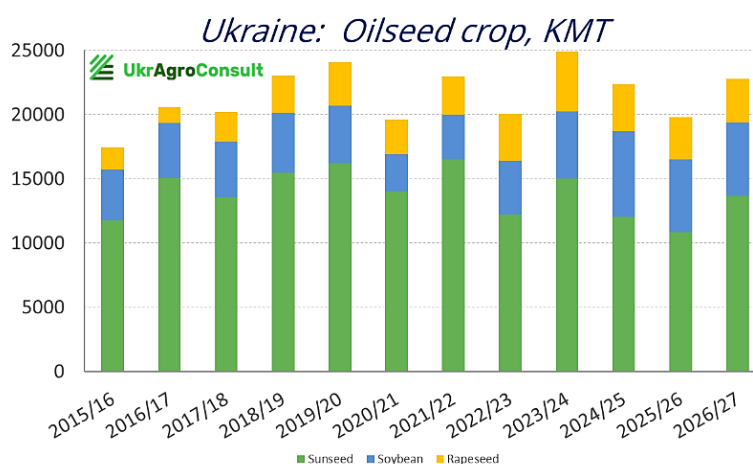


UKRAINE OILSEEDS 2026/27: BIGGER CROP AHEAD, BUT LATE SOWING KEEPS THE MARKET NERVOUS. DOES BIGGER CROP MEAN CHEAPER OILSEED?

- *Spring sowing is slow due to weather factor*
- *The sunflower market remains stable*
- *In the new 2026/26, soybean exports and domestic processing will be better balanced*
- *Rapeseed processing in the coming season may reach a new high*

The 2026/27 season Ukraine oilseed production outlook is cautiously bullish. Total oilseed output is expected at 22.8 M mt, up 15% from 2025/26. This is positive for Ukraine’s processing sector. However, the Gov’t is clarifying the rules for oilseeds exports in the 2026/27 season.



Source: UkrAgroConsult estimations

Spring oilseed sowing is well behind last year and the five-year average due to weather. This is the main short-term risk.

Ukraine. Oilseed sowing progress, May 4 2026, K ha

Crop	2026	2025	5-year average
Sunflower	1506.8	2364.8	2479.5
Soybean	377.1	729.2	412.0

Source: Ukrainian Statistics Office

Late sowing increases the risks if weather turns negative in July–Sep:

- flowering and seed filling may fall into summer heat and moisture stress
- root development may weaken, reducing yield potential, lowering oil content, delaying maturation
- drying costs rise at harvest time of Sept-Oct 2026
- late planting may shift harvest dates to a period of peak demand for logistics and grain storage infrastructure.

A supply shortage will be a significant factor supporting domestic oilseed prices during the final months of the current 2025/26 season and the first months of the next one.

Sunflower

Ukraine's sunflower market is stable at the start of May.

For 2025, official crop figure is 10.24 M mt, while UkrAgroConsult estimates 10.8 M mt. For 2026/27, sunflower seed production is forecast at 13.7 M mt vs. 10.8 M mt in 2025/26. The increase is based on larger planted area and yield recovery. But the market should not ignore the risk of late sowing and summer weather.

This creates a much larger supply for both crushing and export of processed products. Sunflower oil production may rise to 5.8 M mt, with exports at 5.5 M mt. Sunflower meal production may also reach 5.8 M mt, with exports at 4.3 M mt.

Ukraine. Sunflower S&D

Sunseed	2026/27		2025/26	
	APR	MAY	APR	MAY
Opening stocks	139	139	356	356
Area seeded, Th ha	6100	6100	5900	5900
Area harvested, Th ha	6050	6050	5650	5650
Yield, MT/ha	2,26	2,26	1,92	1,92
Production	13673	13673	10848	10848
Imports	20	20	20	20
SUPPLY	13832	13832	11224	11224
Crushing	13500	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	13655	13655	11085	11085
Ending stocks	177	177	139	139

Source: UkrAgroConsult estimations

Soybeans

Ukraine 2025 soybean crop was officially reported at 4.98 M mt. UkrAgroConsult May estimates declined down to 5.45 M mt (April figure was 5.64 M mt). The decline leading to a lower soy export potential in 2025/26 of around 2.4 M mt.

For 2026/27, soybean production is expected to rise moderately to 5.69 M mt. This allows Ukraine to maintain both strong exports at 2.6 M mt, and rising processing (2.8 M mt).

The key trend is growing processing, with soy exports remaining important.

Ukraine. Soybean S&D

Soybean	2026/27		2025/26	
	APR	MAY	APR	MAY
Opening stocks	101	113	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	2,32
Production	5693	5693	5640	5452
Imports	2	2	2	2
SUPPLY	5795	5807	5681	5493
Crushing	2800	2800	2700	2700
Other uses	70	70	70	70
Seeds	200	200	200	200
Exports	2600	2600	2600	2400
Losses	10	10	10	10
DEMAND	5680	5680	5580	5380
Ending stocks	115	127	101	113

Source: UkrAgroConsult estimations

Rapeseed

Ukraine's 2025 rapeseed crop was officially reported at 3.21 M mt, while UkrAgroConsult estimates 3.26 M mt. Export in 2025/26 is now reduced to around 1.95 M mt.

For 2026/27, rapeseed production is forecast at 3.41 M mt vs. 3.26 M mt in 2025/26. Impact of spring frosts on winter rapeseed has been factored in, with crop losses increased to 10%.

Despite this, domestic processing may reach a historical high of 1.4 M mt. This is the most important signal in rapeseed, Ukraine is moving deeper into value-added processing.

But exports will still compete for raw oilseed, keeping the domestic market tight.

Ukraine. Rapeseed S&D

Rapeseed	2026/27		2025/26	
	APR	MAY	APR	MAY
Opening stocks	52	100	83	83
Area seeded, Th ha	1350	1350	1380	1380
Area harvested, Th ha	1286	1218	1260	1245
Yield, MT/ha	2,84	2,8	2,63	2,62
Production	3652	3410	3314	3262
Imports	10	10	10	10
SUPPLY	3714	3520	3407	3355
Crushing	1500	1400	1300	1300
Seeds	3	3	3	3
Exports	2100	2050	2050	1950
Losses	2	2	2	2
DEMAND	3605	3455	3355	3255
Ending stocks	109	65	52	100

Source: UkrAgroConsult estimations

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