected to steadily increase year on year as rapeseed meal and oil are suitable substitutions in livestock food and human food production.

### **Trade**

The UK was historically a net exporter of rapeseed oilseeds; however, it has been a net importer for over five years, there is little sign domestic production will return to previous levels of self-sufficiency. Between July 2021 and January 2022, the UK imported over 633 Tmt of rapeseed oilseed, compared to 454 Tmt in the same months in MY2020/21. This was partly driven by traders and farmers purchasing earlier than usual in response to market volatility. Imports for MY2021/22 are expected to average slightly above the normal trend, despite the significant increase in the first half of MY2021/22 and the forecast is for MY2022/23 to follow a similar trend. There was a large increase in rapeseed oilseeds imported from Ukraine from 95Tmt in MY2019/20 and 253 Tmt in MY2020/21, this was predominately a result of price. Between July 2021 and January 2022 the UK had imported 238 Tmt from Ukraine, no further imports are expected for MY2021/22. Imports from the EU fell by 47 percent in MY2020/21 to 174 Tmt, imports for MY2021/22 have already passed this, and the forecast is for imports from the EU to return to pre-Covid levels by the end of MY2022/23. The UK also significantly reduced the volume of rapeseed oilseed exports in MY2021/22 with exports down 78 percent between July 2021 and January 2022 compared to the same months in MY2020/21. This is partly a result of trade routes shifting post-Brexit. UK exports for MY2021/22 is not expected to exceed 25 Tmt and is forecast to be 20 Tmt for MY2022/23.

## Stocks

Stocks of rapeseed oilseed are forecast to remain low in the UK. There is an expectation that stocks will remain low for MY2021/22 and will then increase closer to historic levels but not before MY2022/23.

### *Rapeseed Oilseed Table*

Oilseed, Rapeseed Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	380	380	305	307	0	359
Area Harvested (1000 HA)	379	379	305	307	0	359
Beginning Stocks (1000 MT)	84	84	96	78	0	64
Production (1000 MT)	1050	1038	980	981	0	1100
MY Imports (1000 MT)	661	660	760	740	0	800
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	183	183	185	0	0	0
Total Supply (1000 MT)	1795	1782	1836	1799	0	1964
MY Exports (1000 MT)	64	69	20	25	0	20
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	1575	1575	1700	1650	0	1800
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	60	60	55	60	0	60
Total Dom. Cons. (1000 MT)	1635	1635	1755	1710	0	1860
Ending Stocks (1000 MT)	96	78	61	64	0	84
Total Distribution (1000 MT)	1795	1782	1836	1799	0	1964
CY Imports (1000 MT)	650	650	650	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	100	100	90	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	2.7704	2.7388	3.2131	3.1954	0	3.0641
(1000 HA) ,(1000 MT) ,(MT/HA)						

## Rapeseed meal

### Production

As with other crops rapeseed meal production rebounded in MY2021/22 to just below MY2019/20 levels and is forecast to increase by 12 percent for MY2022/23. With the declining area of crop grown in the UK this production will consist of a significant proportion of imported oilseed. Supply of rapeseed meal is tight globally and demand from the UK is rising.

### Feed Consumption

The demand for rapeseed meal comes from the UK livestock sector. The UK is a leading producer and exporter of meat and dairy products; however, numbers of livestock did reduce as a result of Brexit uncertainty. The forecast for MY2022/23 is for the demand to remain close to MY2021/22 levels. Rapeseed meal competes with soybeans and soybean meal from the United States and other suppliers as well as domestic sunflower meal and grains in feed ratios. In dairy production, rapeseed meal has

become the dominant protein source and it can replace soybean meal to a certain extent in meat production. Due to its high protein content, soybean meal remains the top choice in feed ratios for poultry and swine. Due to market volatility in input costs farmers will substitute different meals in livestock feeding regimen, the scale of substitution is difficult to forecast.

### *Rapeseed Meal Table*

Meal, Rapeseed Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	1575	1575	1700	1650	0	1800
Extr. Rate, 999.9999 (PERCENT)	0.5708	0.5683	0.57	0.5709	0	0.5678
Beginning Stocks (1000 MT)	78	78	84	80	0	87
Production (1000 MT)	899	895	969	942	0	1022
MY Imports (1000 MT)	390	390	250	320	0	340
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1367	1363	1303	1342	0	1449
MY Exports (1000 MT)	58	58	85	95	0	120
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	1225	1225	1160	1160	0	1275
Total Dom. Cons. (1000 MT)	1225	1225	1160	1160	0	1275
Ending Stocks (1000 MT)	84	80	58	87	0	54
Total Distribution (1000 MT)	1367	1363	1303	1342	0	1449
(1000 MT) ,(PERCENT)						

## **Rapeseed Oil**

### **Production**

Demand for rapeseed oil is the main driver for the rapeseed market in the UK. The UK predominately produces oil for food use with a small, but stable, quantity for industrial use. Rapeseed oil production is forecast to increase for MY2022/23 having been impacted by labor availability issues for crushing caused by COVID-19 in MY2020/21. Production in MY2021/22 is forecast to be lower than MY2020/21. Both imports and exports of rapeseed oil have been growing year on year, as rapeseed oil is a suitable alternative sunflower oil exports for MY2022/23 are forecast to be slightly down compared to previous years as domestic consumption increases slightly.

### **Consumption**

Food consumption is higher in MY2021/22 as a direct impact of UK hospitality (restaurants and hotels reopening following COVID-19 lockdowns). Consumption is forecast to rise in MY2022/23 as rapeseed oil is a suitable alternative sunflower oil and will create minimal reformulation issues in the event of sunflower oil shortages. Industrial consumption remains a small part of UK consumption at 15 TMT.

*Rapeseed Oil Table*

Oil, Rapeseed Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b> (1000 MT)	1575	1575	1700	1650	0	1800
<b>Extr. Rate, 999.9999</b> (PERCENT)	0.4006	0.4025	0.4	0.4012	0	0.4011
<b>Beginning Stocks</b> (1000 MT)	48	48	29	33	0	39
<b>Production</b> (1000 MT)	631	634	680	662	0	722
<b>MY Imports</b> (1000 MT)	156	157	70	135	0	160
<b>MY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>MY Imp. from EU</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	835	839	779	830	0	921
<b>MY Exports</b> (1000 MT)	164	164	110	149	0	165
<b>MY Exp. to EU</b> (1000 MT)	0	0	0	0	0	0
<b>Industrial Dom. Cons.</b> (1000 MT)	22	22	15	15	0	15
<b>Food Use Dom. Cons.</b> (1000 MT)	620	620	630	630	0	700
<b>Feed Waste Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Dom. Cons.</b> (1000 MT)	642	642	645	645	0	715
<b>Ending Stocks</b> (1000 MT)	29	33	24	39	0	41
<b>Total Distribution</b> (1000 MT)	835	839	779	830	0	921
(1000 MT) ,(PERCENT)						

## Soybean Seed

### Consumption and Trade

The UK imports a significant amount of soybean each year, predominately for use in crushing but also for food use, and livestock feed. The main supplier is Brazil, followed by Canada and the United States. Soybean imports compete directly with rapeseed in the livestock feed sector. Soybean imports for crushing continue to increase, post forecasts a 6 percent increase in crushing for MY2021/22 and again in MY2022/23.

#### *Soybean Seed Table*

Oilseed, Soybean Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	7	7	14	14	0	15
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	671	671	650	697	0	739
MY Imp. from U.S. (1000 MT)	104	104	75	133	0	140
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	678	678	664	711	0	754
MY Exports (1000 MT)	5	5	0	0	0	0
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	590	590	590	636	0	674
Food Use Dom. Cons. (1000 MT)	34	34	34	30	0	30
Feed Waste Dom. Cons. (1000 MT)	35	35	30	30	0	30
Total Dom. Cons. (1000 MT)	659	659	654	696	0	734
Ending Stocks (1000 MT)	14	14	10	15	0	20
Total Distribution (1000 MT)	678	678	664	711	0	754
CY Imports (1000 MT)	0	0	5	5	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	585	585	700	700	0	0
CY Exp. to U.S. (1000 MT)	66	66	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						



## Soybean Meal

The UK is expected to increase the amount of soybean crush by 6 percent for MY2021/22 and MY2022/23, to meet demands from the livestock sector. Feed use of soybean meal is expected to go up compared to MY2020/21 by 3 percent in MY2021/2022. Imports of soybean meal are also forecast to rise to 2.4 MMT in MY2022/23. The major supplier will be Argentina, followed by the EU. Feed usage of soybean meal remains high in MY2021/22 largely supported by the continued inclusion in livestock rations, despite high global prices. A small increase is forecast for MY2022/23, this figure is expected to be revised depending on the amount of feed meal substitution that occurs as a result of the volatile input market.

### *Soybean Meal Table*

Meal, Soybean Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b> (1000 MT)	590	590	590	636	0	674
<b>Extr. Rate, 999.9999</b> (PERCENT)	0.7797	0.7797	0.7763	0.7767	0	0.7774
<b>Beginning Stocks</b> (1000 MT)	128	128	110	110	0	90
<b>Production</b> (1000 MT)	460	460	458	494	0	524
<b>MY Imports</b> (1000 MT)	2231	2231	2200	2300	0	2355
<b>MY Imp. from U.S.</b> (1000 MT)	72	72	73	73	0	0
<b>MY Imp. from EU</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	2819	2819	2768	2904	0	2969
<b>MY Exports</b> (1000 MT)	84	84	65	110	0	90
<b>MY Exp. to EU</b> (1000 MT)	0	0	0	0	0	0
<b>Industrial Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Food Use Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Feed Waste Dom. Cons.</b> (1000 MT)	2625	2625	2625	2704	0	2769
<b>Total Dom. Cons.</b> (1000 MT)	2625	2625	2625	2704	0	2769
<b>Ending Stocks</b> (1000 MT)	110	110	78	90	0	110
<b>Total Distribution</b> (1000 MT)	2819	2819	2768	2904	0	2969
(1000 MT) ,(PERCENT)						

## Soybean Oil

### Consumption and Trade

UK soybean oil imports and food use continue to rise steadily, industrial use has declined as UK biofuel production focuses on grain and corn. Consumption of soybean oil in food continues to increase. Post forecasts a 10% increase in MY2022/23.

#### *Soybean Oil Table*

Oil, Soybean Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	590	590	590	636	0	674
Extr. Rate, 999.9999 (PERCENT)	0.1864	0.222	0.1864	0.1871	0	0.1869
Beginning Stocks (1000 MT)	22	22	14	21	0	15
Production (1000 MT)	110	131	110	119	0	126
MY Imports (1000 MT)	201	200	205	210	0	225
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	180	0	200	0	0
Total Supply (1000 MT)	333	353	329	350	0	366
MY Exports (1000 MT)	24	24	25	25	0	24
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	20	13	15	10	0	10
Food Use Dom. Cons. (1000 MT)	275	295	275	300	0	325
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	295	308	290	310	0	335
Ending Stocks (1000 MT)	14	21	14	15	0	7
Total Distribution (1000 MT)	333	353	329	350	0	366
(1000 MT) ,(PERCENT)						

## Other Oilseeds

### *Sunflowerseed*

Oilseed, Sunflowerseed Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Planted</b> (1000 HA)	0	0	0	0	0	0
<b>Area Harvested</b> (1000 HA)	0	0	0	0	0	0
<b>Beginning Stocks</b> (1000 MT)	0	0	0	8	0	0
<b>Production</b> (1000 MT)	0	0	0	0	0	0
<b>MY Imports</b> (1000 MT)	71	71	50	52	0	52
<b>Total Supply</b> (1000 MT)	71	71	50	60	0	52
<b>MY Exports</b> (1000 MT)	8	8	1	8	0	2
<b>MY Exp. to EU</b> (1000 MT)	0	0	0	0	0	0
<b>Crush</b> (1000 MT)	40	25	25	25	0	25
<b>Food Use Dom. Cons.</b> (1000 MT)	5	8	5	7	0	5
<b>Feed Waste Dom. Cons.</b> (1000 MT)	18	22	19	20	0	20
<b>Total Dom. Cons.</b> (1000 MT)	63	55	49	52	0	50
<b>Ending Stocks</b> (1000 MT)	0	8	0	0	0	0
<b>Total Distribution</b> (1000 MT)	71	71	50	60	0	52
<b>CY Imports</b> (1000 MT)	0	0	0	0	0	0
<b>CY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>CY Exports</b> (1000 MT)	0	0	0	0	0	0
<b>CY Exp. to U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>Yield</b> (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)

*Palm Kernel*

Oilseed, Palm Kernel Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jan 2020		Jan 2021		Jan 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	6	5	5	5	0	5
Total Supply (1000 MT)	6	5	5	5	0	5
MY Exports (1000 MT)	0	0	0	0	0	0
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	6	5	5	5	0	5
Total Dom. Cons. (1000 MT)	6	5	5	5	0	5
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	6	5	5	5	0	5
CY Imports (1000 MT)	6	0	5	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	0	0	0	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)						

*Peanut*

Oilseed, Peanut Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	5	5	39	5	0	5
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	228	177	195	155	0	160
Total Supply (1000 MT)	233	182	234	160	0	165
MY Exports (1000 MT)	9	12	9	10	0	10
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	185	165	190	145	0	150
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	185	165	190	145	0	150
Ending Stocks (1000 MT)	39	5	35	5	0	5
Total Distribution (1000 MT)	233	182	234	160	0	165
CY Imports (1000 MT)	187	0	200	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	9	0	9	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						

## Other Meals

### *Sunflowerseed Meal*

Meal, Sunflowerseed Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	40	25	25	25	0	25
Extr. Rate, 999.9999 (PERCENT)	0.45	0.44	0.44	0.44	0	0.44
Beginning Stocks (1000 MT)	55	55	49	48	0	48
Production (1000 MT)	18	11	11	11	0	11
MY Imports (1000 MT)	308	308	400	298	0	400
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	381	374	460	357	0	459
MY Exports (1000 MT)	7	1	0	1	0	1
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	325	325	425	308	0	410
Total Dom. Cons. (1000 MT)	325	325	425	308	0	410
Ending Stocks (1000 MT)	49	48	35	48	0	48
Total Distribution (1000 MT)	381	374	460	357	0	459

(1000 MT) ,(PERCENT)

### *Palm Kernel Meal*

Meal, Palm Kernel Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jan 2020		Jan 2021		Jan 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	402	503	400	315	0	300
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	402	503	400	315	0	300
MY Exports (1000 MT)	3	0	0	0	0	0
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	399	503	400	315	0	300
Total Dom. Cons. (1000 MT)	399	503	400	315	0	300
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	402	503	400	315	0	300

(1000 MT) ,(PERCENT)

## Fish Meal

Meal, Fish Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jan 2020		Jan 2021		Jan 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Catch For Reduction (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	35	35	35	35	0	35
MY Imports (1000 MT)	104	113	120	104	0	112
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	139	148	155	139	0	147
MY Exports (1000 MT)	4	23	30	4	0	20
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	135	125	125	135	0	127
Total Dom. Cons. (1000 MT)	135	125	125	135	0	127
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	139	148	155	139	0	147
(1000 MT) ,(PERCENT)						

## Other Oils

### Sunflowerseed Oil

Oil, Sunflowerseed Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	40	25	25	25	0	25
Extr. Rate, 999.9999 (PERCENT)	0.45	0.44	0.44	0.44	0	0.44
Beginning Stocks (1000 MT)	71	71	26	20	0	20
Production (1000 MT)	18	11	11	11	0	11
MY Imports (1000 MT)	295	295	300	315	0	350
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	384	377	337	346	0	381
MY Exports (1000 MT)	10	15	10	5	0	5
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	3	1	5	1	0	1
Food Use Dom. Cons. (1000 MT)	345	341	300	320	0	356
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	348	342	305	321	0	357
Ending Stocks (1000 MT)	26	20	22	20	0	19
Total Distribution (1000 MT)	384	377	337	346	0	381
(1000 MT) ,(PERCENT)						

*Palm Kernel Oil*

Oil, Palm Kernel Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jan 2020		Jan 2021		Jan 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	29	29	30	30	0	30
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	29	29	30	30	0	30
MY Exports (1000 MT)	0	0	0	0	0	0
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	29	29	30	30	0	30
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	29	29	30	30	0	30
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	29	29	30	30	0	30

(1000 MT) ,(PERCENT)

*Palm Oil*

Oil, Palm Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jan 2020		Jan 2021		Jan 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	43	43	23	23	0	23
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	390	390	455	420	0	440
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	433	433	478	443	0	463
MY Exports (1000 MT)	5	5	20	20	0	20
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	15	25	20	20	0	20
Food Use Dom. Cons. (1000 MT)	390	380	415	380	0	400
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	405	405	435	400	0	420
Ending Stocks (1000 MT)	23	23	23	23	0	23
Total Distribution (1000 MT)	433	433	478	443	0	463
CY Imports (1000 MT)	390	0	470	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	5	0	35	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)

## Olive Oil

Oil, Olive Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jan 2020		Jan 2021		Jan 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	10	10	10	8	0	6
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	90	85	90	85	0	85
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	100	95	100	93	0	91
MY Exports (1000 MT)	2	2	3	2	0	2
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	88	85	88	85	0	86
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	88	85	88	85	0	86
Ending Stocks (1000 MT)	10	8	9	6	0	3
Total Distribution (1000 MT)	100	95	100	93	0	91
(1000 HA) ,(1000 TREES) ,(1000 MT)						

## Copra Oil

Oil, Coconut Market Year Begins United Kingdom	2020/2021		2021/2022		2022/2023	
	Jan 2020		Jan 2021		Jan 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	27	25	27	26	0	27
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	27	25	27	26	0	27
MY Exports (1000 MT)	1	1	1	1	0	1
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	26	24	26	25	0	26
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	26	24	26	25	0	26
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	27	25	27	26	0	27
(1000 MT) ,(PERCENT)						

## Policy

With its departure from the EU, the UK introduced its [Global Tariff](#), a simplification of the EU regime. In other areas, it continues to follow the EU, but some divergence is expected over time. For example,



with its departure from the EU, the UK has departed the Common Agricultural Policy (CAP) and has introduced a Domestic Agricultural Policy in England, with Wales, Scotland, and Northern Ireland developing their own CAP replacements.

The UK and EU agreed to the [Trade and Cooperation Agreement](#) (TCA) on December 24, 2020, and trade between the two remains tariff free, albeit subject to increased paperwork due to the UK's departure from the EU's customs union and single market. Post-Brexit trade has been disrupted by non-tariff barriers in the form of additional paperwork and delays at EU borders. There has also been a shift in trade from the UK to the EU as the UK no longer has a role as gateway to EU markets. The UK has regained powers to set maximum residue levels (MRLs) for imports and approve chemicals for use in UK crops. The UK will not be pursuing the same MRL review process as the EU and will set up a review mechanism in approximately two years. There will only be a change to existing MRLs and import tolerances where there is evidence of a public health risk.

On March 30, the Department for Environment, Food and Rural Affairs (Defra) announced some policy changes intended to assist farmers with the availability of fertilizers and reduce costs. The changes include a delay to the introduction of restrictions on the use of urea fertilizer by at least one year. Restrictions on urea fertilizer were included in a 2021 [consultation](#), the purpose of the restrictions was to reduce ammonia pollution through a ban on urea use. The government has not formally responded to the consultation but has confirmed that after the delay the restrictions will include a requirement for ammonia inhibitors instead of a complete urea ban. Defra has also published [revised statutory guidance](#) on how farmers should limit the use of slurry and other farmyard manure at certain times of year. The aim of the guidance is to provide clarity to farmers on how they can use slurry and other manures during autumn and winter to meet agronomic needs. Farmers will be further supported through [new slurry storage grants](#), the grant is intended to help deliver the Farming Rules for Water and reduce dependence on artificial fertilizers by storing more organic nutrients on farm. Alongside these measures, further details of the [Sustainable Farming Incentive](#) have also been published.

The government interventions on fertilizers reflect Defra's position that the priority must be to pioneer new technologies to manufacture more organic-based fertilizer products, and rediscover techniques such as using nitrogen fixing legumes and clovers as an alternative to fertilizer. This position is a continuation of post-Brexit agricultural policy and there is no indication at this time from Defra that the war in Ukraine will result in a reversal in this policy position, or any other agricultural policies.

#### **Attachments:**

No Attachments