



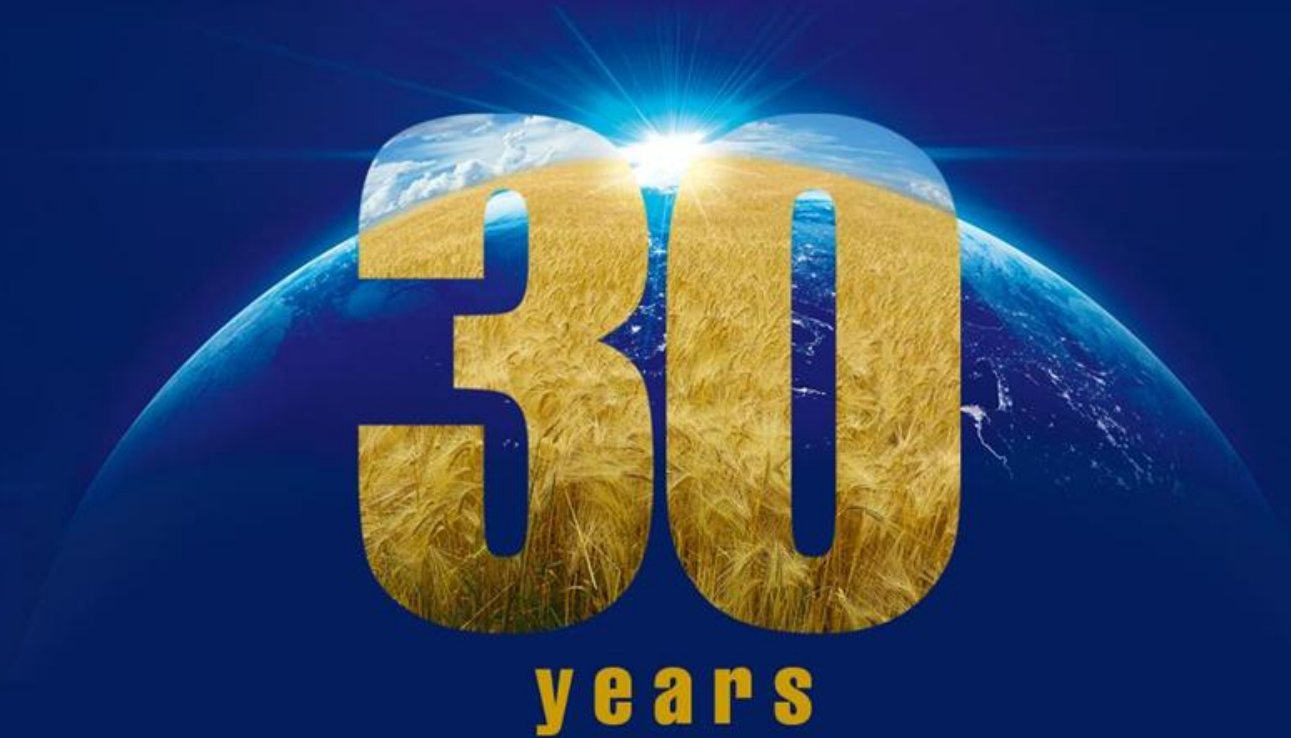
Black Sea & Danube Region at the Heart of Global Challenges: Crop and Export Forecast 2026/27

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 **UkrAgroConsult**



We counsel business that feeds the world



MARKING A MILESTONE

World: Oilseed production



2025/26

54.7



427.4



95.5



Black Sea & Danube region

39.4

72%

15.1

3.5%

17.1

18%

Oilseeds VS. grains

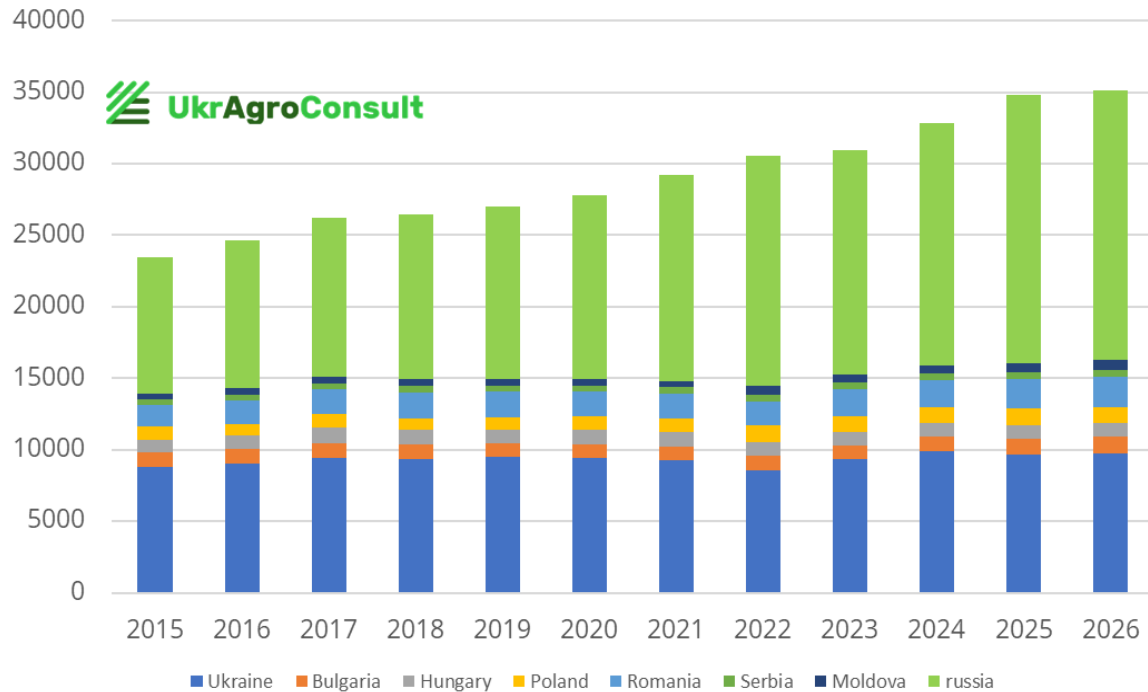
Grains + volume  *Oilseeds + processing*

Advantages of oilseed crops

- higher margin per hectare
- stable export demand (food segment, feed, biofuels)
- a shift toward processing adds value
- lower input intensity (especially soybeans)
- agronomic advantages – better adaptation to climate risks.

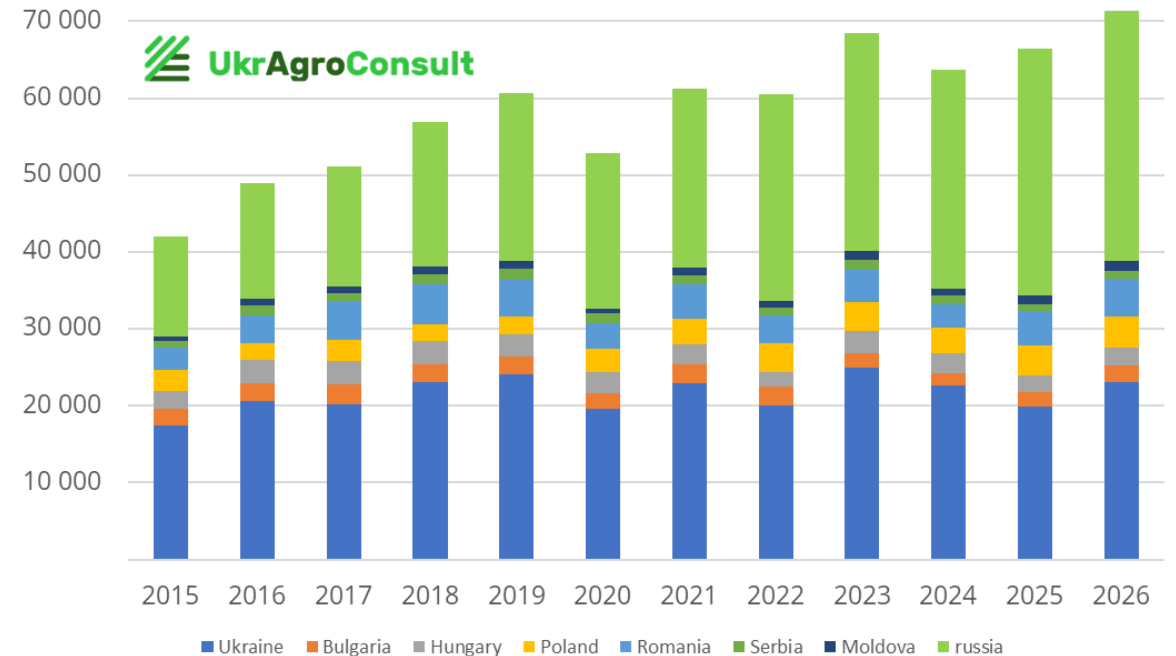
Black Sea & Danube region: Oilseed production

Black Sea&Danube Region: Oilseeds planting, Th ha



+374 Th ha

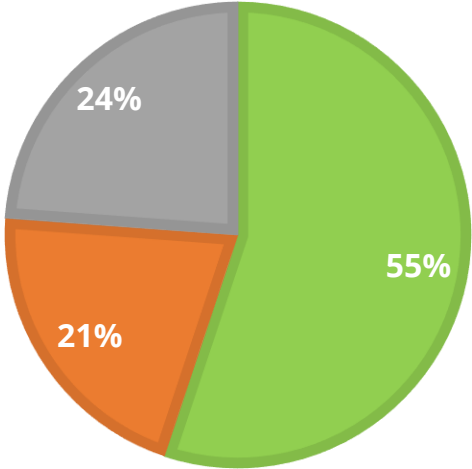
Black Sea&Danube Region: Oilseeds crop, K mt



+5 M mt

Black Sea & Danube region: Oilseed crop structure

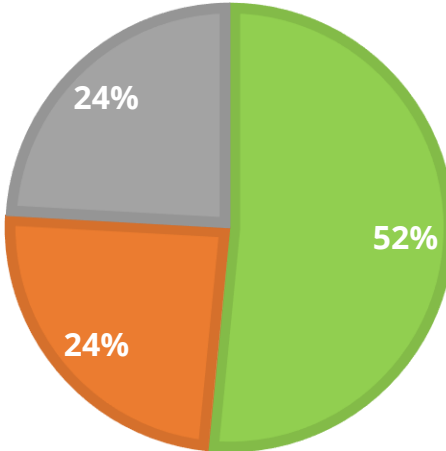
2026/27



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 Sunseed  Soybean  Rapeseed

2025/26

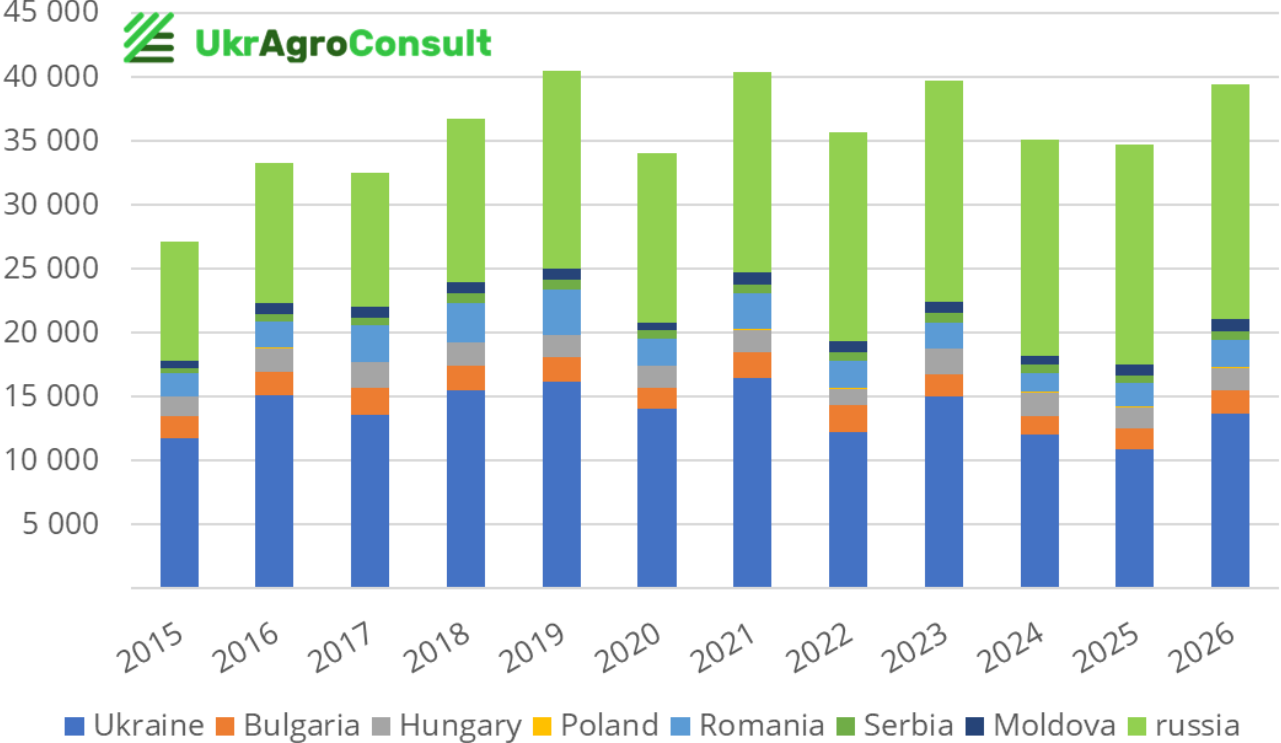


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 Sunseed  Soybean  Rapeseed

Sunflower

Black Sea&Danube Region: Sunflower crop, K mt



Sunflower planting, Th ha

Country	2025	2026	+/-
Ukraine	5900	6100	200
Bulgaria	970	995	25
Hungary	711	693	-18
Poland	24	29	5
Romania	1 205	1 220	15
Serbia	242	244	2
Moldova	500	550	50
russia	11043	11150	107
Total	20 595	20 981	386

Sunflower oil



Ukraine focus on

**EU
India
Egypt
Turkey
Iraq**



EU focus on

**Covering one's own
needs EU**



russia - focus on

**India
Turkey
Iran
Egypt**



Sunflower oil: Ukraine VS russia

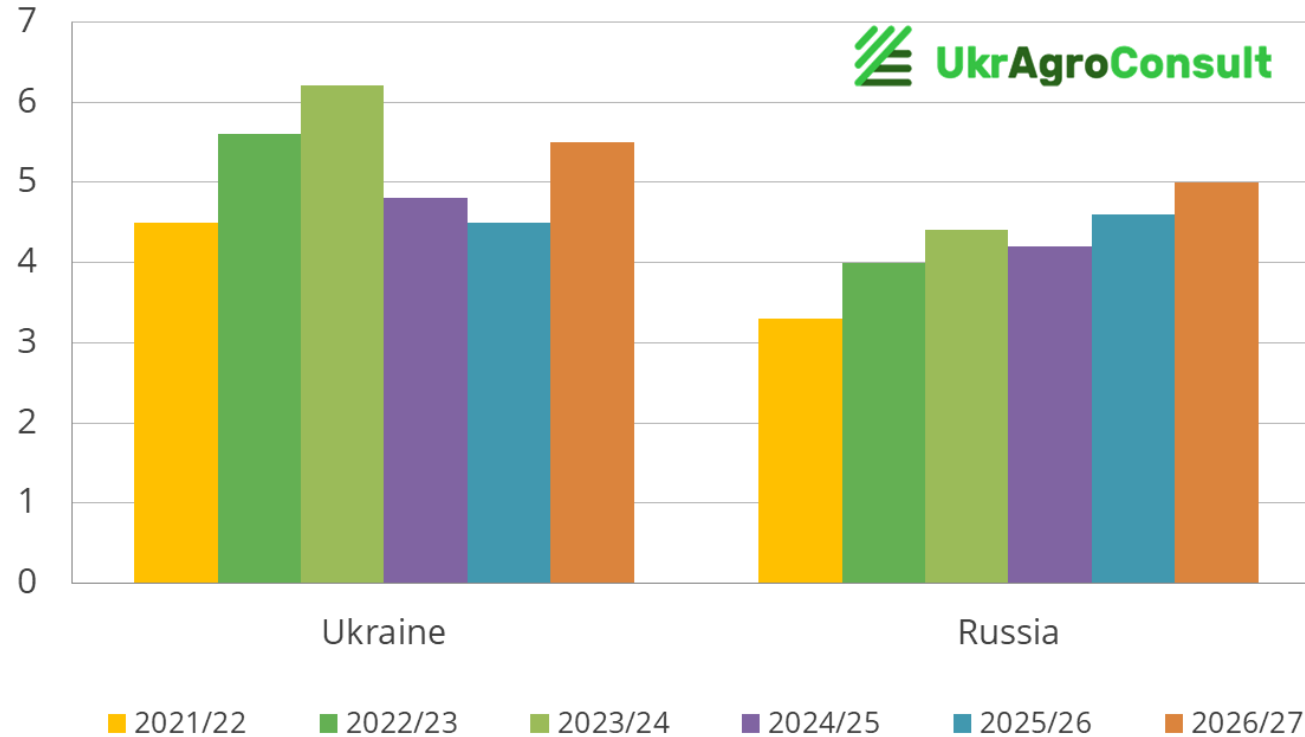


Sunoil exports, M mt

5,5



4,5



5,1



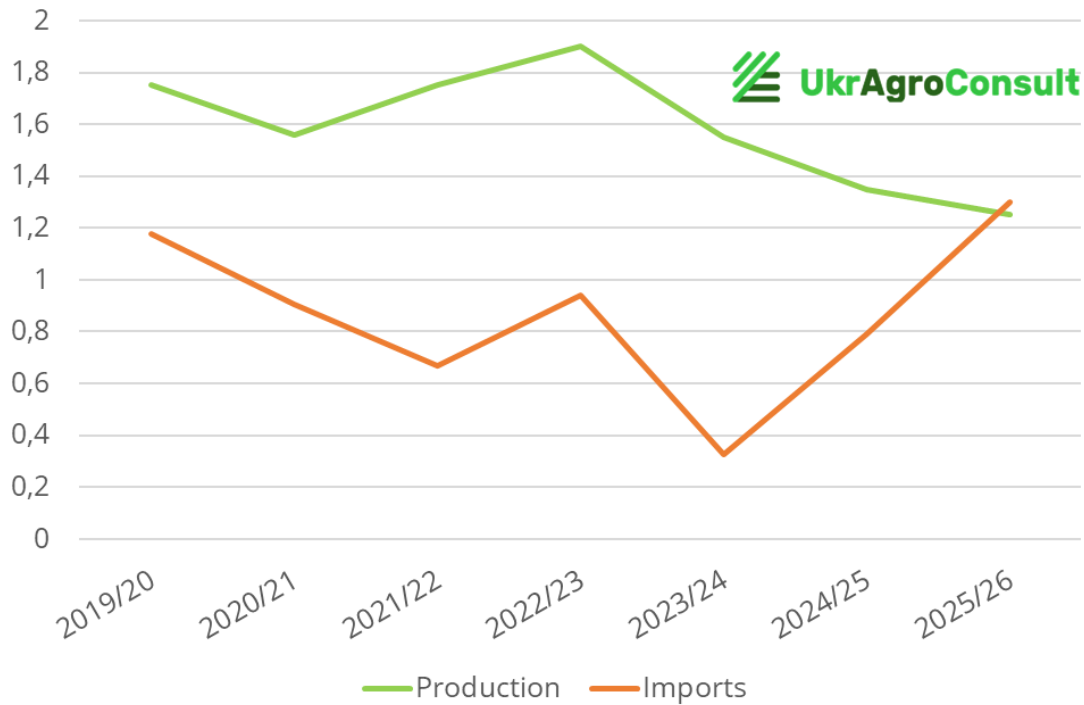
4,6



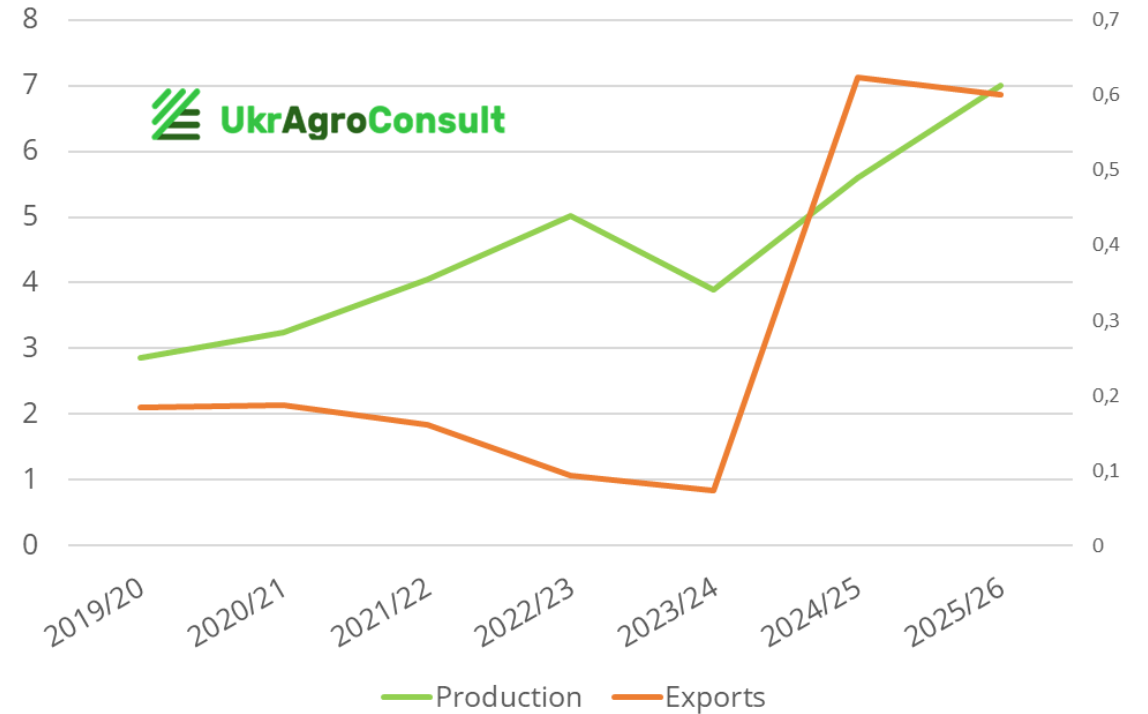
Sunflower oil



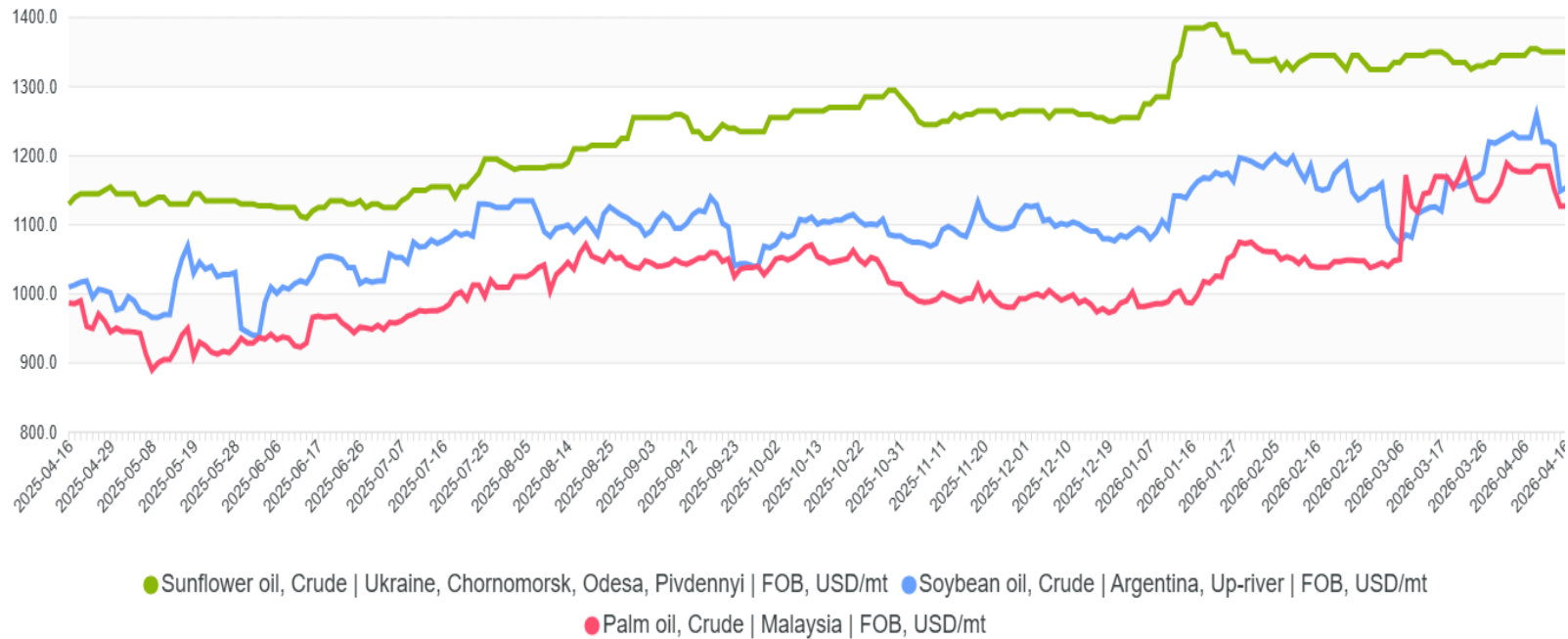
Turkey: Sunflower production and imports, M mt



Argentina: Sunflower production and exports, M mt



Vegoil prices

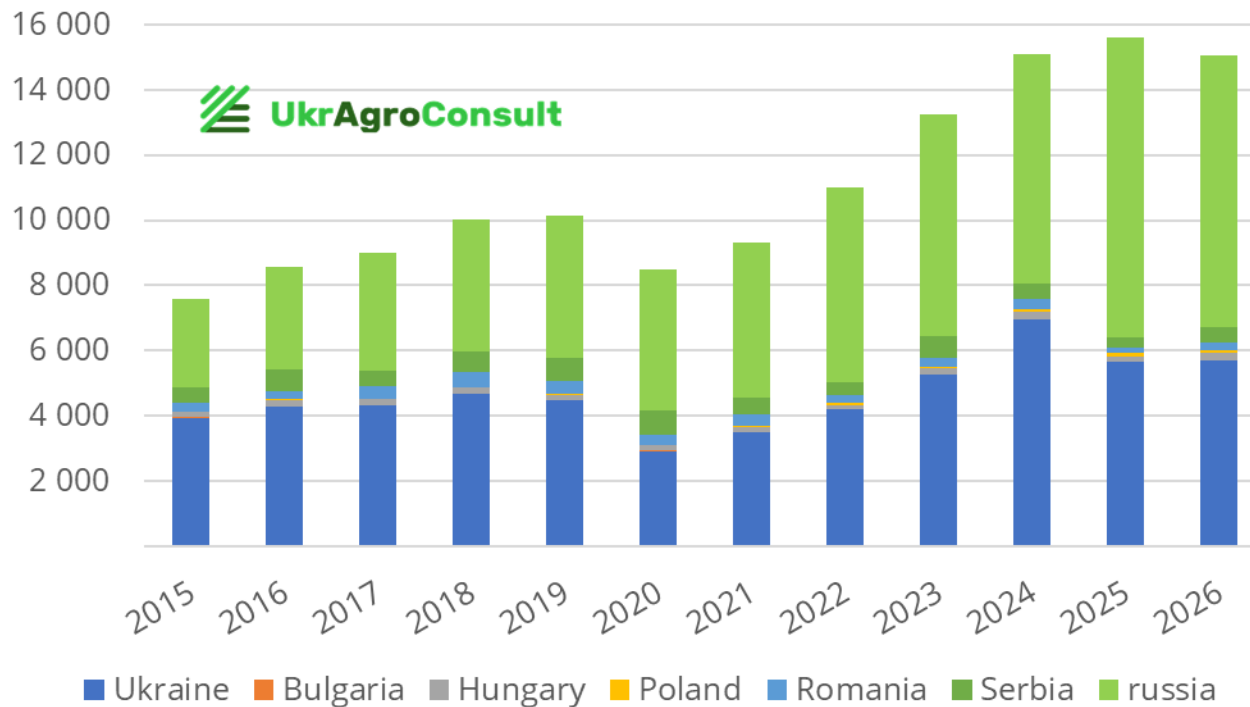


Sunflower oil Europe, six ports, FOB

April - 1455 USD/Mt
May/Jun. - 1470 USD/Mt
Jul./Aug//Sep. - 1475 USD/Mt
Oct./Nov./Dec. - **1325** USD/Mt

Soybean

Black Sea&Danube Region: Soybean crop, K mt



Soybean planting, Th ha

Country	2025	2026	+/-
Ukraine	2 400	2300	-100
Bulgaria	1	4	3
Hungary	79	84	5
Poland	38	33	-5
Romania	124	125	1
Serbia	206	210	4
russia	4731	4600	-131
Total	7 579	7 356	-223

Soybean



Ukraine

Soybean export duty – 10%
Increase in processing
Export of processed products
Focus on EU (oil, meal)
Focus on EU, Turkey,
(soybean)



EU

Import dependence
Soybean: USA, Brazil,
Argentina, Canada, Ukraine
Soymeal: Brazil, Argentina

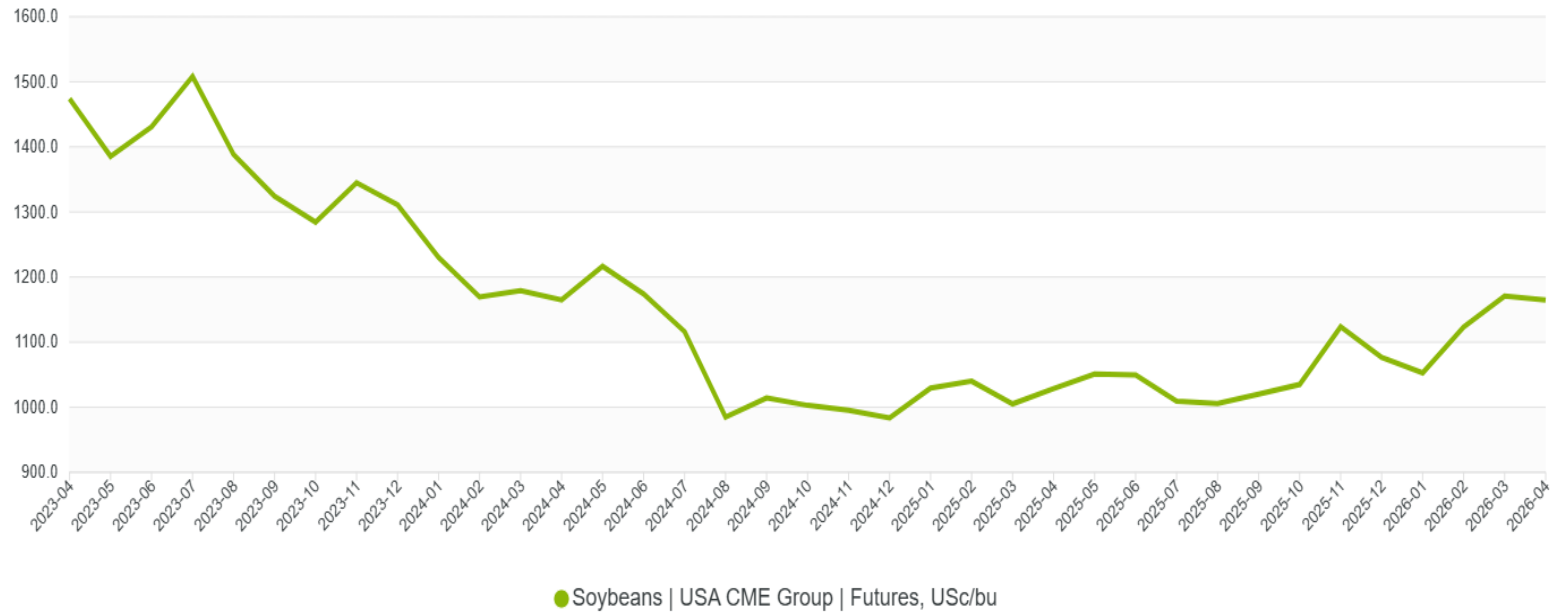


russia

Soybean export duty – 20%
Increase in processing
Import substitution
Focus on India, China (oil)

Soybeans prices

Soybeans | USA CME Group | Futures, US\$/bu



Soybeans USA, CME Group, Futures

May - 1167 USD/bu

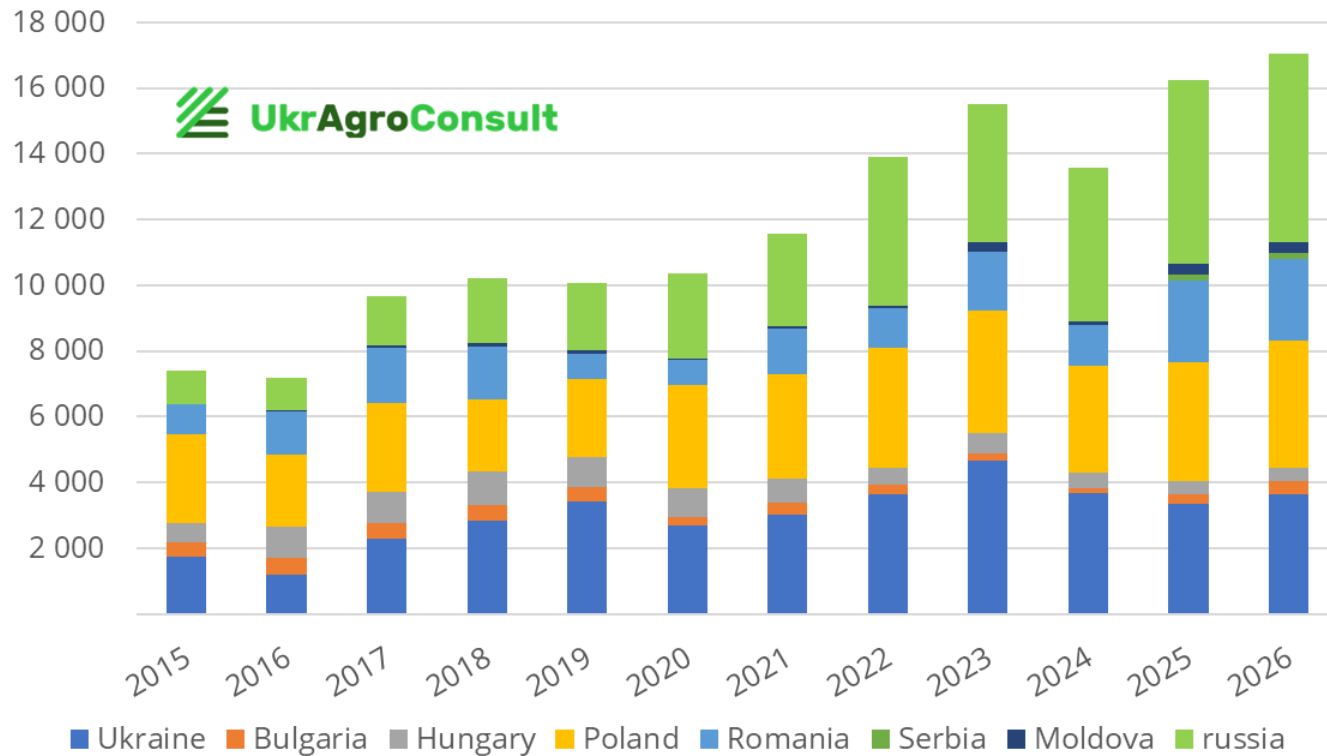
Jul. - 1183 USD/bu

Aug. - 1176 USD/bu

Sep. - **1152** USD/bu

Rapeseed

Black Sea&Danube Region: Rapeseed crop, K mt



Rapeseed planting, Th ha

Country	2025	2026	+/-
Ukraine	1380	1350	-30
Bulgaria	120	160	40
Hungary	144	153	9
Poland	1097	1 105	8
Romania	788	830	42
Serbia	48	50	2
Moldova	130	130	0
russia	2960	3100	140
Total	6 667	6 878	211

Rapeseed



Ukraine

Rapeseed export duty – 10%
Increase in processing
Export of processed products
Focus on EU (rapeseed, oil)
Focus on China, Turkey (meal)



EU

Covering one's own needs
EU
Rapeseed imports:
Ukraine, Canada,
Australia, Moldova



russia

Rapeseed export duty – 30%
Increase in processing
Focus on China

Rapeseed prices

Rapeseed | France Euronext | Futures, EUR/t



Rapeseed France Euronext, Futures

May – 509,25 EUR/Mt
Aug. – **495,0** EUR/Mt
Nov. – 498,0 EUR/Mt
Feb. 26 – 498,25 EUR/Mt

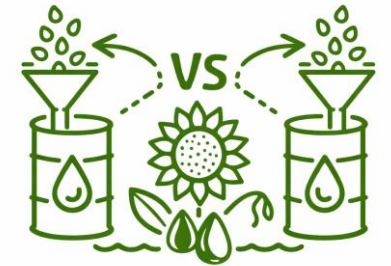
What should we expect from 2026/27?



Increase in yields



Military conflicts



Competition for markets



Growth in processing



Climate risks



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Thank you!