UkrAgroConsult

Oilseed Production and Export Forecast in Ukraine

Sergey Feofilov
UkrAgroConsult

April 20, 2022 – Kyiv

blackseagrain

AgriSupp
SUPPORTING DECISIONS

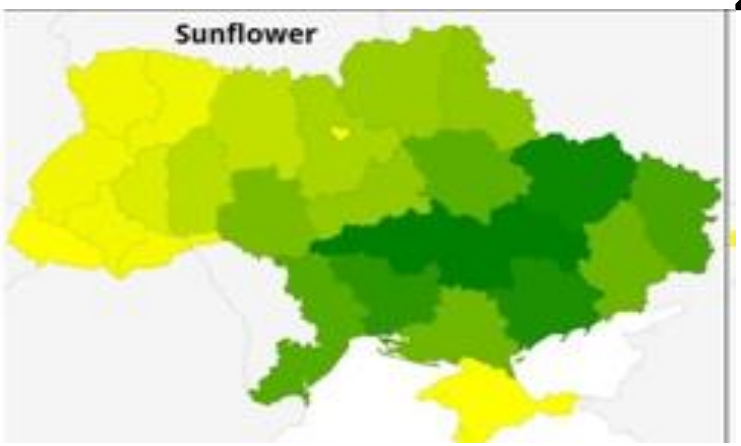
blackseaVEG oil
TRADE

Disclaimer

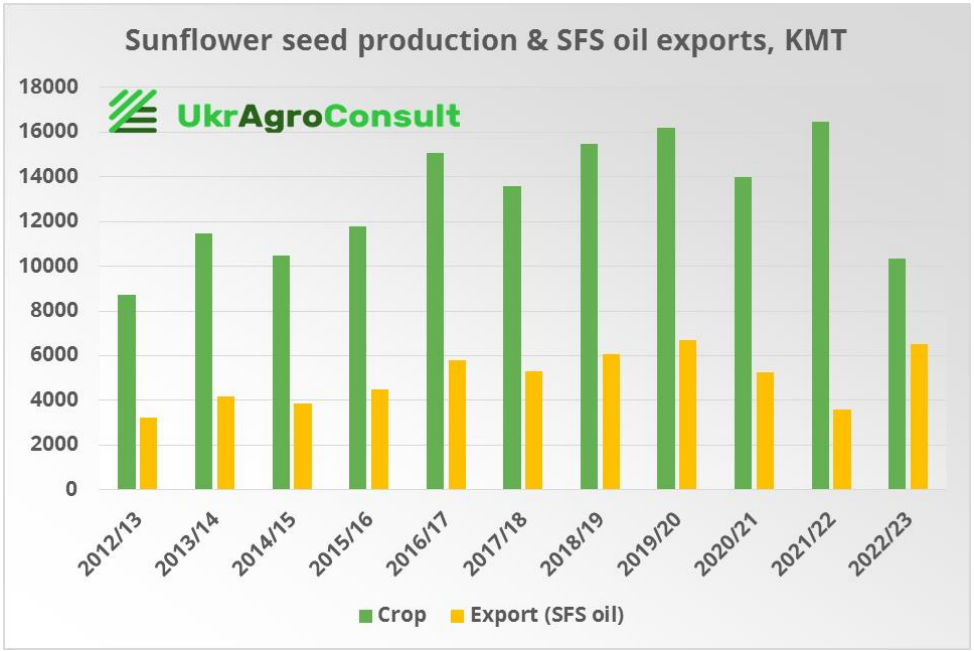
Past performance is no guarantee of future results.

The opinions expressed in this presentation are the opinions of the writer and do not represent the official position of UkrAgroConsult.

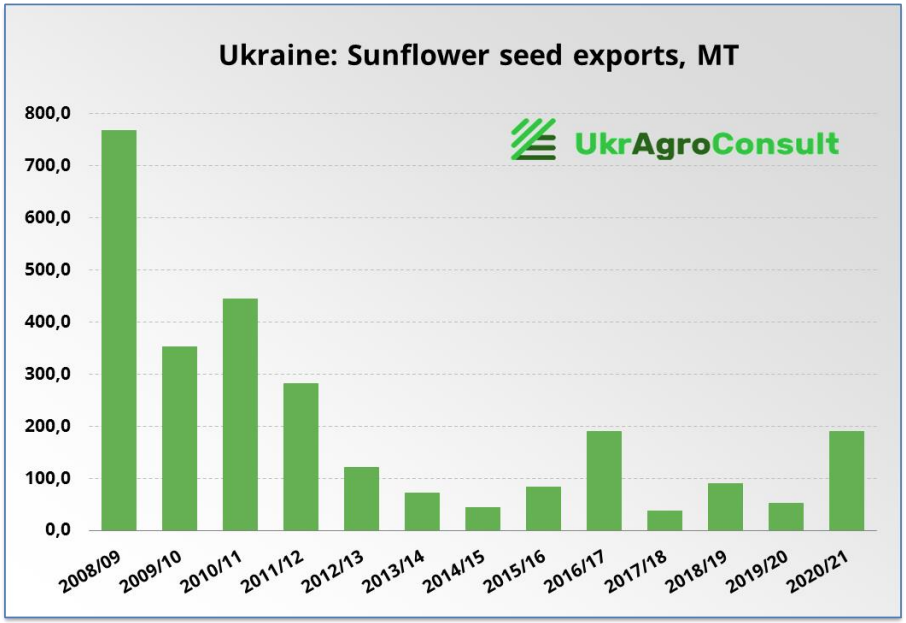
Sunflower production in Ukraine in MY 2022/23

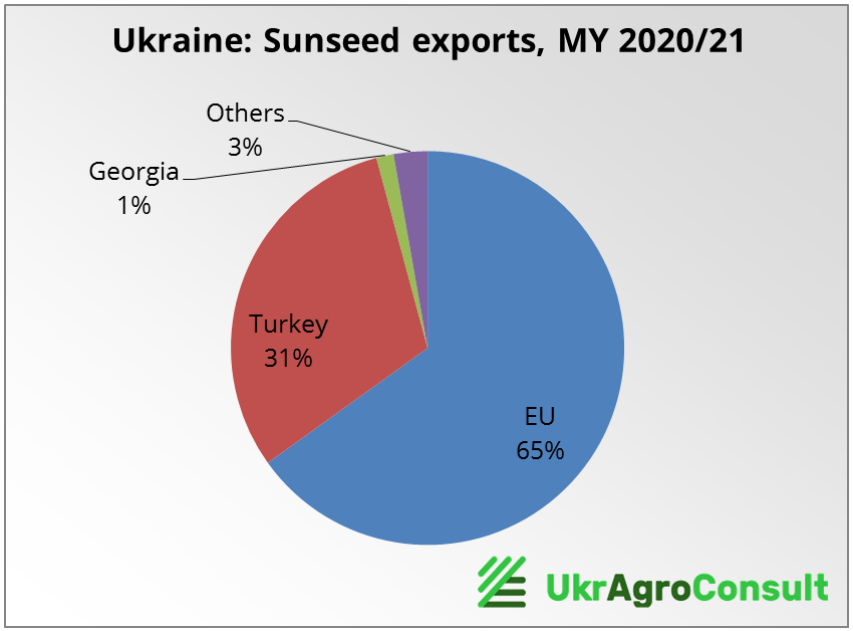


Sunflower	2021/22	2022/23
Area. Th. ha	6750	4400
Yield. mt/ha	2.46	2.38
Crop. KMT	16482	10353
Export (SFS oil). KMT	3600	6500

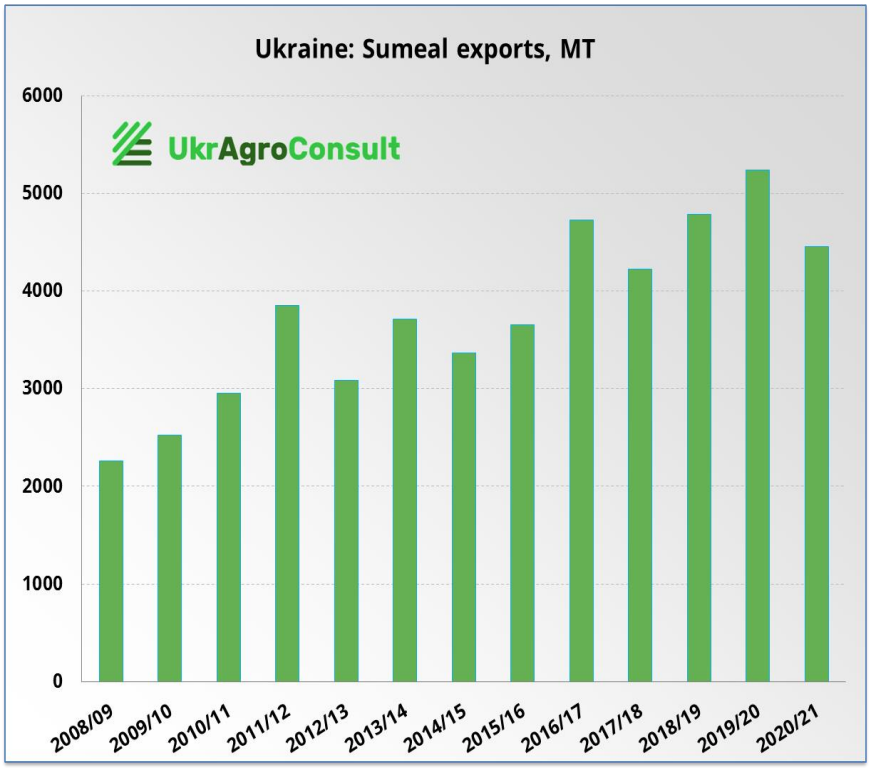


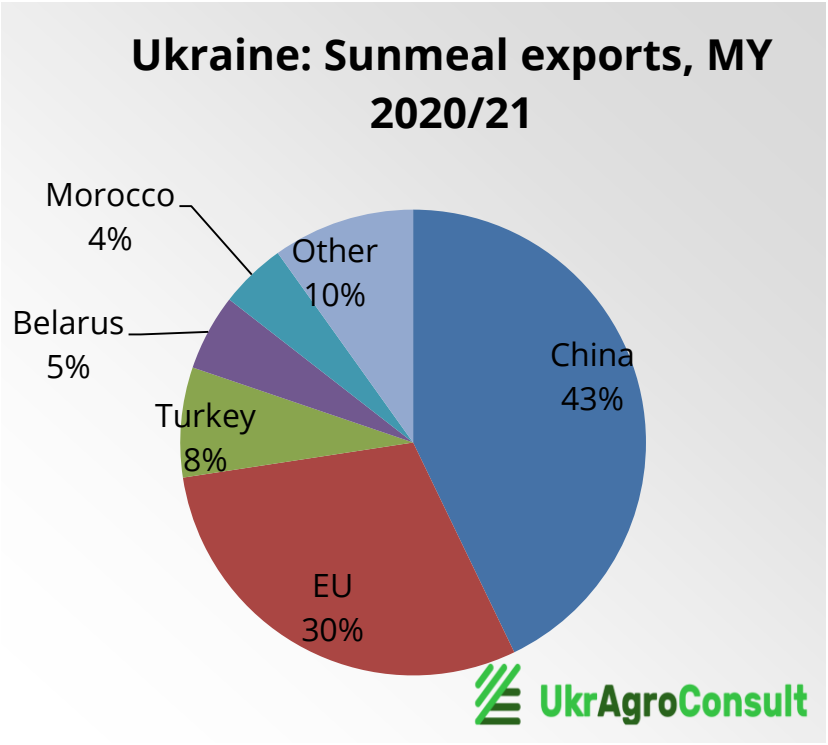
Ukraine. Sunflower Export 2020/21



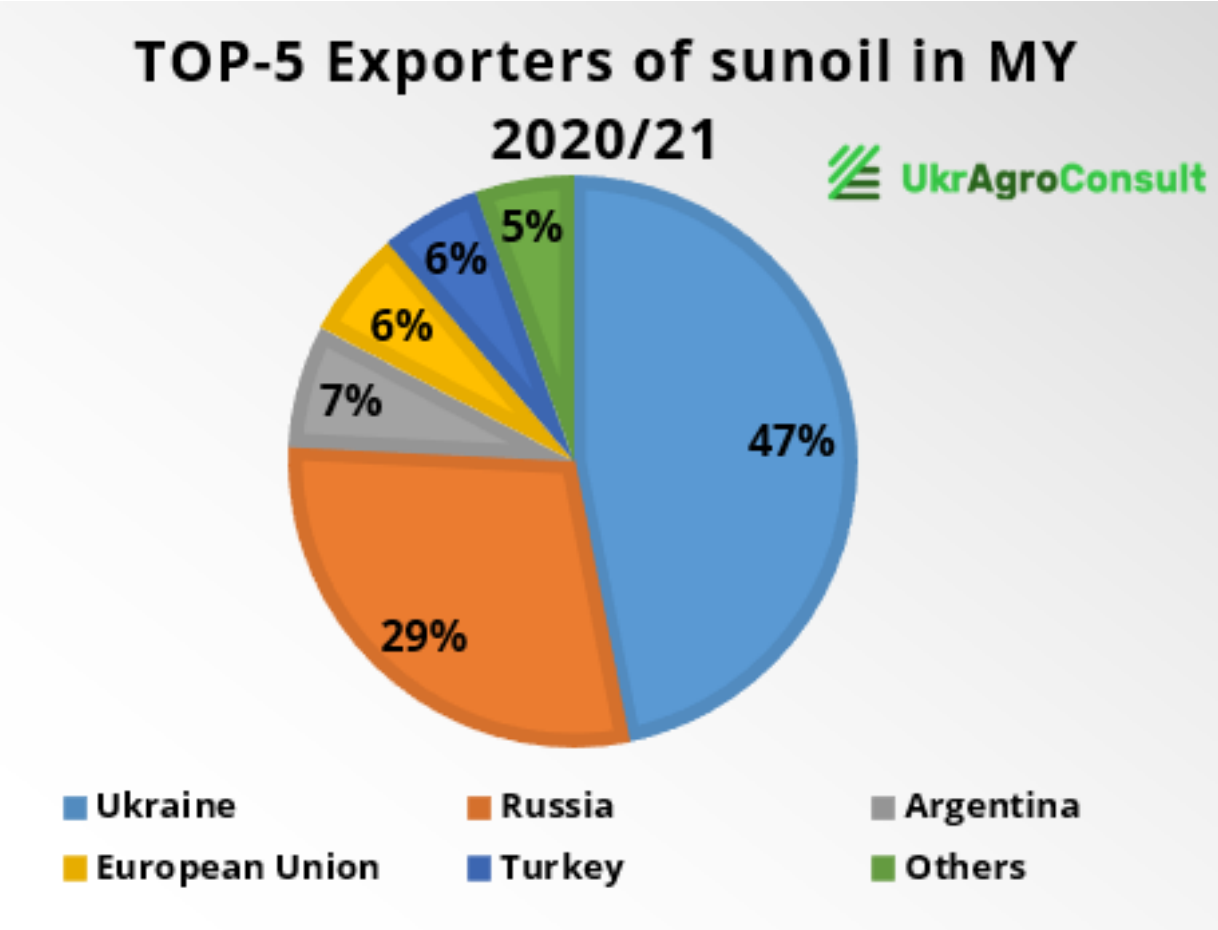


Ukraine. Sunflower Meal Export MY 2020/21

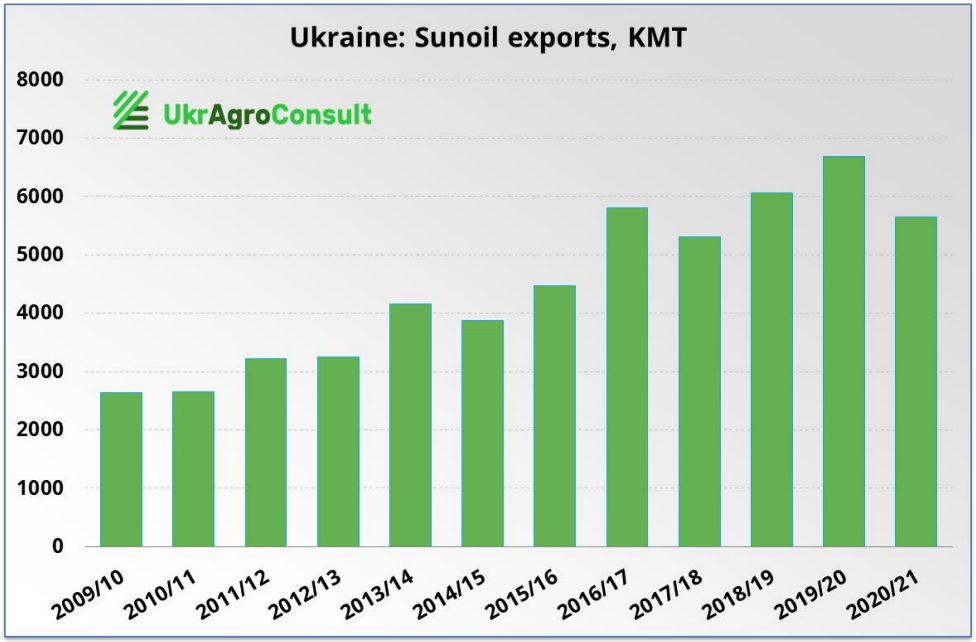


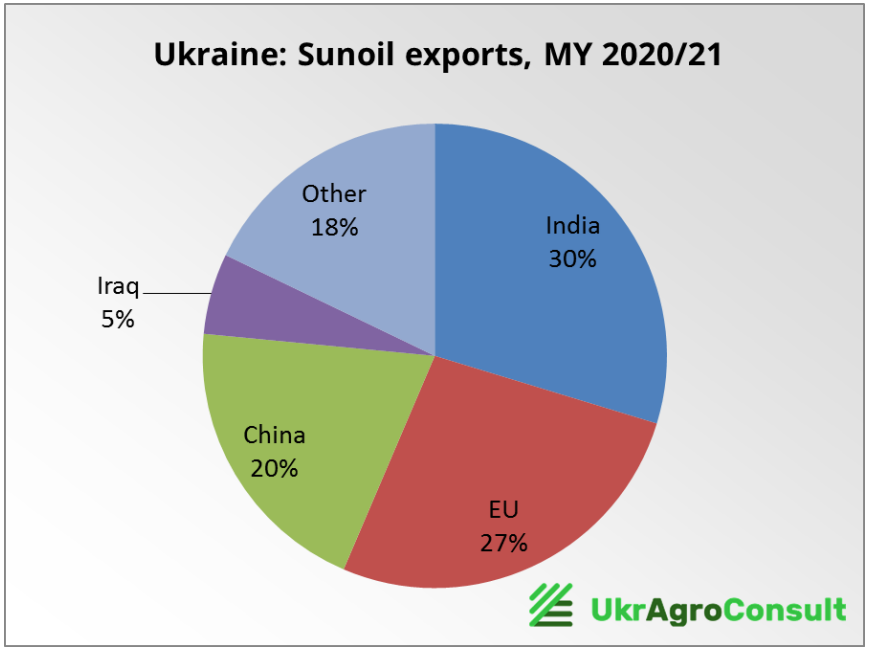


Ukrainian sunflower oil at the global market

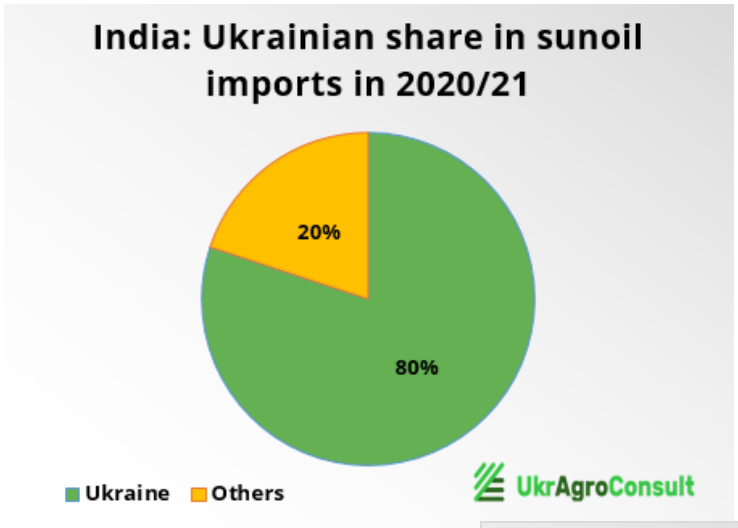


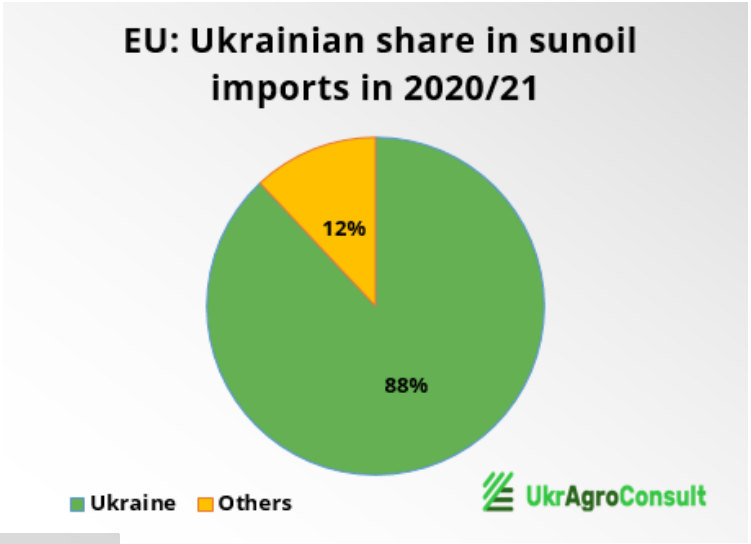
Ukrainian sunflower oil export total and by destination

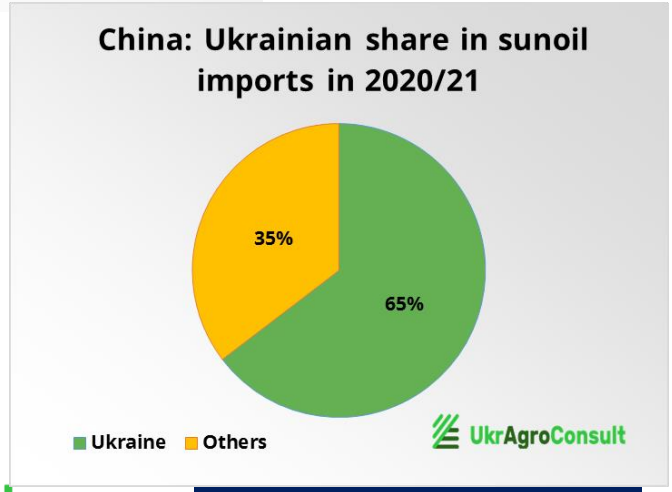




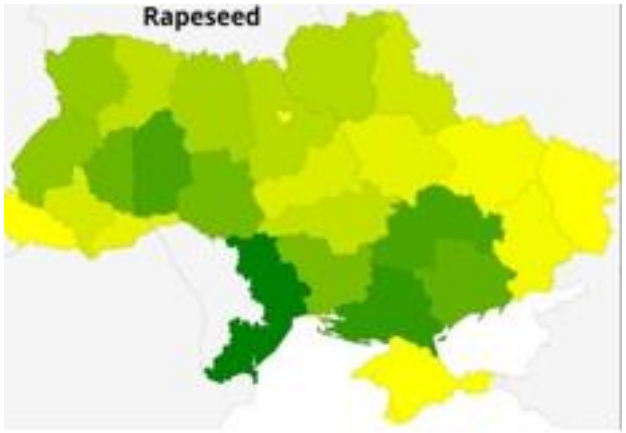
Ukrainian sunflower oil at the global market



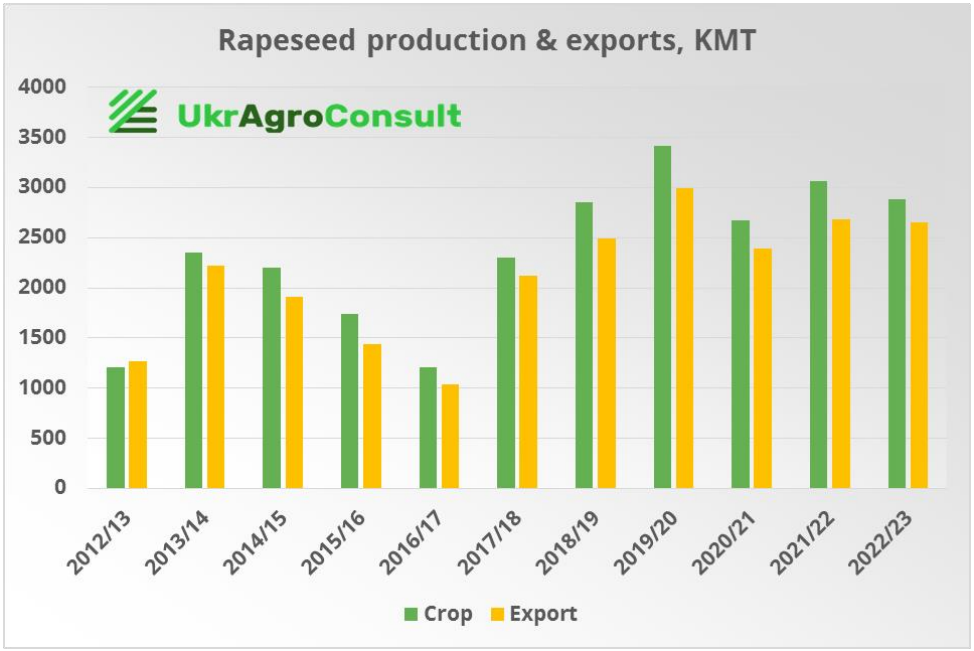




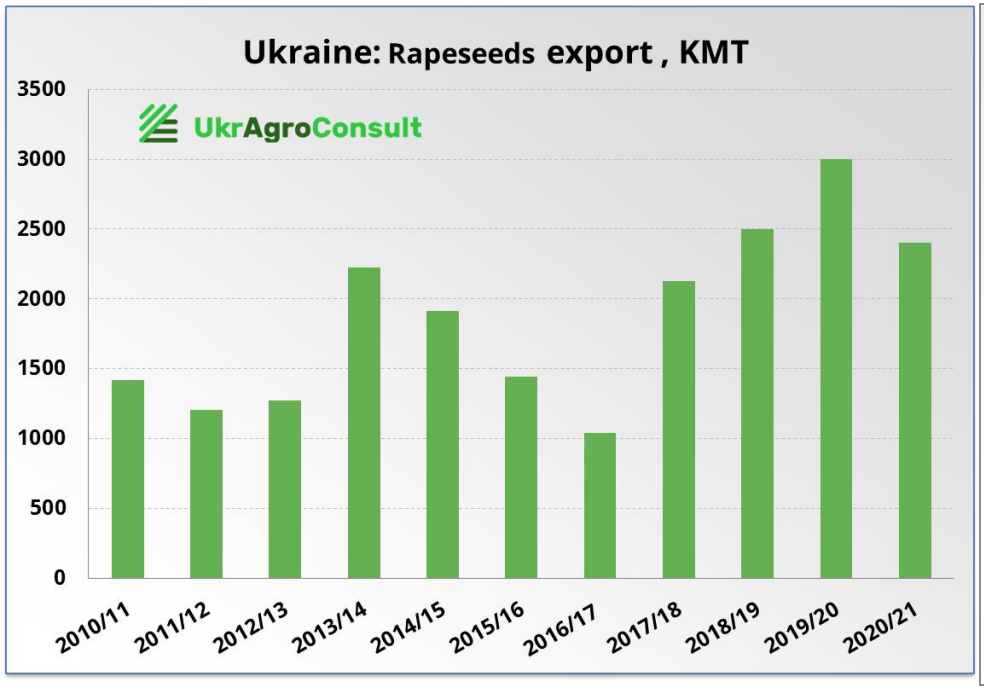
Rapeseed production in Ukraine in MY 2022/23



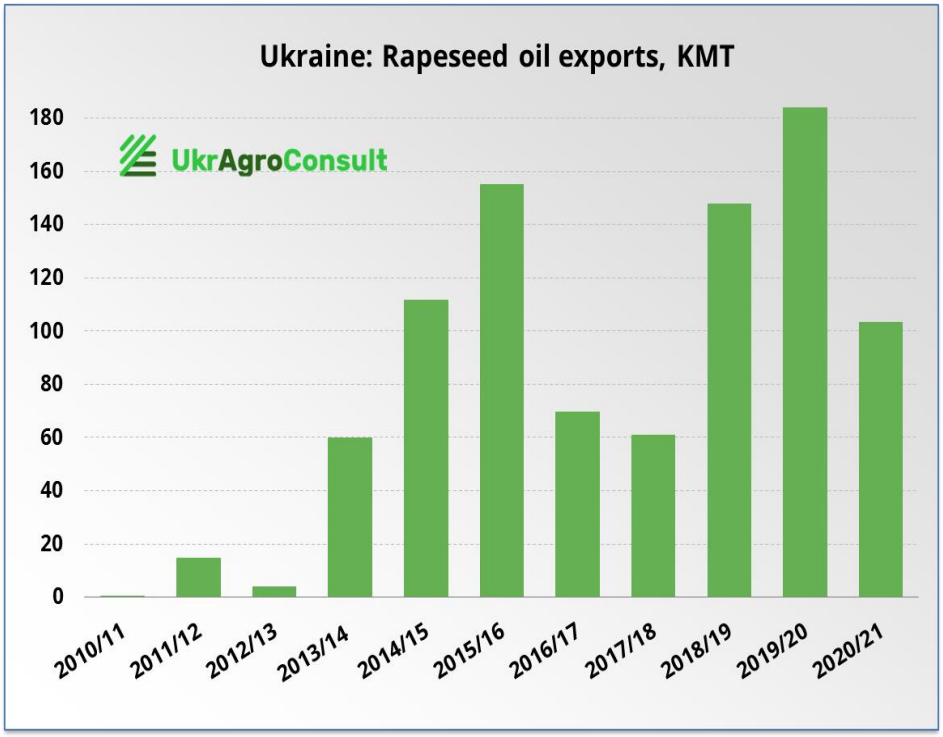
Rapeseed	2021/22	2022/23
Area. Th. ha	1155	1100
Yield. mt/ha	2.92	2.62
Crop. KMT	3066	2882
Export. KMT	2685	2650

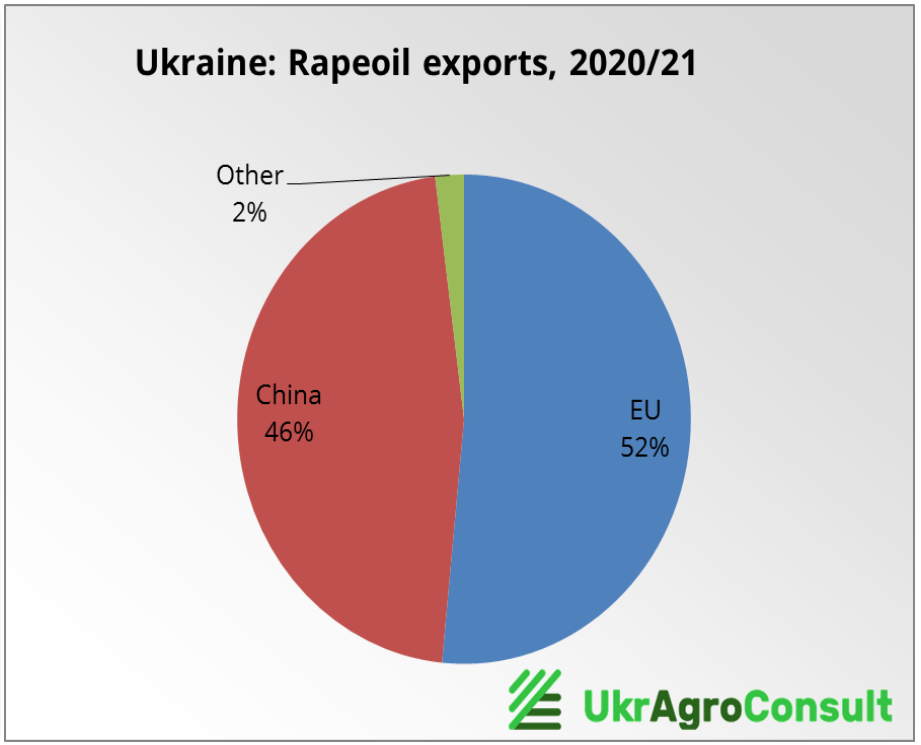


Rapeseed Export, Ukraine MY 2020/21

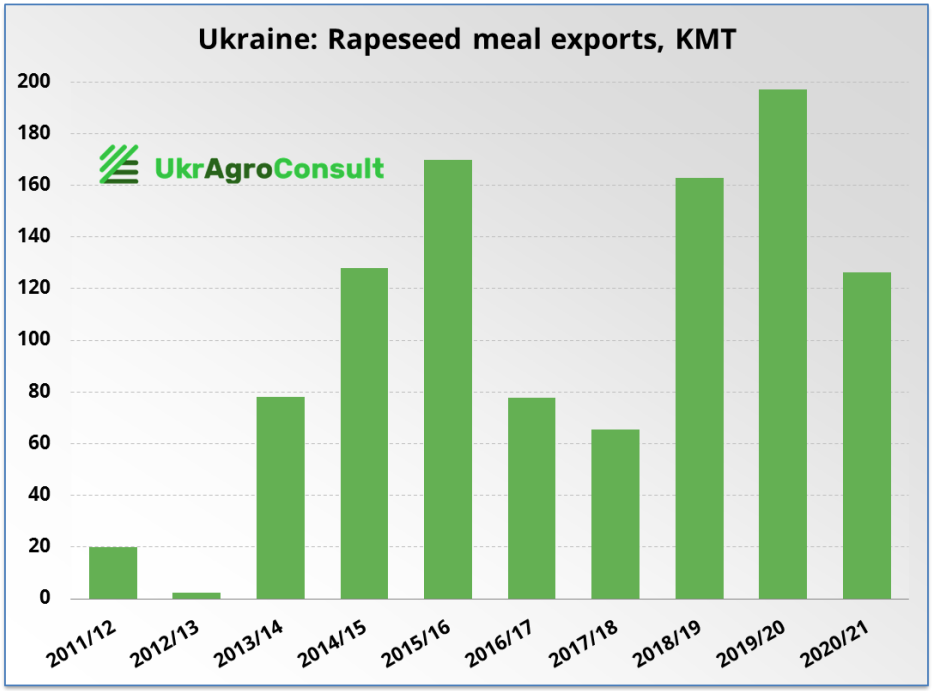


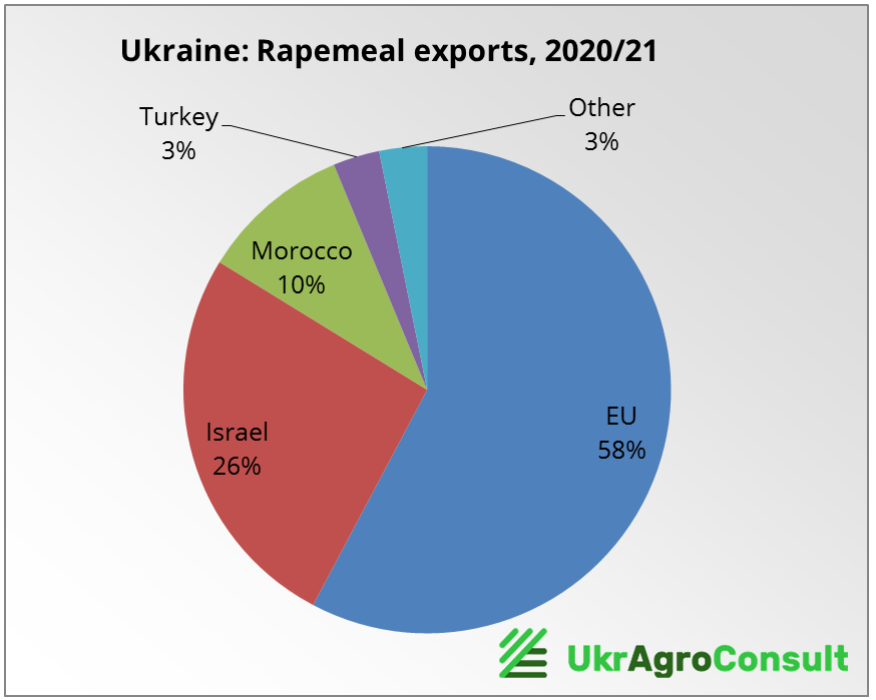
Rapeseed Oil Export, Ukraine, MY 2020/21



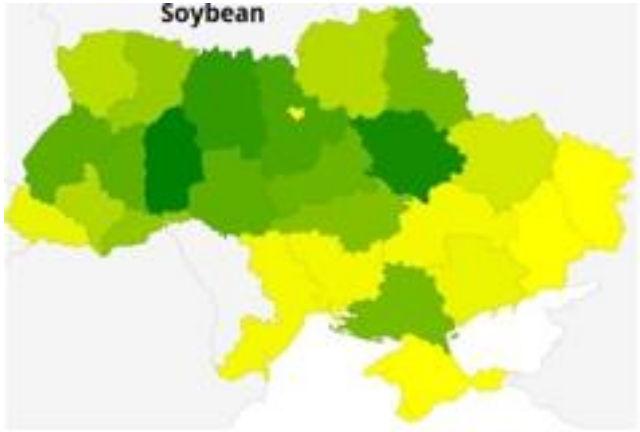


Rapeseed Meal Export, Ukraine, MY 2020/21

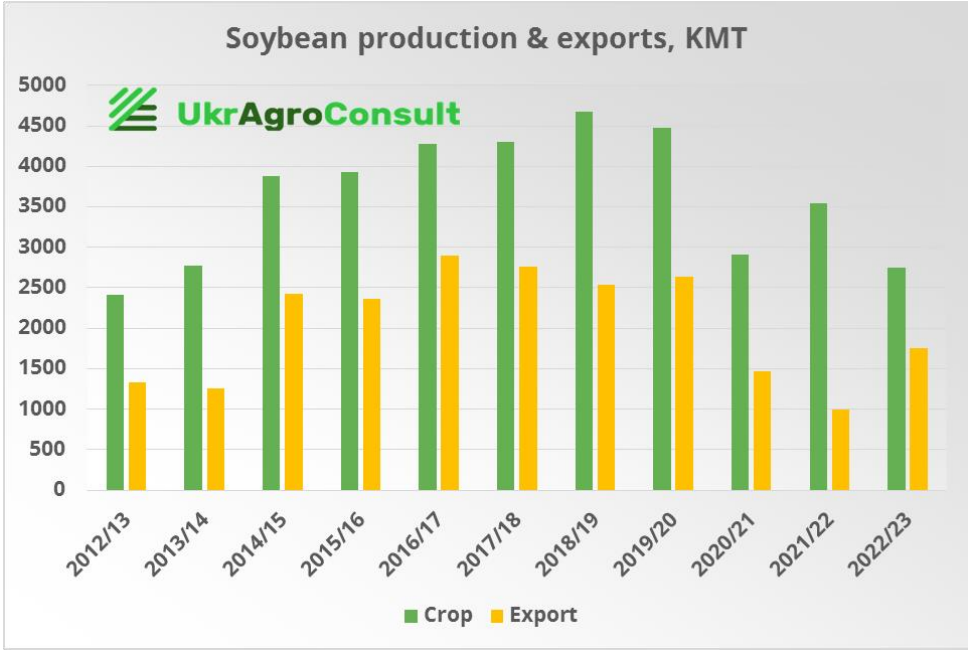




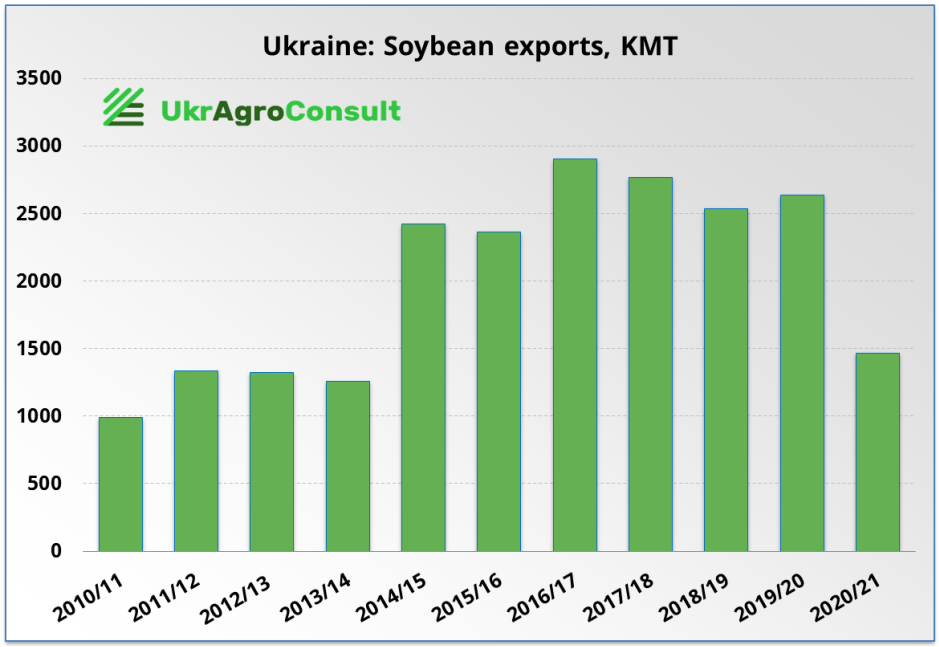
Soybean production in Ukraine in MY 2022/23

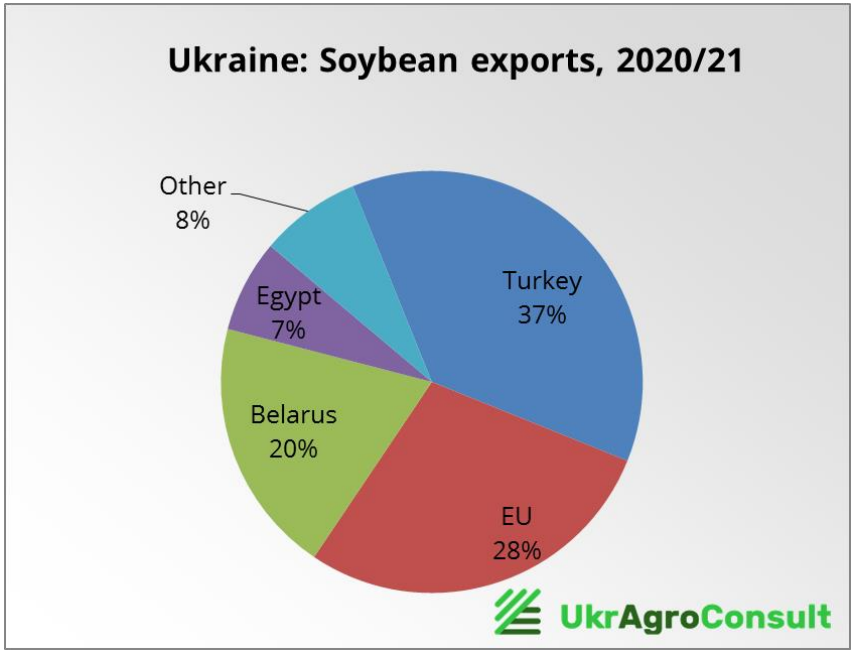


Soybean	2021/22	2022/23
Area. Th. ha	1350	1200
Yield. mt/ha	2.68	2.45
Crop. KMT	3538	2867
Export. KMT	1000	2000

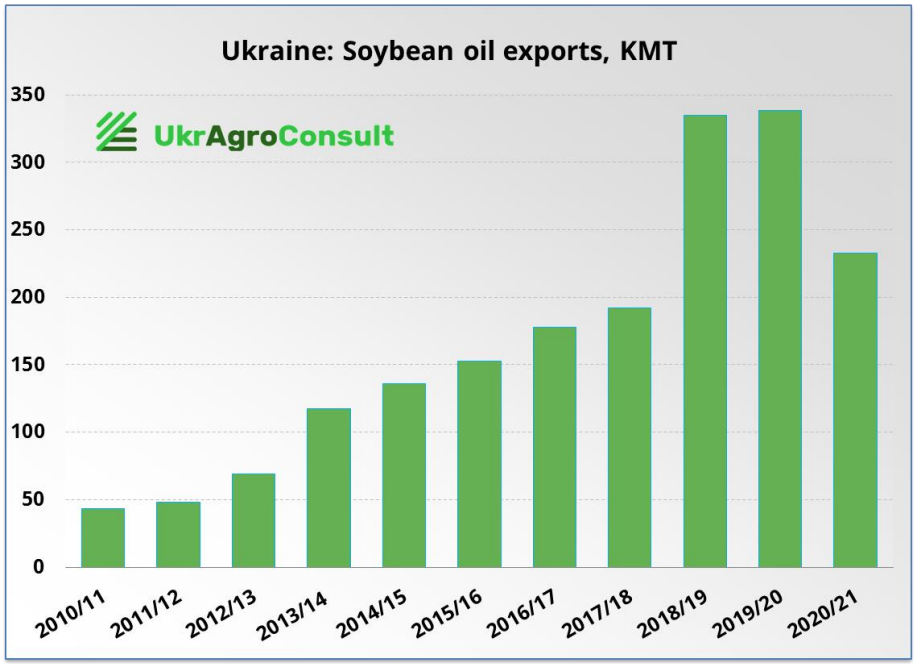


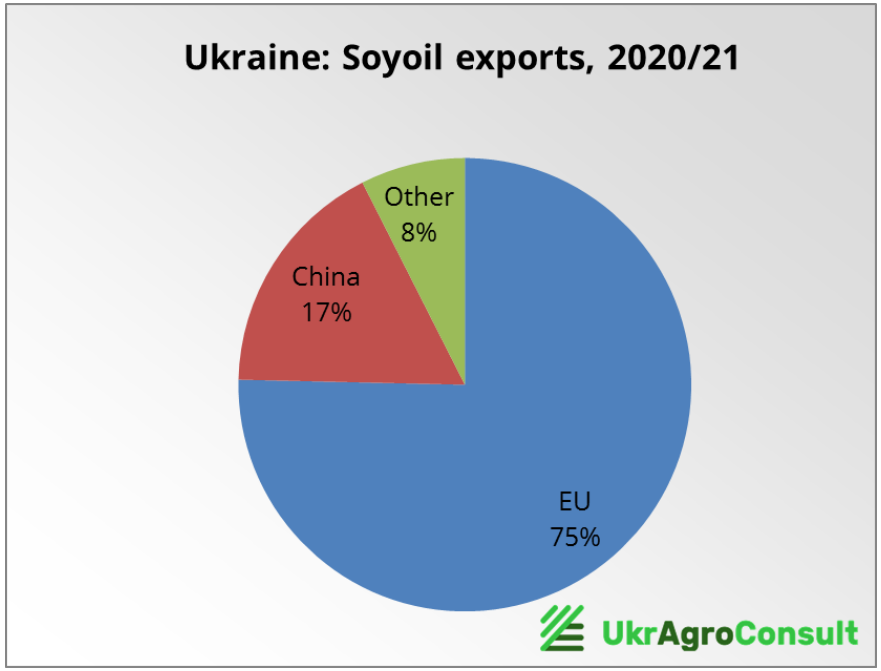
Soybean Exports, Ukraine, MY 2020/21



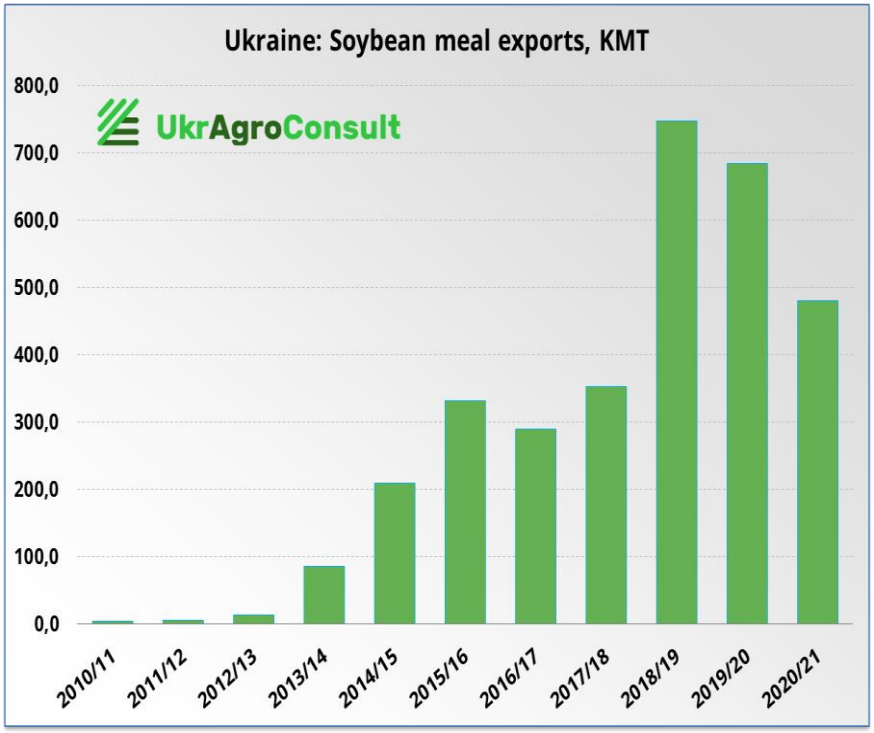


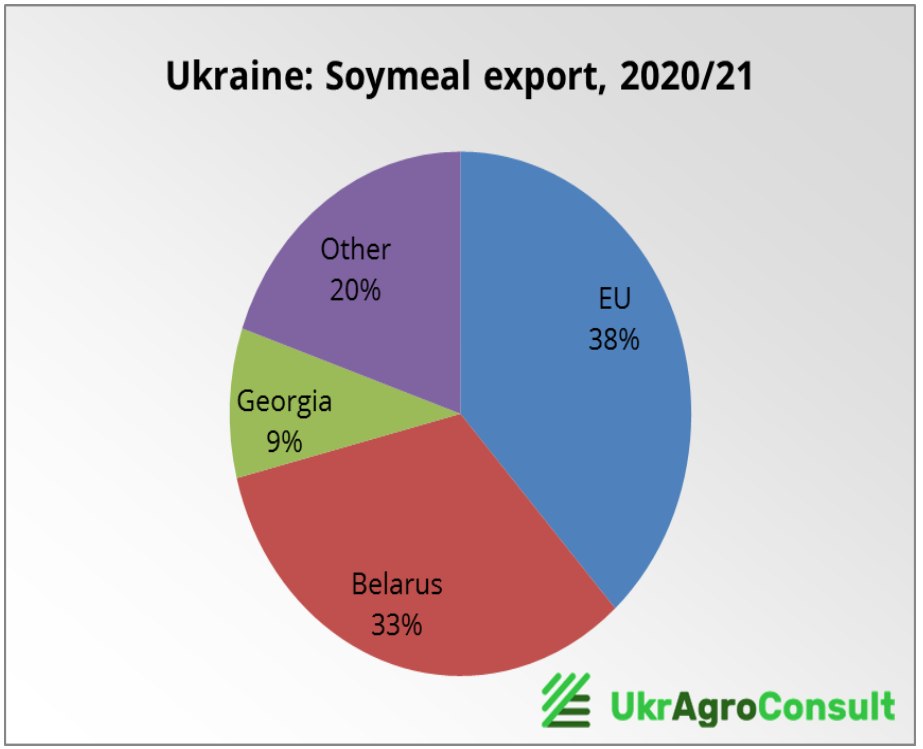
Soy Oil Exports, Ukraine, MY 2020/21





Soy Meal Exports, Ukraine, MY 2020/21



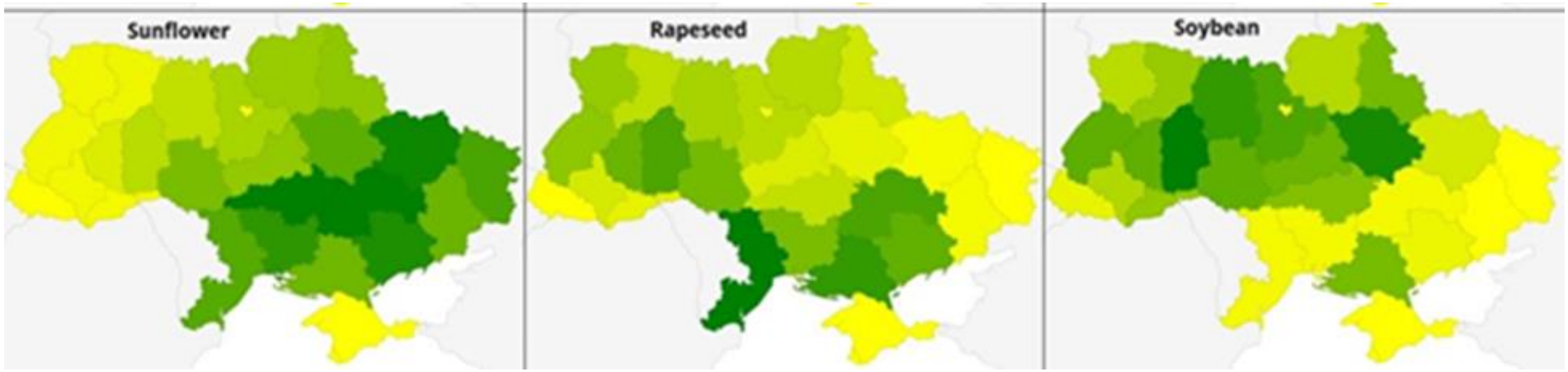


Oilseed production in Ukraine, 2022

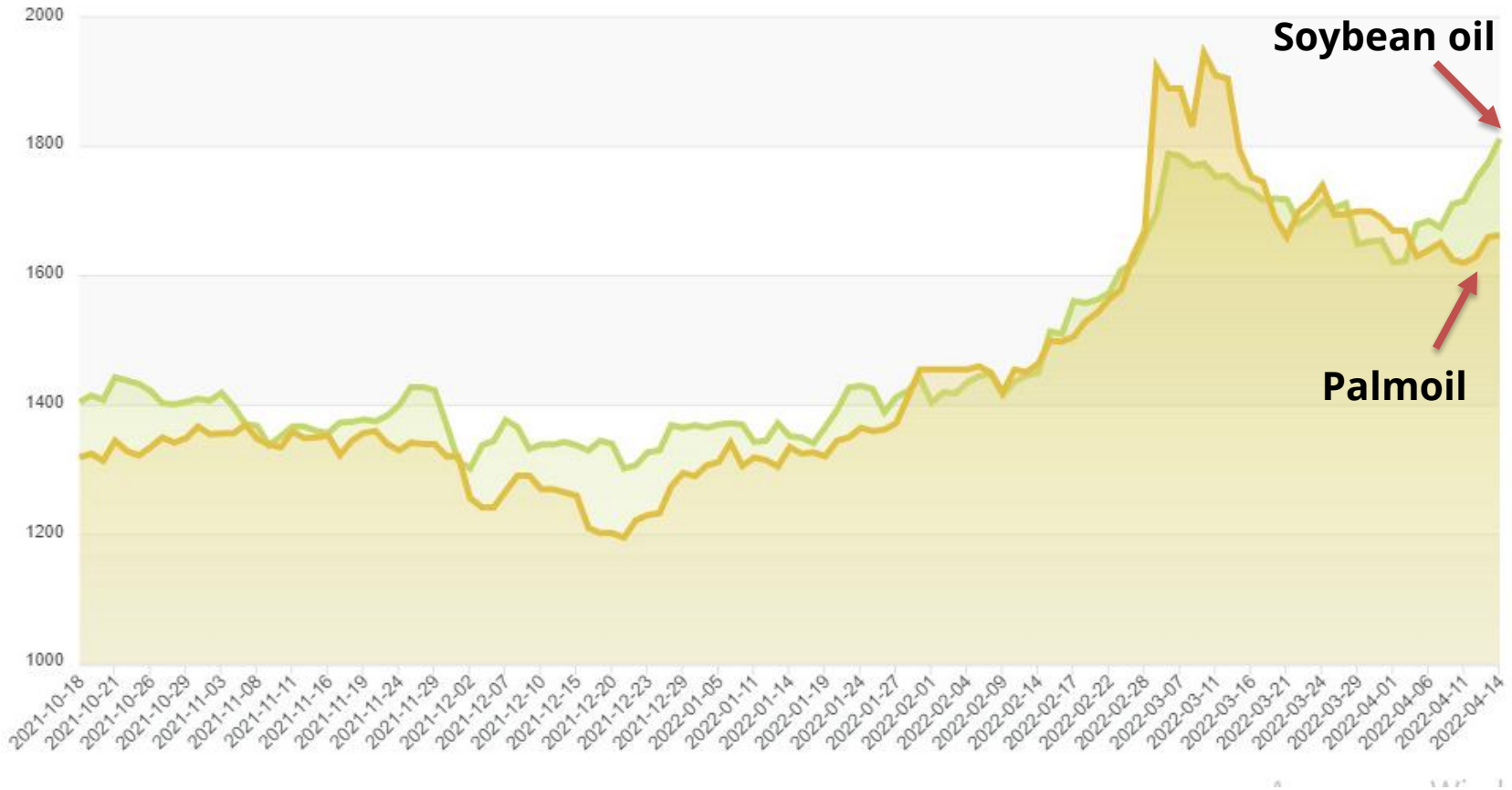
UkrAgroConsult forecast April 6 2022

Crop	2021 K ha	2022 optimistic K ha	2022 pessimistic K ha	2022 avg/basic K ha	Yield t/ha	Crop aver.S. M t
SFS	6750	4800	4200	4400	2.38	10.5
Soy	1350	1300	1100	1200	2.45	2.9
Rape	1155	1200	900	1100	2.62	2.9

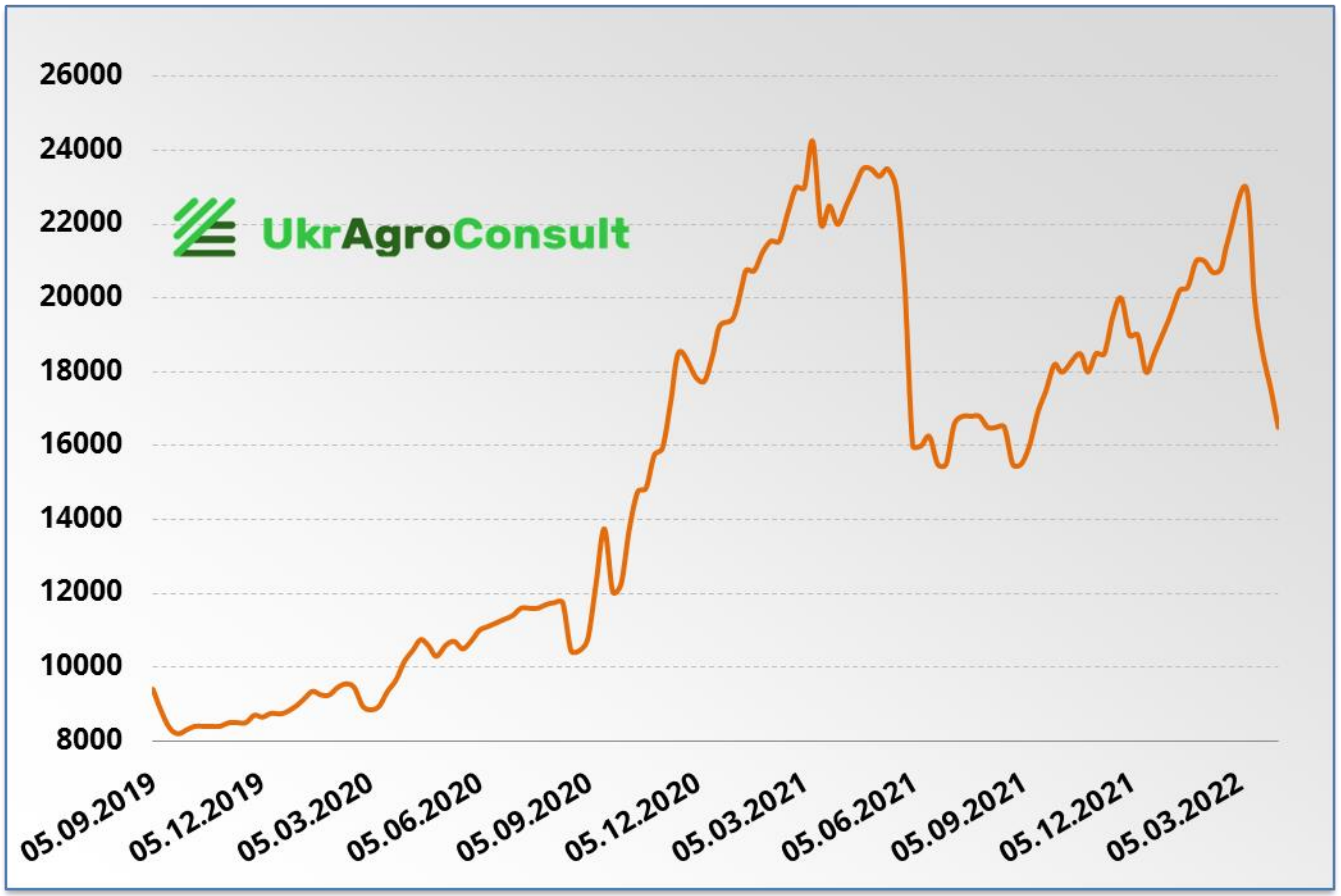
Main crops sowing areas in Ukraine in 2021



Global Markets VegOils prices



Ukraine: Domestic sunseed prices, EXW, UAH/MT



Oil & oilseed export, season 2021/22

Crop. KMT	Export potential	Sep-Feb	Mar	Apr-Aug*	Exportable stocks *
Sunflower	150	44	15	51	40
Sunflower oil	7000	2941	106	553	3400
Soybean	1800	801	37	162	800
Rapeseed**	2685	2648	7	30	-

*UkrAgroConsult estimate
** Jul-Jun

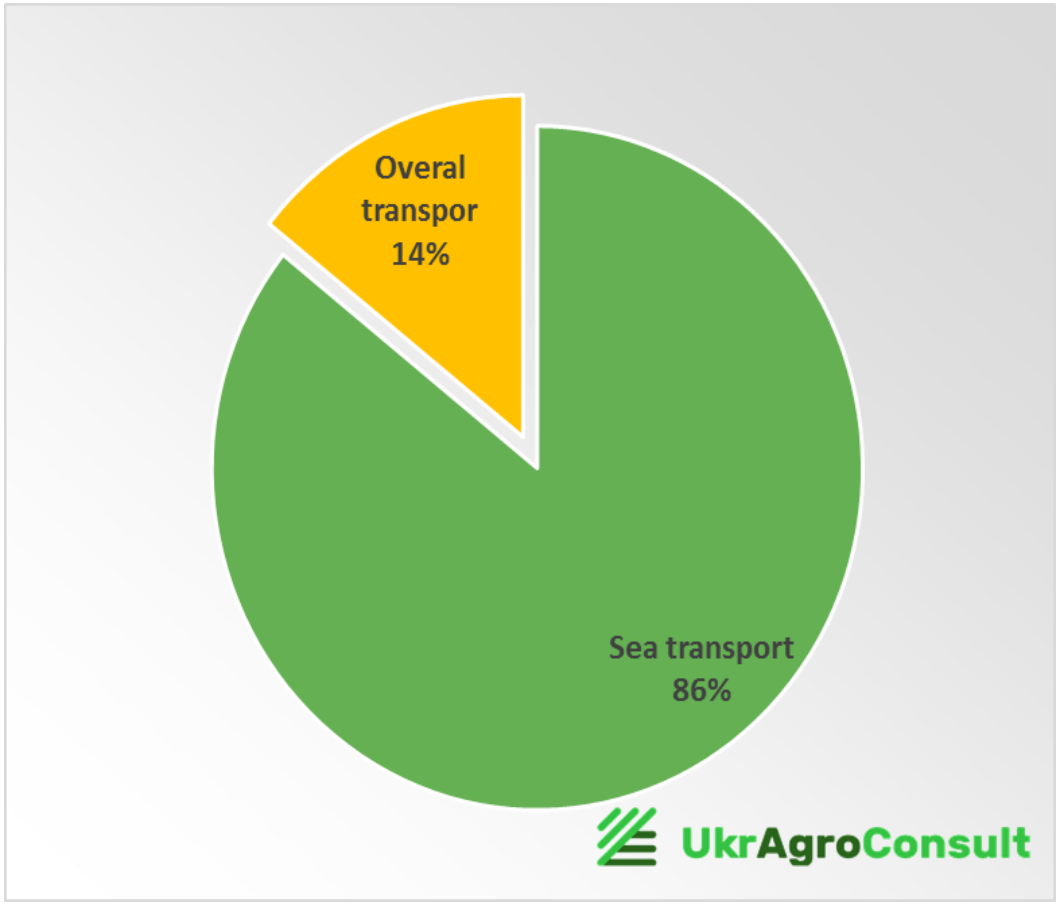
Sowing campaign, April 11, AgMinistry

Crop	Planned area. Th. ha	Planted area. 2022. Th. ha	Planted area. 2021. Th. ha
Spring rapeseed	23.9	12.9	-
Sunflower	4811.0	249.6	390.1
Soybeans	1041.4	18.0	6.2

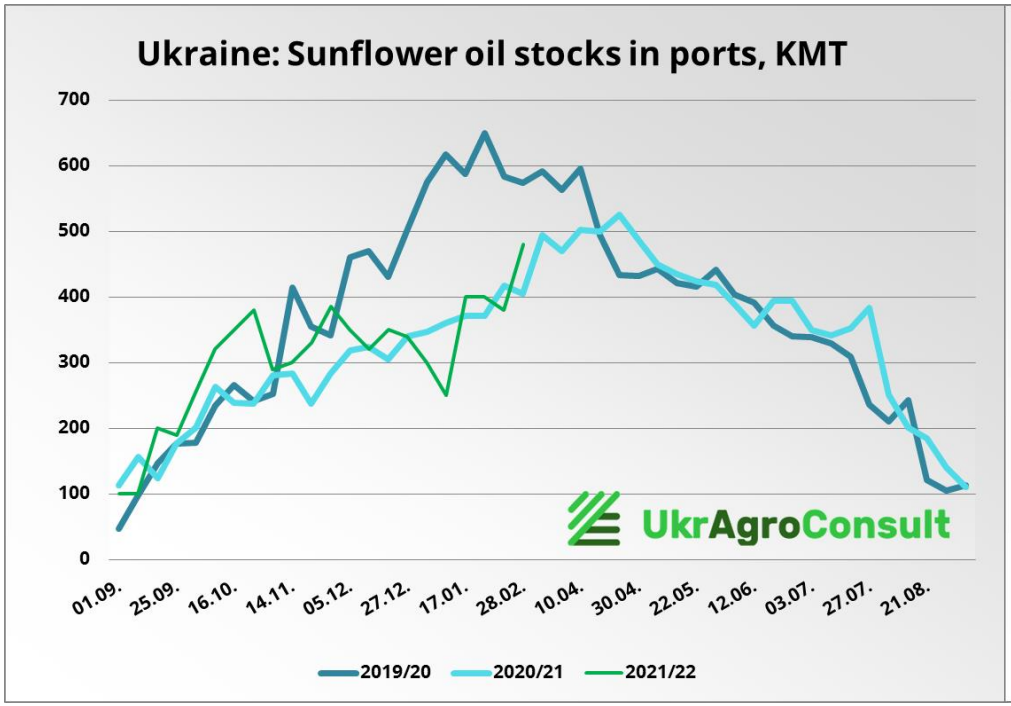
Key factors affecting planted areas and yields of 2022 harvest

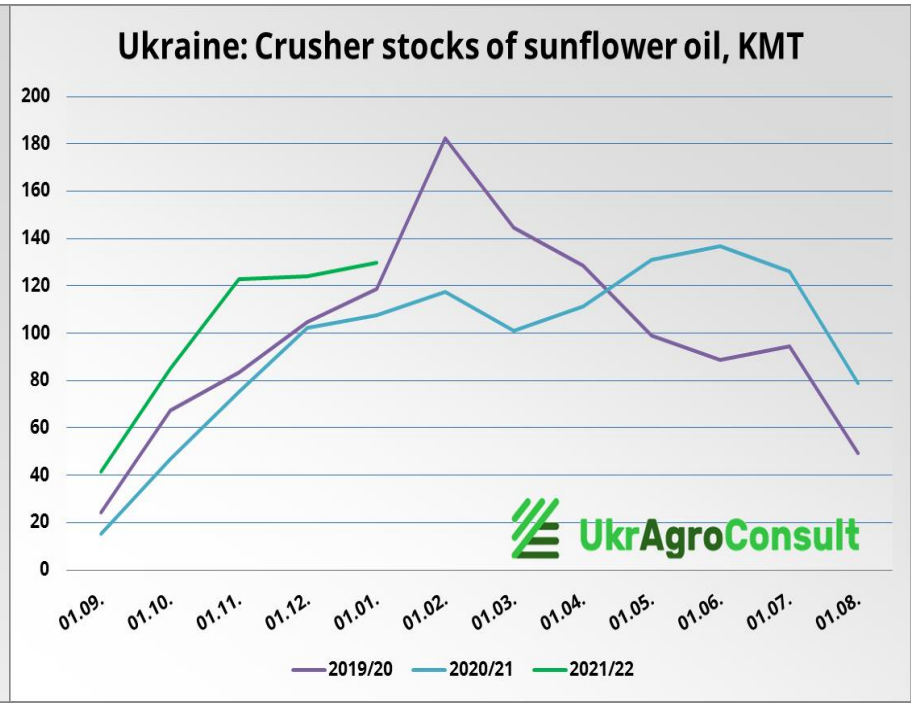
1. Limited access to financing (many farmers hoped to receive funds to finance the sowing campaign after the sale of their grain and oilseeds stocks);
2. Inputs deficit for spring field work (estimated by the Ministry of Agriculture):
   - 2.1. Seeds - 30%.
   - 2.2. Fertilizers - 20%.
   - 2.3. PPP - 50%.
   - 2.4. Fuel - 50%;
3. Deficit of skilled personnel;
4. Damages to agricultural equipment. elevators. warehouses. enterprises;
5. Logistics disruptions. Closure of seaports (export throughput capacity dropped by 6-8 times).

Ukraine. VegOils export by transport mode. 20/21



Ukrainian sunflower oil stocks/exports

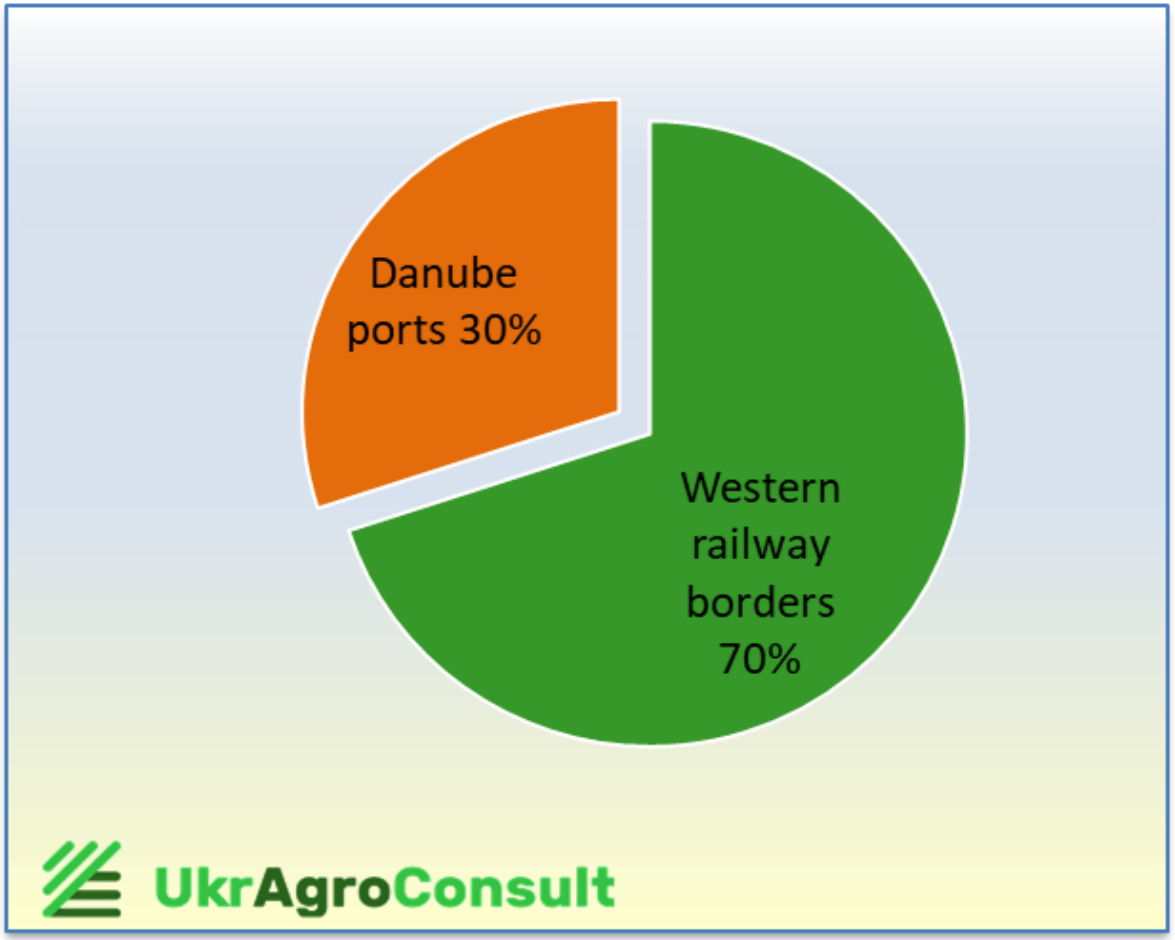




Only two Ukrainian ports now work for export

Teminal	Storage capacity, KMT
Izmail elevator	27
Trans-Expo	18
Dunai Prom Agro	12
Agro-Reni	23
Reni-line	20
Reni elevator	30

Export routes from Ukraine during of a blockade of seaports



Ukraine: Odessa - Constanza container route

TIS Container Terminal Port Pivdenny (Yuzhnyi) Ukraine

Improve your trade and business strategy with [Black Sea Grain & Oilseed Market Reports]

UkrAgroConsult

Thank you!

SUBSCRIBE TO UkrAgroConsult

call: +38044 364 5585
www.ukragroconsult.com
Uac-info@ukragroconsult.org