

POLAND RAPESEED MARKET: CRUSHERS ARE HEATING UP THE MARKET WITH NEW INVESTMENTS

- ***Crush capacity is growing faster than oilseed production***
- ***Crush margin is increasingly driven by access to oilseeds***
- ***Prices are moving up alongside supply tension***

Poland's rapeseed market is more uncomfortable. Investors are facing the question what is the value of new crushing capacity if the oilseed supply is deficit.

The imbalance between rapeseed supply and processing capacity in Poland is becoming sharper. Processors are warning more openly about a shortage of oilseed, especially rapeseed, estimated at least of 500 K mt. With new projects still coming, that gap may widen in the next few years

This is why the latest investment wave looks both logical and paradoxical. On one side, Poland does not have enough rapeseed to fully load all existing plants. On the other, companies are still investing in new processing assets because they are betting on the long-term growth of biofuels, food oils, and regional value-added trade. They hope that raw oilseed supply will follow growing demand, either through higher domestic production or through imports.

ORLEN Południe is one of the clearest examples. The company decided to develop biofuel output in a new oilseed processing plant in Kętrzyn of 500 K mt of rapeseed annually to produce around 200 K mt of oil for low-carbon fuels. Earlier ORLEN also advanced its second-generation bioethanol project in southern Poland. This shows that the market is investing to meet future demand for these products.

So Polish processing capacity is about 4 M mt per year, while domestic rapeseed output is in the 3.2–3.8 M mt range. That means stronger competition for oilseed, tighter margins, and a real risk that some processors will have to run below capacity.

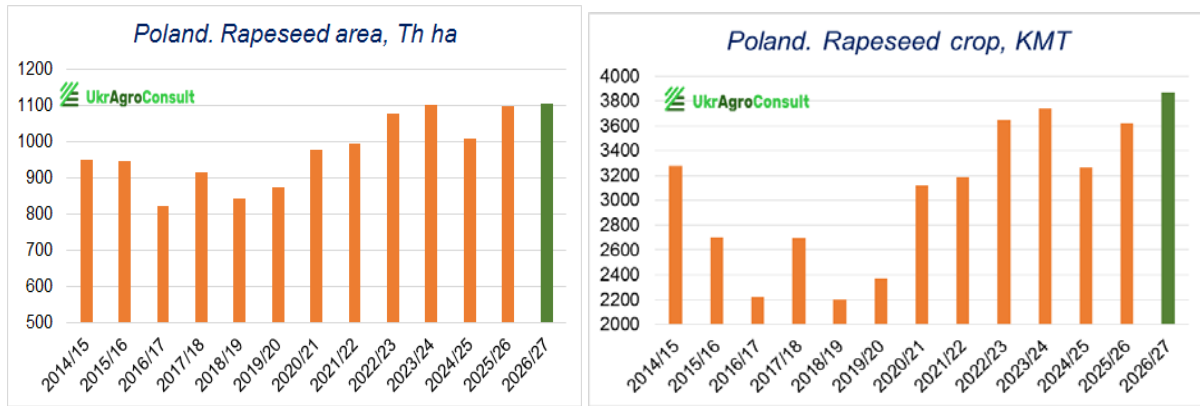
The demand for oilseed is concentrated in large international groups.

- Archer Daniels Midland (ADM Szamotuły)
- Louis Dreyfus Company (Bodaczów)
- Bunge (Kruszwica).

The 2026/27 crop outlook

The basic industry expectation is for better yields, around 3.5 mt/ha, and rapeseed production close to 3.9 M mt. Winter rapeseed generally is in good or satisfactory condition, and field condition is better than last year.

Still, even a record crop would only reduce the gap, not eliminate it. If processing capacity is already around 4 M mt and rising, a 3.9 M mt crop is helpful, but it is not decisive.



Source: Eurostat for 2014-2025 and UkrAgroConsult estimation for 2026/2027

Forward prices for the 2026/27 crop are already reflecting that tension. New-crop rapeseed bids in Poland increased by around PLN 20–30/mt (€4.7-7/mt) w/w, up to PLN 2,055–2,130/mt (€479–497/mt). In early April 2025, new-crop values were PLN 1,970–2,020/mt (€459–471/mt).

The nearby forecast is constructive, but not wildly bullish. In April and May, the market may test PLN 2,150–2,200/mt (€501–513/mt), especially if European oilseed markets continue to support the demand and there is no sharp pressure from new-crop selling. But straight rally is not the most likely. The 2026/27 season looks like a firmer market with shorter corrections and more selective trade.

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