

# UFOP Market Information

## Oilseeds and Biofuels

### Contents

#### Producer prices

#### Wholesale prices..... 2

Rapeseed

Rapeseed oil, palm oil

Rapeseed meal

Rapeseed expeller

#### Fuels..... 3

Wholesale prices

Prices at the pump

Fuel consumption

#### Highlights .....4ff.

### Price trends

Mean price	Week 35	Previous week	Trend
<b>Producer prices in EUR/t</b>			
Rapeseed	444,00	441,00	↗
<b>Wholesale prices in EUR/t</b>			
Rapeseed	460,00	455,00	↗
Rapeseed oil	1130,00	1125,00	↗
Rapeseed meal	221,00	231,00	↘
Rapeseed cake*	270,00	280,00	↘
Rapeseed future	476,00	472,00	↗
<b>Wholesale prices in ct/l, excl. VAT</b>			
Biodiesel	167,02	167,34	↘
<b>Consumer prices in ct/l incl. VAT</b>			
Diesel	153,90	152,83	↗
<b>Futures in US-\$/barrel</b>			
WTI, Nymex	64,35	70,00	↘

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

### Market Headlines

#### Oilseeds

- Trading on the rapeseed market was slow, focussing on the settlement of existing contracts.
- The 2025 rapeseed harvest was nearly complete with large variations in yield between regions; rapeseed sowing began concurrently.
- US soybean prices trended upward, driven by expectations of rising demand from the US biofuels industry for soybean oil.

#### Oilseed meals and oilcakes

- Rapeseed meal decreased significantly in value; regional supply was mixed.
- Soybean meal lacked clear price direction.

#### Vegetable oils

- Rapeseed oil prices rose well above the previous month, following some fluctuations, while demand did not pick up until month-end.
- Palm oil recorded further gains, supported by brisk Malaysian exports.

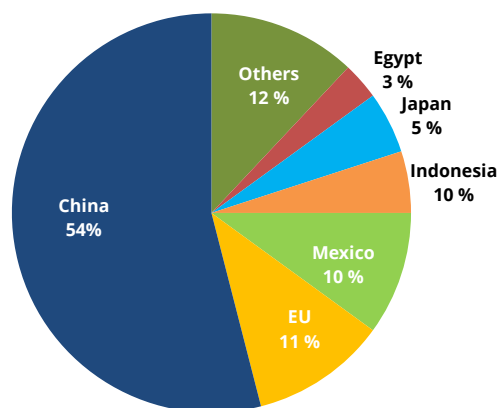
#### Fuels

- The biodiesel market remained seasonally calm.
- Crude oil prices slumped, weakened by geopolitical risks and expectations of excess supply.

### Chart of the week

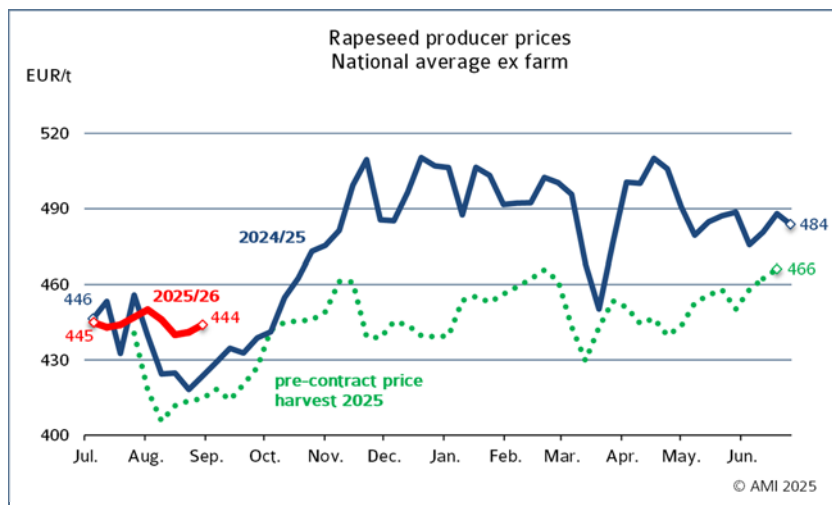
#### US soybean exports by destination

Shares in per cent, 2023/24



Source: USDA, FAS, ASA

# Market prices

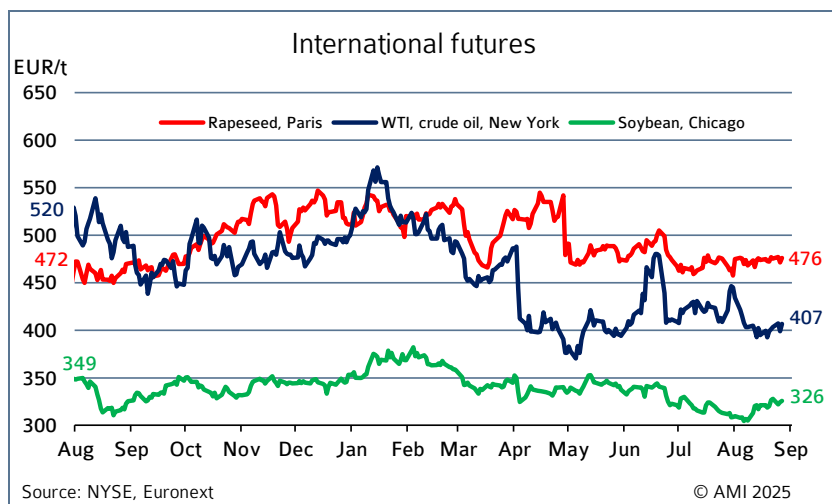
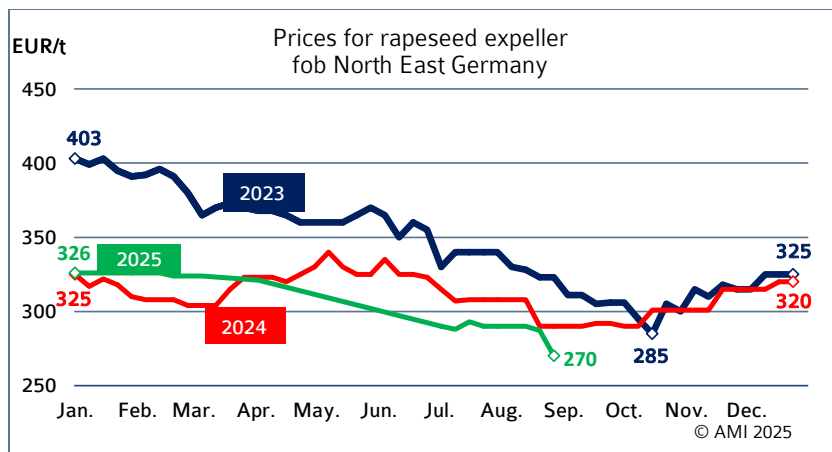


## Wholesale prices

in EUR/t on 27.08.2025, (collected at mills and trade)

	Rapeseed 2025 franko	Rapeseed fob	Rapeseed oil fob	Palmoil cif
Spot	460	221	1130	1150
Previous week	455	231	1125	1165

Source: AMI



## Rapeseed

The German rapeseed harvest was essentially complete by the end of August, but yields varied greatly between regions. In some areas, such as Mecklenburg-Western Pomerania, yields ranged from very low to very good, with significant differences also observed in oil content. Notably, many locations reported unusually high moisture levels. In many places, rapeseed sowing began while harvesting was still ongoing. However, sowing conditions proved difficult due to insufficient soil moisture levels. This lack of moisture could negatively affect crop development in the medium term. Trade in rapeseed picked up somewhat toward the end of the month. However, the focus remained on settling existing contracts. Additional rapeseed is currently being sourced from Romania, where the harvest was significantly larger than the past year. Market participants generally expect little price movement before year-end.

## Rapeseed oil

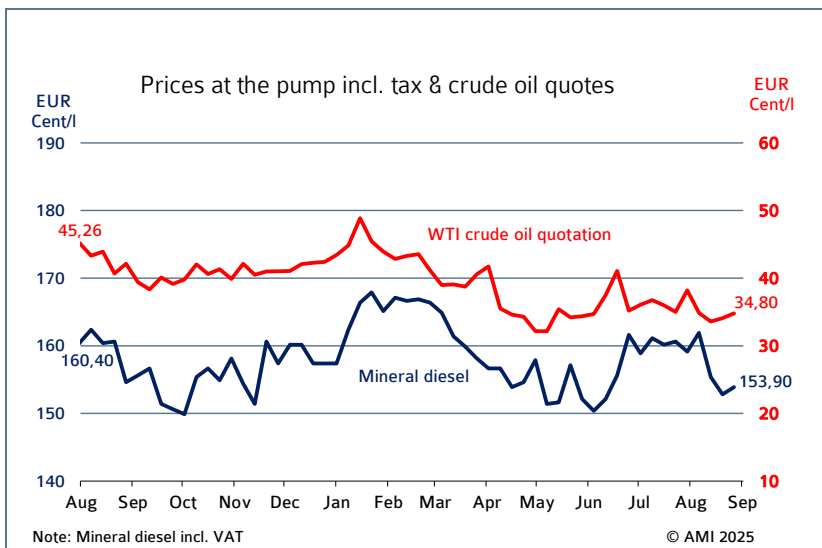
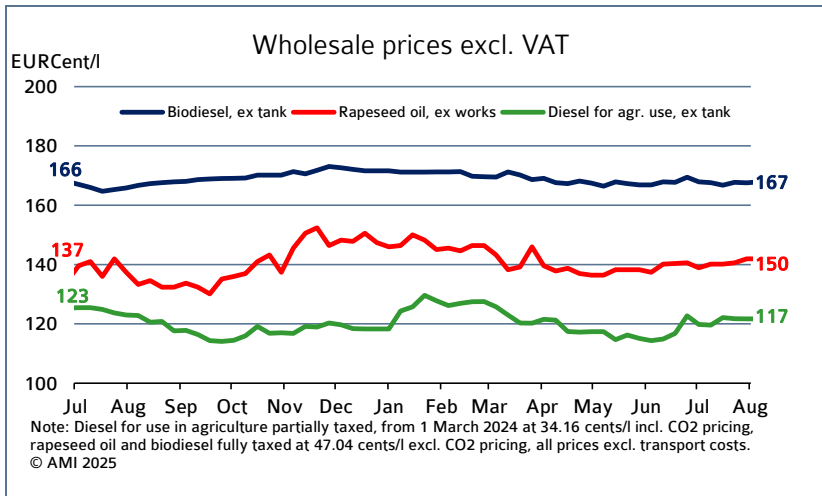
At the beginning of the month, buyers on the German rapeseed oil market were cautious. Although there was some interest, the market conditions were not acceptable. Over the course of the month, margins improved, especially in the biodiesel sector, leading to a slight increase in demand. Buyers mainly placed orders for the fourth quarter of 2025, with some also covering needs for the second quarter of 2026. Meanwhile, supply increased due to the harvest progress at the international level.

## Rapeseed expeller

Prices for rapeseed expeller fob North-East Germany continued to decline. The lower price level attracted more buyers, who took advantage of the favourable conditions to build up stocks. However, on the supplier side, the focus remained on fulfilling existing contracts rather than securing new business. The willingness of oil mills to sell varied regionally in August. In the north, bids were sometimes scarce, while in the east, an increasing number of batches for August and September delivery were offered.

Nevertheless, a wide price spread between delivery dates persisted, particularly between spot supplies and deliveries scheduled from November onwards.

# Biodiesel/ mineral Diesel



## Wholesale prices

The sluggish summer phase continued on the German biodiesel market, with only few players active. New business remained largely absent, and demand for physical blending remained low. Accordingly, biodiesel prices showed little movement, though they weakened slightly in response to a decline in crude oil prices of approximately 8.4 per cent over the month.

## Prices at the pump

Geopolitical risks put further downward pressure on crude oil prices. Alongside the war in Ukraine, aggressive US tariff policies created additional uncertainty. As of the end of August, punitive tariffs of 25 per cent have been imposed on India, doubling the total duties on oil imports from India to 50 per cent. Since India is one of the main importers of Russian crude oil, this could impact global trade flows. Another key concern is political instability in the US. Interference by the US government in central bank policy, along with the unexpected dismissal of a Federal Reserve official, has dampened market sentiment. Prices were also weighed down by expectations of a global crude oil surplus in 2025 as OPEC+ and non-member countries such as the US have increased their oil output.

## 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. At the request of UFOP, the BAFA announced that it would resume publishing the monthly report starting in September.