

UKRAINE OILSEED IN 2026/27: SOWING DECISIONS ARE SHIFTING TOWARDS MARGIN AND PROCESSING

- **High price makes sunflower an attractive option for farmers**
- **Current weather is favourable for spring crops**
- **Processing capacity loading is expected to increase in the new 2026/27 season**
- **Soybean and rapeseed processing is likely to reach record levels in 2025/26**

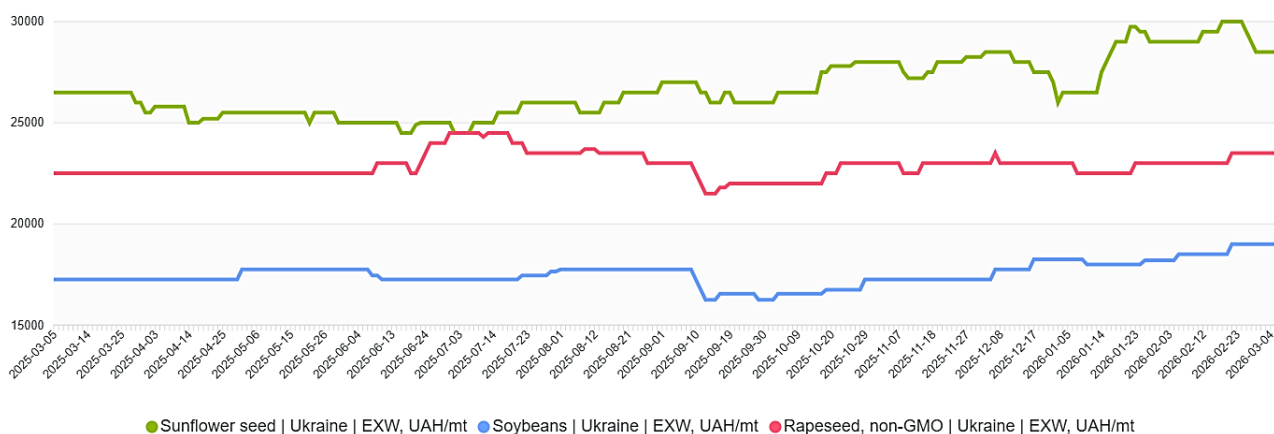
Ukraine aims to achieve a high oilseed harvest in the 2026/27 season. The spring 2026 planting is approaching. At this moment the most important decision for farmers is land distribution by crop. As usually, these decisions are driven primarily by expected margins rather than other considerations.

Large agricultural holdings have already finalised their land structure. They secured seed stocks in advance and, thanks to diversified crop portfolios, can make decisions with relatively lower risk.

Smaller farms are still adjusting their plans according to current market conditions. Rising fertilisers and fuel costs, uneven access to inputs and uncertainty in export markets may significantly influence their final planting decisions. Finally, the national area statistics will likely report about these differences between large integrated producers and smaller farms that remain more sensitive to short-term market signals.

Sunflower

Among oilseed crops SFS continues to dominate farmer attention because of strong prices after the deficit season. At the beginning of 2026 domestic SFS prices were at the psychological level of about 30,000 UAH/mt (roughly €720/mt). This price level keeps SFS one of the most profitable crops in the current 2025/26 season.



Source: AgriSupp data base

The next 2026/27 season outlook suggests a recovery after last season's tight supply:

- SFS areas may expand to about 6.1 M ha (+3% vs. 2025/26)
- yield potential is improving as winter precipitation replenished soil moisture
- production could increase to around 13.7 M mt, the highest level in the last three years
- crushing volumes may grow as export licensing limits raw seed shipments to five EU countries
- exports of sunflower oil and meal are expected to expand, with the EU remaining a key destination, India strategically important for oil and China for meal.

The market continues to follow the traditional Ukrainian model for the oilseed sector: Higher seed production leads to increased crushing, which in turn leads to greater exports of processed products.

Ukraine, SFS S&D, March 2026

Sunseed	2026/27		2025/26	
	FEB	MAR	FEB	MAR
Opening stocks	139	139	356	356
Area seeded, Th ha	6000	6100	5900	5900
Area harvested, Th ha	5950	6050	5650	5650
Yield, MT/ha	2,23	2,26	1,92	1,92
Production	13269	13673	10848	10848
Imports	20	20	20	20
SUPPLY	13428	13832	11224	11224
Crushing	13100	13500	10950	10950
Other uses	30	30	30	30
Seeds	60	60	60	60
Exports	50	50	30	30
Losses	15	15	15	15
DEMAND	13255	13655	11085	11085
Ending stocks	173	177	139	139

Source: UkrAgroConsult

This is quite clear trend of Ukraine shifting from a raw oilseed exporter toward a processing hub within the Black Sea region.

Soybean 2026/27 market appears relatively balanced. Current expectations suggest:

- soybean areas may decline slightly to about 2.3 M ha (-4% y/y);
- improved yields supported by sufficient early-season soil moisture;
- overall production remaining close to last year's level;
- moderate growth in domestic processing following the introduction of soybean export duties in 2025/26;
- stable soybean exports combined with gradual growth in soybean meal and oil exports.

Ukraine. Soybean S&D, March 2026

Soybean	2026/27		2025/26	
	FEB	MAR	FEB	MAR
Opening stocks	101	101	39	39
Area seeded, Th ha	2300	2300	2400	2400
Area harvested, Th ha	2250	2250	2350	2350
Yield, MT/ha	2,53	2,53	2,4	2,4
Production	5693	5693	5640	5640
Imports	2	2	2	2
SUPPLY	5795	5795	5681	5681
Crushing	2800	2800	2700	2700
Other uses	70	70	70	70
Seeds	200	200	200	200
Exports	2600	2600	2600	2600
Losses	10	10	10	10
DEMAND	5680	5680	5580	5580
Ending stocks	115	115	101	101

Source: UkrAgroConsult

In other words, the soybean market maintains a relatively stable balance between seed exports and domestic crushing.

Rapeseed enters the new season with some weather-related risks but overall stable prospects. Autumn planting conditions were affected by low soil moisture, which resulted in a slight reduction in RPS areas. Winter losses are currently estimated at around 5%, with the most damaged fields located in southern and central Ukraine.

The balance outlook for 2026/27 suggests moderate market expansion:

- rapeseed areas may decline slightly to about 1.35 M ha (-2%/y);
- improved yields could lift production to roughly 3.6-3.7 M mt (+10%);
- domestic crushing may reach another record level as rapeseed export duties introduced in 2025/26 stimulate processing;
- exports of rapeseed to the EU remain the main sales channel.

Ukraine. Rapeseed S&D, March 2026

Rapeseed	2026/27		2025/26	
	FEB	MAR	FEB	MAR
Opening stocks	115	52	83	83
Area seeded, Th ha	1350	1350	1380	1380
Area harvested, Th ha	1286	1286	1260	1260
Yield, MT/ha	2,84	2,84	2,68	2,63
Production	3652	3652	3377	3314
Imports	10	10	10	10
SUPPLY	3777	3714	3470	3407
Crushing	1350	1500	1250	1300
Seeds	3	3	3	3
Exports	2300	2100	2100	2050
Losses	2	2	2	2
DEMAND	3655	3605	3355	3355
Ending stocks	122	109	115	52

Source: UkrAgroConsult

Thus, the RPS market key drivers include yield recovery expectations and expanding domestic processing, although seed exports will remain the dominant trade flow.

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