UNION ZUR FÖRDERUNG VON OEL- UND PROTEINPFLANZEN E.V.

UFOP Market Information Oilseeds and Biofuels

Contents

Market Headlines

Oilseeds

- Price increases temporarily stimulated trading activity in the rapeseed market.
- Rapeseed harvest 2025 kicked off in some regions of eastern Germany.
- Expectations of abundant supply and favourable weather conditions in the Midwest put pressure on soybean prices.

Oilseed meals and oilcakes

- Rapeseed meal weakened over the month.
- Soymeal prices declined.

Vegetable oils

- Demand for rapeseed oil remained muted at the turn of the season.
- Palm oil recently waned, with a strong Malaysian ringgit diminishing competitiveness.

Fuels

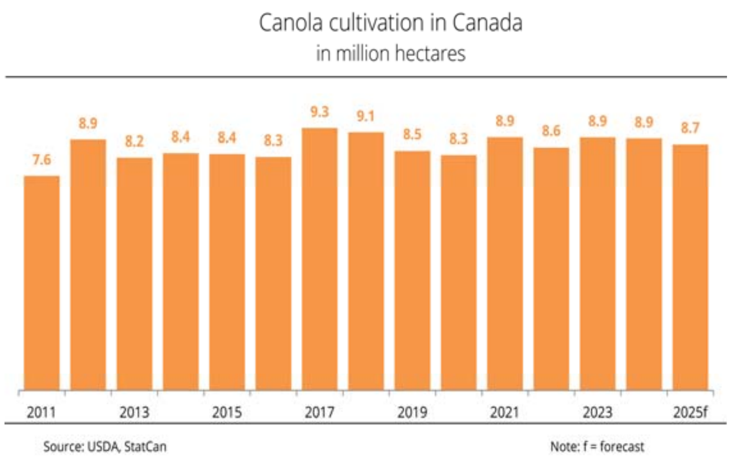
- Trading in the biodiesel market continued to trend towards zero.
- Crude oil prices were firmly influenced by the Middle East conflict.

Price trends

Mean price	Week 27	Previous week	Trend
Producer prices in EUR/t			
Rapeseed	483,72	487,93	↘
Wholesale prices in EUR/t			
Rapeseed	451	473	↘
Rapeseed oil	1.012	1.030	↘
Rapseseed meal	220,00	236,00	↘
Rapeseed cake*	290,00	.	↘
Rapeseed future	467,50	499,00	↘
Wholesale prices in ct/l, excl. VAT			
Biodiesel	167,93	169,45	↘
Consumer prices in ct/l incl. VAT			
Diesel	158,88	161,65	↘
Futures in US-$/barrel			
WTI, Nymex	65,11	68,51	↘

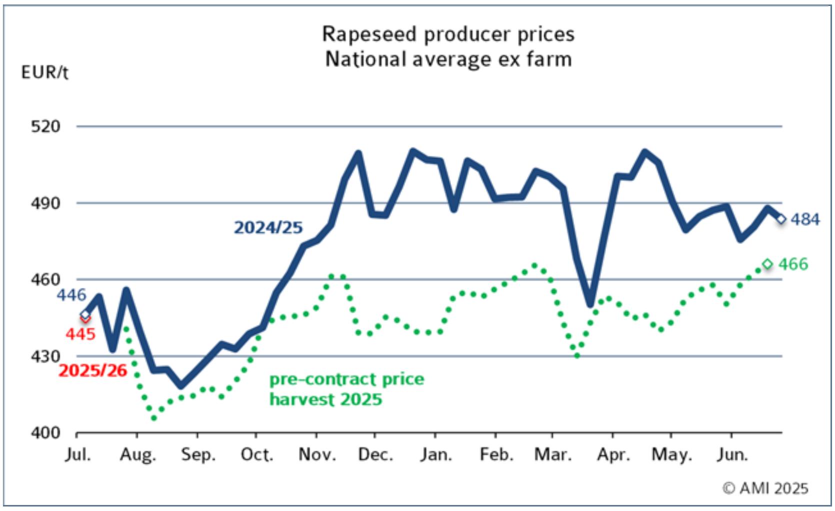
* = compared with previous month, selling prices by mills, rapeseed cake with at least 10 % fat, rapeseed meal 0 %

Chart of the week



Edition July 2025

Market prices

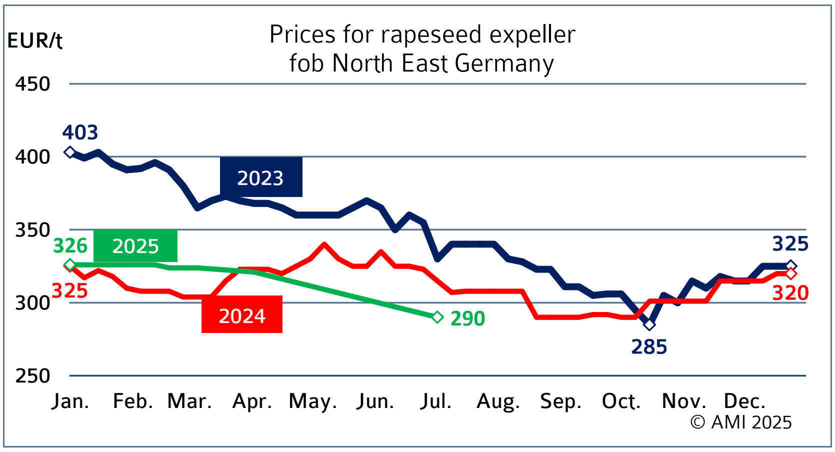


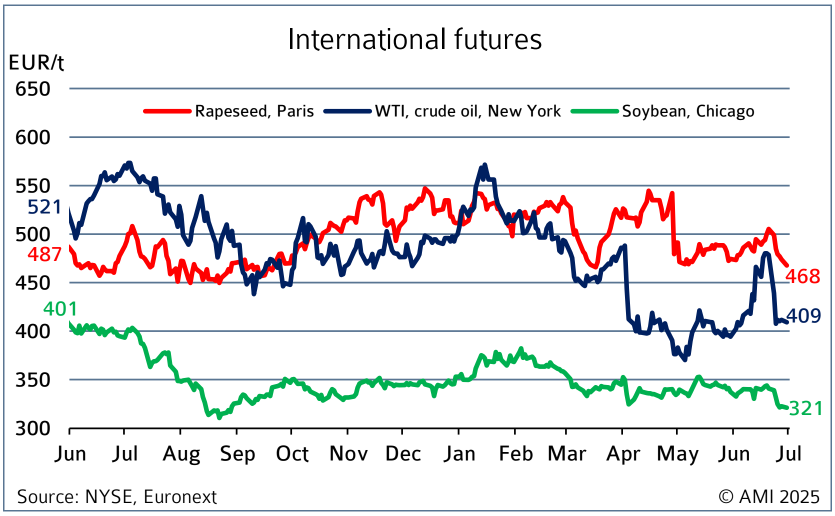
Wholesale prices

in EUR/t on 02.07.2025, (collected at mills and trade)

	Rapeseed 2024 franko	Rapeseed fob	Rapeseed oil fob	Palmoil cif
Spot	451	220	1012	1038
Previous week	473	236	1030	1057

Source: AMI





Rapeseed

At the end of June, trading activity in the domestic rapeseed market picked up noticeably. Some producers took advantage of temporary price peaks to sell. In some regions, marketing rates reached 25-40 per cent. Price volatility remained high, making short-term marketing decisions particularly challenging as prices declined at the start of the 2025/26 season. In parts of France, especially in northern Burgundy, the rapeseed harvest was already complete. Harvesting also began in some regions of Germany, driven mainly by concerns about premature pod shattering due to forecast rainfall.

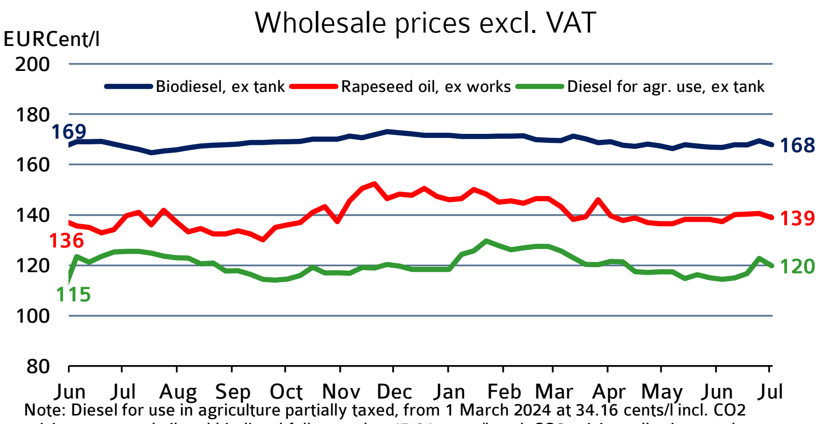
Rapeseed oil

Demand for rapeseed oil remained subdued throughout June, resulting in continued moderate sales. Although biodiesel prices temporarily firmed somewhat, the increase was insufficient to generate demand for rapeseed oil. Demand from consumers and the fuel sector remained low. The volume of contracts already secured for the newly started 2025/26 season remained limited. This situation led to increased market nervousness.

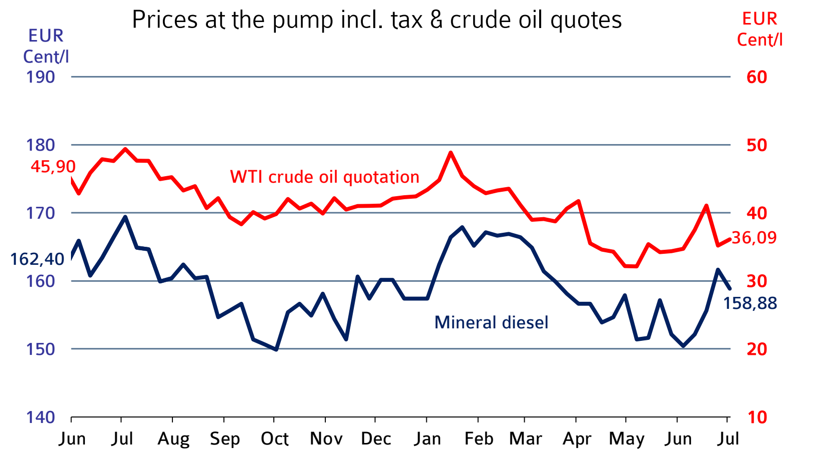
Rapeseed expeller

Prices for rapeseed expeller fob North-East Germany declined further, with demand generally subdued and supply from oilmills limited. This situation is expected to persist until the 2025 harvest is brought in, because rapeseed stocks are dwindling. In contrast, contract activity strengthened somewhat, particularly as buyers from Scandinavia secured supply through the end of the year.

Biodiesel/ mineral Diesel



Note: Diesel for use in agriculture partially taxed, from 1 March 2024 at 34.16 cents/l incl. CO2 pricing, rapeseed oil and biodiesel fully taxed at 47.04 cents/l excl. CO2 pricing, all prices excl. transport costs.



Note: Mineral diesel incl. VAT

Wholesale prices

The biodiesel market remained stagnant in June. Demand continued to trend against zero. Physical blending remained largely uncompetitive due to an oversupply of GHG quotas in the mineral oil sector.

However, developments in the crude oil market caused some price movements over the month. It is hoped that the economy - and consequently, fuel consumption - will pick up pace following the implementation of new measures by the new Federal Government.

Prices at the pump

Crude oil prices fluctuated significantly in June. The situation in the Middle East caused a sharp rise in the first half of the month. Israel launched airstrikes on targets in Iran. Iran, in turn, responded with airstrikes on Israeli towns and infrastructure facilities. These events fueled concerns about potential supply interruptions, sending prices rocketing. However, following US intervention and a brokered ceasefire agreement, prices soon dropped sharply.

Demand

Biodiesel/Bioethanol

Notice from the responsible body – Federal Office for Economic Affairs and Export Control (BAFA):

BAFA has temporarily suspended the publication of monthly consumption figures.

The UFOP will resume publishing and commenting on monthly consumption volumes once reporting is restarted.