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Report Highlights:

MY 2023/24 saw rather disappointing yields for the UK rapeseed oilseed crop overall. In MY 2024/25 rapeseed production is forecast even lower at 900 thousand metric tons (MT) due to a combination of poor growing conditions, a sharp fall in the price of rapeseed, pest pressure and the increased attractiveness of agri-environment options. In MY 2024/25 imports of rapeseed oilseeds are forecast partly to fill the gap created by low domestic rapeseed production, with pressure also eased by lower expected demand from the livestock/dairy sectors.

Disclaimer: This report presents Post’s first outlook for oilseeds and products, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2024/25, as well as estimates for MY 2023/24 and the historical context of MY 2022/23. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the UK and is not official USDA data. USDA official numbers in this report include the World Agricultural Supply and Demand Estimates (WASDE) April 2024 release.

Trade figures are revised according to the most recent data available from Trade Data Monitor (January 2024).

Abbreviations used in this report:

EU European Union
FAS Foreign Agricultural Service
Ha Hectares
MMT Million Metric Tons
MT Metric Ton (1000 kg)
MY Marketing Year
CY Calendar Year
TMT Thousand Metric Tons
TY Trade Year
UK United Kingdom
U.S. United States

The marketing years used in this report are:

January - December

Palm kernel meal / oil
Palm oil
Fish meal

July - June

Rapeseed complex

October - September

Soybean complex
Sunflower complex
Peanut seed

November - October

Olive oil

Executive Summary

Total United Kingdom (UK) rapeseed oilseed production in marketing year (MY) 2024/25 is forecast to be 0.9 million metric tons (MMT), the lowest in the last 25 years, with the harvested area forecast to be the lowest since the mid-1980s. The MY 2024/25 low forecast is due to a combination of poor growing conditions, a sharp fall in the price of rapeseed, pest pressure and the increased attractiveness of agri-environment options (see Policy section). The rapeseed crop that is in the ground is contending with waterlogged soil and pest vulnerability which is expected to lead to yields that are mediocre at best.

In MY 24/25, the UK is forecast to become more reliant on imports of rapeseed to ensure domestic oilseed crushing plants can manage production volumes. Rapeseed oil production is forecast to reduce sharply in MY 2024/25 with stocks likely to be drawn down, due to the low availability of rapeseed and the reduced crush volume.

Soybean imports for crushing, particularly from Brazil, have increased in MY 2023/24 and are forecast to decline only slightly in MY 2024/25. Argentina remains the key exporter of soybean meal to the UK market, followed by Brazil and with the United States and Paraguay competing for third. Only approved soybean varieties and associated products may be exported to the UK. Exporters should be aware that certain biotech events/varieties recently approved for the European Union (EU) are not yet approved in the UK (see Policy section).

The war in Ukraine continues to add volatility to the global agricultural commodity markets, including the oilseeds market. Depending on further developments, oilseeds market conditions and current assumptions made in this report may change.

Rapeseed – Oilseed

Production

The total UK rapeseed area in MY 2024/25 is forecast to be the lowest since the mid-1980s. The area harvested is expected to fall below 300 thousand hectares for the first time in 40 years, a decline from 100 thousand hectares in MY 2023/24 and less than half of the peak area prior to the ban of neonicotinoid seed treatments in 2013. This low MY 2024/25 forecast is due to a combination of poor growing conditions, a sharp fall in the price of rapeseed, pest pressure and the increased attractiveness of agri-environment options (as described in the Policy section below). A late harvest in 2023 and wet weather (impacting planting and causing waterlogging of crops) is expected to cause above average crop losses. At the time of writing, crop condition reporting suggests that less than a third of the winter oilseed rape crop is rated in good or excellent condition, with fertilizer applications delayed and weaker plants more vulnerable to pests. The consequence of these negative factors is a production forecast of 900,000 MT for MY 2024/25, down more than 25 percent from the revised estimate in the previous year.

Consumption

The UK primarily utilizes rapeseed oilseeds for crush byproducts, specifically rapeseed meal and rapeseed oil. Rapeseed oil for human consumption is a high-end product and the most important usage for rapeseed in the UK. The UK annually consumes approximately 2.5 MMT of rapeseed as seed, oil, or meal. This figure is expected to fall slightly in MY 2024/25, with imports only partially filling expected domestic production declines.

Trade

The UK was historically a net exporter of rapeseed oilseeds. However, a ban on the use of neonicotinoid chemicals has made domestic rapeseed production challenging and made the UK more reliant on imports. The disappointing harvest in MY 2023/24 increased demand for imports. Between July 2023 and January 2024, the UK imported just under 535,000 MT, up 10.5 percent compared to the 483,000 MT in the period in MY 2022/23. A notable increase in imports was recorded from Ukraine (up almost 120,000 MT), while imports during that period from the EU were down four percent despite imports from both Poland and Bulgaria increasing by around 30,000 MT each. Imports are currently forecast to significantly increase in MY 2024/25 to around 875,000 MT due to the negative UK crop outlook. Low production and tight domestic supplies are, however, expected to reduce UK exports in MY 2024/25 to around 35,000 MT.

Stocks

MY 2024/25 overall stocks of rapeseed oilseed are forecast to lower due to the disappointing domestic harvest in MY 2023/24 and the negative production outlook for MY 2024/25. Ending stocks in MY 2024/25 are forecast at 54,000 MT a decline of 43 percent over MY 2022/23.

Rapeseed Oilseed Table

Oilseed, Rapeseed Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	364	365	410	391	0	300
Area Harvested (1000 HA)	364	365	390	391	0	280
Beginning Stocks (1000 MT)	65	65	93	95	0	55
Production (1000 MT)	1361	1361	1225	1216	0	900
MY Imports (1000 MT)	725	725	750	760	0	875
Total Supply (1000 MT)	2151	2151	2068	2071	0	1830
MY Exports (1000 MT)	33	33	40	60	0	35
Crush (1000 MT)	1945	1950	1875	1875	0	1650
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	80	73	75	81	0	91
Total Dom. Cons. (1000 MT)	2025	2023	1950	1956	0	1741
Ending Stocks (1000 MT)	93	95	78	55	0	54
Total Distribution (1000 MT)	2151	2151	2068	2071	0	1830
Yield (MT/HA)	3.739	3.7288	3.141	3.11	0	3.2143
(1000 HA) ,(1000 MT) ,(MT/HA)						

Rapeseed meal

Production

Production of rapeseed meal in MY 2023/24 is expected to fall back to levels reminiscent of 2021/22. The forecast for MY 2024/25 could fall closer to MY 2021/22, reflective of the negative outlook for UK rapeseed production, with a production forecast figure down around 12 percent on the previous year.

Feed Consumption

The UK livestock sector is the primary demand driver for rapeseed meal. The UK is a major producer and exporter of meat and dairy products. However, declines in pork and cattle production are expected to lower feed demand for rapeseed meal in MY 2024/25 to 1.1 MMT (a decline of 12 percent year-over-year). Rapeseed meal can be substituted with soybeans and soybean meal, domestic sunflower meal, and other grains in feed formulations, depending on global prices. In dairy production, rapeseed meal has become the dominant feed ingredient as an affordable alternative to soybean meal. For poultry and swine production, soybean meal remains the top choice in feed ratios. Market volatility for feed ingredients is the main driver for substituting meals, but it would take a significant discount in the price of soya to squeeze rapeseed meal out of the market.

Rapeseed Meal Table

Meal, Rapeseed Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	1945	1950	1875	1875	0	1650
Extr. Rate, 999.9999 (PERCENT)	0.5702	0.5692	0.5707	0.5707	0	0.5697
Beginning Stocks (1000 MT)	75	75	72	73	0	78
Production (1000 MT)	1109	1110	1070	1070	0	940
MY Imports (1000 MT)	244	244	250	250	0	220
Total Supply (1000 MT)	1428	1429	1392	1393	0	1238
MY Exports (1000 MT)	81	81	75	65	0	60
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	1275	1275	1250	1250	0	1100
Total Dom. Cons. (1000 MT)	1275	1275	1250	1250	0	1100
Ending Stocks (1000 MT)	72	73	67	78	0	78
Total Distribution (1000 MT)	1428	1429	1392	1393	0	1238
(1000 MT) ,(PERCENT)						

Rapeseed Oil

Production

Demand for rapeseed oil is the main driver for the rapeseed market in the UK. The UK predominately produces oil for food use with a small, but stable, quantity for industrial use. Rapeseed oil production is forecast to reduce sharply in MY 2024/25 principally due to the low availability of rapeseed and the reduced crush volume.

Consumption

Food consumption of rapeseed oil in MY 2023/24, was driven by higher imports from France, Belgium and Germany. Strong domestic food use consumption is expected to absorb import volumes in MY 2023/24. In MY 2024/25, consumption is expected to decline slightly as stocks are expected to be drawn down on reduced production. Industrial consumption remains a small but stable part of UK consumption.

Rapeseed Oil Table

Oil, Rapeseed Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	1945	1945	1875	1875	0	1650
Extr. Rate, 999.9999 (PERCENT)	0.4	0.4	0.4	0.4	0	0.4
Beginning Stocks (1000 MT)	41	41	24	24	0	44
Production (1000 MT)	778	778	750	750	0	660
MY Imports (1000 MT)	80	80	100	125	0	140
Total Supply (1000 MT)	899	899	874	899	0	844
MY Exports (1000 MT)	65	65	100	70	0	65
Industrial Dom. Cons. (1000 MT)	20	20	20	20	0	20
Food Use Dom. Cons. (1000 MT)	790	790	720	765	0	745
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	810	810	740	785	0	765
Ending Stocks (1000 MT)	24	24	34	44	0	14
Total Distribution (1000 MT)	899	899	874	899	0	844
(1000 MT) ,(PERCENT)						

Soybean Seed

Consumption and Trade

The UK imports of soybeans are predominately for use in crushing, food use, and livestock feed. The main supplier is Brazil, followed by the United States and Canada, with imports from the latter declining markedly in MY 2022/23. Soybean imports compete directly with rapeseed in the livestock feed sector dependent on input costs. Soybean imports for crushing, particularly from Brazil, have increased in MY 2023/24 and are forecast to decline slightly in MY 2024/25 due to lower demand from livestock and dairy sectors.

Soybean Seed Table

Oilseed, Soybean Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	33	33	28	28	0	18
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	910	910	925	940	0	930
Total Supply (1000 MT)	943	943	953	968	0	948
MY Exports (1000 MT)	0	0	5	5	0	1
Crush (1000 MT)	840	840	830	855	0	845
Food Use Dom. Cons. (1000 MT)	40	40	40	45	0	35
Feed Waste Dom. Cons. (1000 MT)	35	35	50	45	0	40
Total Dom. Cons. (1000 MT)	915	915	920	945	0	920
Ending Stocks (1000 MT)	28	28	28	18	0	27
Total Distribution (1000 MT)	943	943	953	968	0	948
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)

Soybean Meal

Consumption and Trade

The amount of soyabean crush in the UK is expected to remain broadly stable, with the estimate for MY 2023/24 and forecast for MY 2024/25 deviating by only a couple of percent. Imports for the four months up to January 2024 were 14 percent up on the equivalent period the previous year, suggesting a return to the historic import trend. These increased import volumes are forecast to carry over into MY 2024/25, with a corresponding rise in feed use and increased demand due to lower domestic production of rapeseed. Argentina remains the key exporter to the UK market, followed by Brazil, with the United States and Paraguay alternating as third largest suppliers.

Soybean Meal Table

Meal, Soybean Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	840	840	830	855	0	845
Extr. Rate, 999.9999 (PERCENT)	0.7798	0.7798	0.7795	0.7778	0	0.7751
Beginning Stocks (1000 MT)	50	50	58	33	0	33
Production (1000 MT)	655	655	647	665	0	655
MY Imports (1000 MT)	1762	1762	2000	2050	0	2075
Total Supply (1000 MT)	2467	2467	2705	2748	0	2763
MY Exports (1000 MT)	84	84	75	90	0	80
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	2325	2350	2550	2625	0	2650
Total Dom. Cons. (1000 MT)	2325	2350	2550	2625	0	2650
Ending Stocks (1000 MT)	58	33	80	33	0	33
Total Distribution (1000 MT)	2467	2467	2705	2748	0	2763
(1000 MT) ,(PERCENT)						

Soybean Oil

Consumption and Trade

UK soybean oil imports and food use remain strong while industrial use is now around 20,000 MT per year as UK biofuel production focuses mainly on grain and corn. This focus will, however, be constrained by the commitment in the UK government's [Renewable Transport Fuel Obligation](#), which has set a cap on the crop-based contribution of biofuels, with that maximum level decreasing on a linear path from four percent initially down to two percent by 2032.

Any fluctuation in soybean crush is met by imports, almost entirely from the EU and Norway.

Soybean Oil Table

Oil, Soybean Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	840	840	830	855	0	845
Extr. Rate, 999,9999 (PERCENT)	0.1857	0.1857	0.1867	0.1871	0	0.187
Beginning Stocks (1000 MT)	33	33	22	22	0	27
Production (1000 MT)	156	156	155	160	0	158
MY Imports (1000 MT)	159	159	175	190	0	185
Total Supply (1000 MT)	348	348	352	372	0	370
MY Exports (1000 MT)	31	31	30	25	0	30
Industrial Dom. Cons. (1000 MT)	20	15	25	20	0	20
Food Use Dom. Cons. (1000 MT)	275	280	280	300	0	295
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	295	295	305	320	0	315
Ending Stocks (1000 MT)	22	22	17	27	0	25
Total Distribution (1000 MT)	348	348	352	372	0	370
(1000 MT) ,(PERCENT)						

Other Oilseeds

Sunflowerseed

Oilseed, Sunflowerseed Market Year Begins	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
United Kingdom						
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	51	51	50	60	0	60
Total Supply (1000 MT)	51	51	50	60	0	60
MY Exports (1000 MT)	1	1	1	1	0	1
Crush (1000 MT)	25	25	24	32	0	34
Food Use Dom. Cons. (1000 MT)	5	5	5	5	0	5
Feed Waste Dom. Cons. (1000 MT)	20	20	20	22	0	20
Total Dom. Cons. (1000 MT)	50	50	49	59	0	59
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	51	51	50	60	0	60
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						

Peanuts

Oilseed, Peanut Market Year Begins	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
United Kingdom						
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	37	37	59	30	0	30
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	321	298	275	310	0	305
Total Supply (1000 MT)	358	335	334	340	0	335
MY Exp. to EU (1000 MT)	8	12	8	13	0	12
Crush (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	290	290	295	295	0	295
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	290	290	295	295	0	295
Ending Stocks (1000 MT)	59	30	30	30	0	25
Total Distribution (1000 MT)	358	335	334	340	0	335
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						

Consumption and Trade

Post data for MY 2022/2023 now deviates significantly from USDA Official numbers after market commentators drew attention to a suspected anomaly with the classification of peanut 'seed' imports from the United States. Food use consumption has been amended downwards accordingly.

Other Meals

Sunflowerseed Meal

Meal, Sunflowerseed Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	25	25	24	32	0	34
Extr. Rate, 999.9999 (PERCENT)	0.44	0.44	0.4167	0.4375	0	0.4412
Beginning Stocks (1000 MT)	42	42	24	29	0	30
Production (1000 MT)	11	11	10	14	0	15
MY Imports (1000 MT)	348	348	410	380	0	375
Total Supply (1000 MT)	401	401	444	423	0	420
MY Exports (1000 MT)	2	2	3	3	0	3
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	375	370	420	390	0	395
Total Dom. Cons. (1000 MT)	375	370	420	390	0	395
Ending Stocks (1000 MT)	24	29	21	30	0	22
Total Distribution (1000 MT)	401	401	444	423	0	420
(1000 MT) ,(PERCENT)						

Palm Kernel Meal

Meal, Palm Kernel Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	314	314	350	310	0	300
Total Supply (1000 MT)	314	314	350	310	0	300
MY Exports (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	314	314	350	310	0	300
Total Dom. Cons. (1000 MT)	314	314	350	310	0	300
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	314	314	350	310	0	300
(1000 MT) ,(PERCENT)						

Fish Meal

Meal, Fish Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Catch For Reduction (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	35	35	35	35	0	35
MY Imports (1000 MT)	90	91	110	100	0	105
Total Supply (1000 MT)	125	126	145	135	0	140
MY Exports (1000 MT)	5	5	15	10	0	10
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	120	121	130	125	0	130
Total Dom. Cons. (1000 MT)	120	121	130	125	0	130
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	125	126	145	135	0	140
(1000 MT) ,(PERCENT)						

Other Oils

Sunflowerseed Oil

Oil, Sunflowerseed Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	25	25	24	32	0	34
Extr. Rate, 999.9999 (PERCENT)	0.44	0.44	0.4167	0.4375	0	0.4412
Beginning Stocks (1000 MT)	20	20	14	14	0	13
Production (1000 MT)	11	11	10	14	0	15
MY Imports (1000 MT)	199	199	280	275	0	280
Total Supply (1000 MT)	230	230	304	303	0	308
MY Exports (1000 MT)	13	13	12	12	0	13
Industrial Dom. Cons. (1000 MT)	3	3	3	3	0	3
Food Use Dom. Cons. (1000 MT)	200	200	275	275	0	280
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	203	203	278	278	0	283
Ending Stocks (1000 MT)	14	14	14	13	0	12
Total Distribution (1000 MT)	230	230	304	303	0	308
(1000 MT) ,(PERCENT)						

Palm Kernel Oil

Oil, Palm Kernel Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	17	17	20	15	0	15
Total Supply (1000 MT)	17	17	20	15	0	15
MY Exports (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	17	17	20	15	0	15
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	17	17	20	15	0	15
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	17	17	20	15	0	15
(1000 MT) ,(PERCENT)						

Palm Oil

Oil, Palm Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	26	26	24	24	0	16
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	381	381	380	340	0	335
Total Supply (1000 MT)	407	407	404	364	0	351
MY Exports (1000 MT)	8	8	7	10	0	10
Industrial Dom. Cons. (1000 MT)	20	20	20	18	0	18
Food Use Dom. Cons. (1000 MT)	355	355	355	320	0	310
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	375	375	375	338	0	328
Ending Stocks (1000 MT)	24	24	22	16	0	13
Total Distribution (1000 MT)	407	407	404	364	0	351
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)						

Olive Oil

Oil, Olive Market Year Begins United Kingdom	2022/2023		2023/2024		2024/2025	
	Nov 2023		Nov 2023		Nov 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	10	10	4	4	0	4
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	68	68	60	70	0	70
Total Supply (1000 MT)	78	78	64	74	0	74
MY Exports (1000 MT)	2	2	3	2	0	2
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	72	72	57	68	0	68
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	72	72	57	68	0	68
Ending Stocks (1000 MT)	4	4	4	4	0	4
Total Distribution (1000 MT)	78	78	64	74	0	74
(1000 HA) ,(1000 TREES) ,(1000 MT)						

Policy

With its departure from the EU, the UK introduced its [Global Tariff](#), a simplification of the EU tariff regime. In the start of 2023, the UK implemented a voluntary tariff suspension on sunflower-seed oil (effective through December 31, 2024) due to supply chain disruptions caused by the war in Ukraine.

In other areas, the UK continues to generally follow the EU, and divergence has been limited but is expected to increase over time. For example, with its departure from the EU, the UK has departed the Common Agricultural Policy (CAP) and has introduced its own domestic agricultural policy in England, with Wales, Scotland, and Northern Ireland developing their own CAP replacements.

Maximum Residue Limits (MRLs)

The UK and EU agreed the [Trade and Cooperation Agreement \(TCA\)](#) on December 24, 2020, and trade between the two remains tariff free, albeit subject to increased paperwork due to the UK's departure from the EU's customs union and single market. Post-Brexit trade has been disrupted by non-tariff barriers in the form of additional paperwork and delays at EU borders. There has also been a shift in trade from the UK to the EU, as the UK no longer has a role as a transshipment hub for exports to the EU. The UK has regained powers to set maximum residue levels (MRLs) for imports and approve chemicals for use in UK crops, albeit that the post-Brexit arrangements mean Northern Ireland continues to follow EU regulations. The Health and Safety Executive (HSE), which is an executive, non-departmental body sponsored by the Department for Work and Pensions, has delegated authority for pesticide residues. HSE is commencing its own MRL reviews to adjust MRLs in Great Britain as needed. However, there is public pressure to not move too far from EU MRLs as the EU remains a major market for Great Britain, and differing MRLs could cause challenges when exporting products, as well as complicate arrangements with Northern Ireland.

Biotech Approvals

The UK also now has its own approval mechanism for genetically engineered (biotech) events. See [FAS GAIN Biotech Report](#) for additional details. The second tranche of eight events (comprising three corn, three soy, one cotton, and one canola) brought forward for approval by the UK government post-Brexit received full authorization and came into force on April 26, 2023, for England, and the same day for the relevant legislation in Scotland and Wales. However, subsequent biotech approvals remain outstanding and the UK is lagging behind the EU approval of new biotech events.

Precision Breeding

The [Genetic Technologies \(Precision Breeding\) Bill](#) received Royal Assent on March 23, 2023, becoming an Act of Parliament and entering into force from midnight the same day. The Act constitutes a framework that enables new secondary legislation to be created, and amendments to be tabled for existing law. The first step in the proposed authorization system is a screening process by the Department for Environment, Food and Rural Affairs (Defra) to determine whether the product meets the definition of a Precision Bred Organism (PBO). If the product is not destined to enter the local food chain, it will be signed off by the Secretary of State for Defra. However, if the product is intended for local consumption (food or feed) the application will be passed to the Food Standards Agency (FSA)

and ‘triaged’ to determine if it must go through the Tier 1 or Tier 2 (more onerous) approval process. Tier 1 applications are for those products where the potential safety risks are understood and not of concern, while Tier 2 are for those for which the safety risks may require more detailed scrutiny, for example where the changes significantly alter the composition of the consumed organism.

Following a public consultation on proposals for a new framework in England for the regulation of PBOs used for food and animal feed, the FSA’s Board considered the next steps in a meeting in March 2024. The expectation set out in the [Board Paper](#) was that the secondary legislation needed to enact the framework would be collated into a Statutory Instrument due to be laid in the summer of 2024, with Parliamentary debates after summer recess. That instrument would set out:

- An authorization process for PBOs used in food and feed.
- A public register for all PBOs that have been authorized for use in food and feed.
- An enforcement regime to ensure compliance with the regulations.

Agri-Environment Options

The roll out of the post-Brexit farming incentive schemes is also having an apparent impact on oilseeds production. In England, where over 90 percent of the UK oilseed rape crop is normally grown, increased payment rates offered for actions contained in the Sustainable Farming Incentive (SFI) seem to be a contributing factor in low plantings. Survey results show the area of arable fallow up 79 percent on the previous year, with this effectively a proxy measure for agri-environment uptake in the SFI or other components of Defra’s Environmental Land Management schemes. In an effort to limit the impact on production, Defra [announced](#) on March 25, 2024 that it was capping the amount of arable land applicants could place in a number of SFI actions to no more than 25 per cent of their farm’s area. Nonetheless, with payment rates in Defra’s environmental incentive schemes having been increased significantly, it appears that many English farmers are regarding them as a more attractive break in the arable rotation than crops such as oilseed rape.

Attachments:

No Attachments