

UFOP Market Information

Oilseeds and Biofuels

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Highlights4ff.

Market Headlines

Oilseeds

- Trading on the rapeseed market was on hold, as market participants stayed reluctant.
- The 2025 rapeseed harvest was interrupted by rainfall across Germany.
- US soybean prices were firmly influenced by weather markets, with favourable US weather conditions putting prices under pressure.

Oilseed meals and oilcakes

- Rapeseed meal prices declined over the month.
- Soybean meal lacked clear price direction.

Vegetable oils

- Rapeseed oil prices were exceptionally firm, but trading activity was limited.
- Palm oil prices benefited from improved competitive positioning.

Fuels

- Biodiesel market remained at a standstill.
- Crude oil prices rose sharply at month-end as situation in the Middle East escalated.

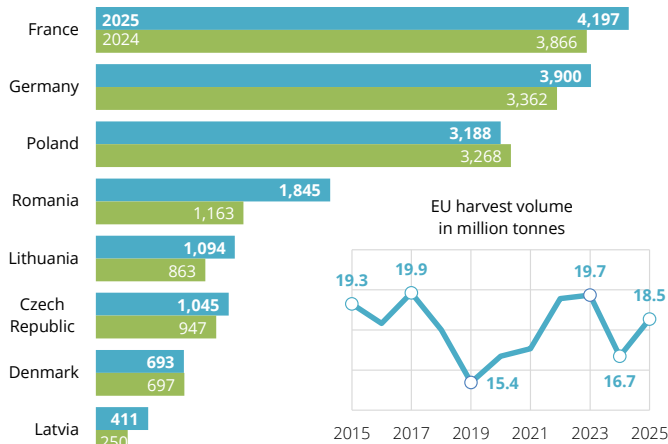
Price trends

Mean price	Week 31	Previous week	Trend
Producer prices in EUR/t			
Rapeseed	450,00	447,00	↗
Wholesale prices in EUR/t			
Rapeseed	471,00	463,00	↗
Rapeseed oil	1045,00	1030,00	↗
Rapeseed meal	246,00	246,00	→
Rapeseed cake*	290,00	290,00	→
Rapeseed future	465,00	476,50	↘
Wholesale prices in ct/l, excl. VAT			
Biodiesel	167,55	167,71	↘
Consumer prices in ct/l incl. VAT			
Diesel	159,15	160,65	↘
Futures in US-\$/barrel			
WTI, Nymex	68,38	65,45	↗

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

Chart of the week

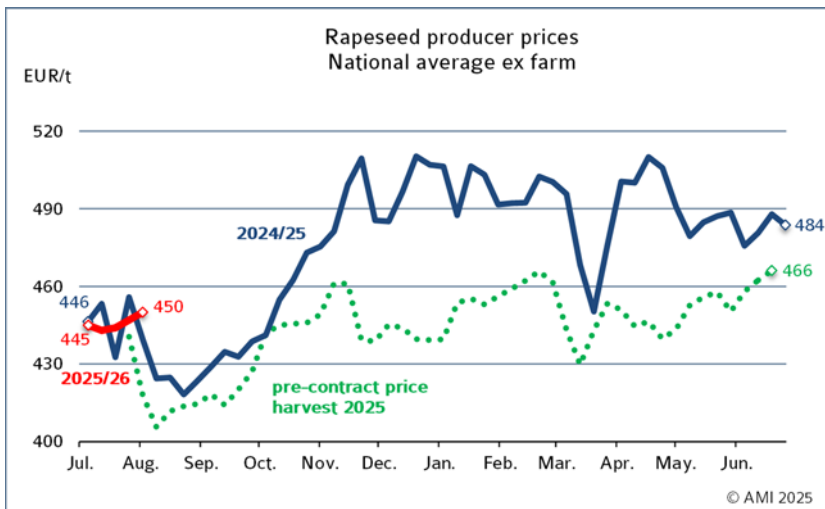
Rapeseed harvests in key EU countries
in 1,000 tonnes



Source: EU Commission, AMI

Note: 2025 forecast

Market prices

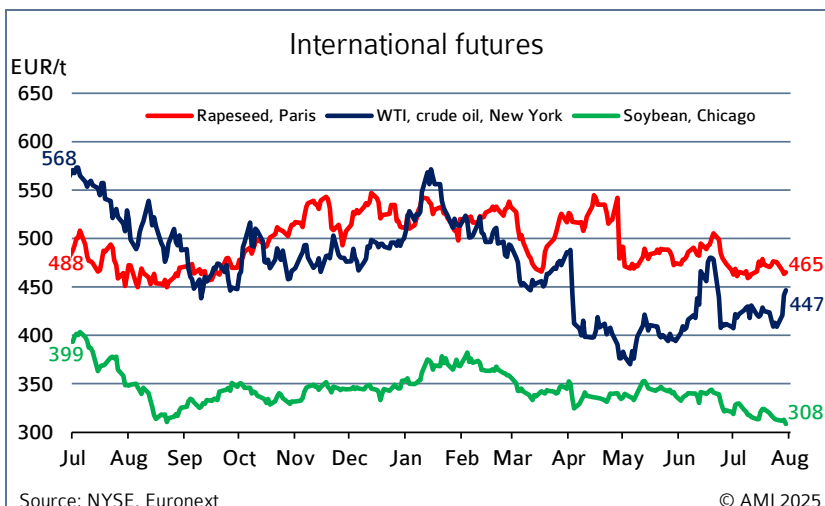
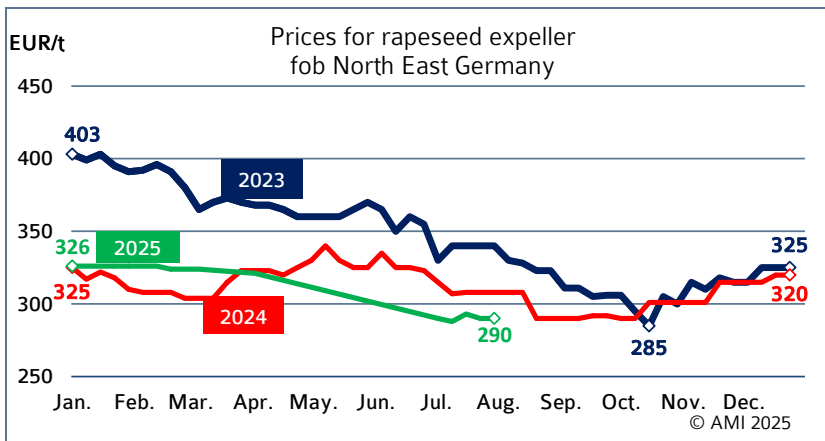


Wholesale prices

in EUR/t on 30.07.2025, (collected at mills and trade)

	Rapeseed 2025 franko	Rapeseed fob	Rapeseed oil fob	Palmoil cif
Spot	471	246	1045	1158
Previous week	463	246	1030	1095

Source: AMI



Rapeseed

Despite pressure from the ongoing harvest, July rapeseed prices on the German market remained steady. Marketing only played a secondary role. Producers focused primarily on harvesting and showed little interest in trading. Most oil mills also adopted a wait-and-see stance.

Meanwhile, persistent rain across Germany hampered the progress of harvest operations. Despite these challenges, rapeseed yield reports were encouraging. In Eastern Germany, yields were in a satisfactory range between 35 and 40 decitonnes per hectare, whereas some areas reported yields as low as 30 decitonnes per hectare. Quality has also been quite promising: oil content in early batches has ranged between 43 per cent and 45 per cent, slightly higher than last year's level. It remains to be seen how the harvest will develop under the current unstable weather conditions.

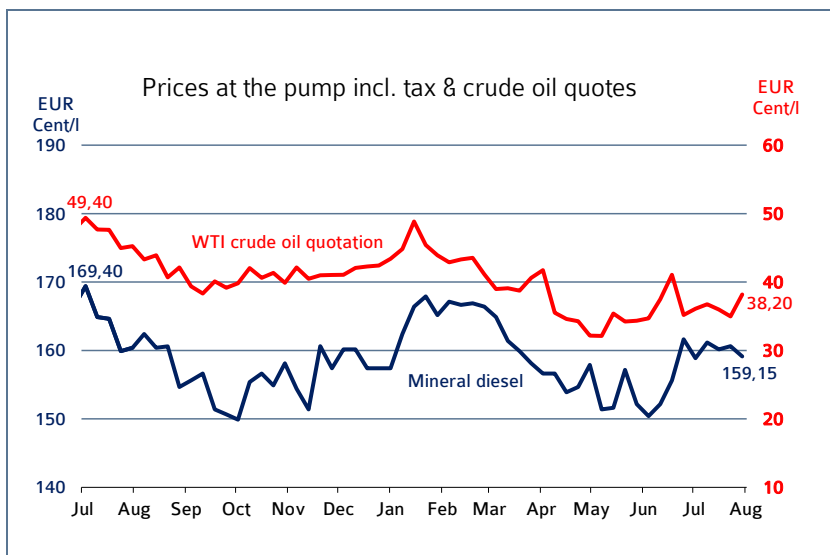
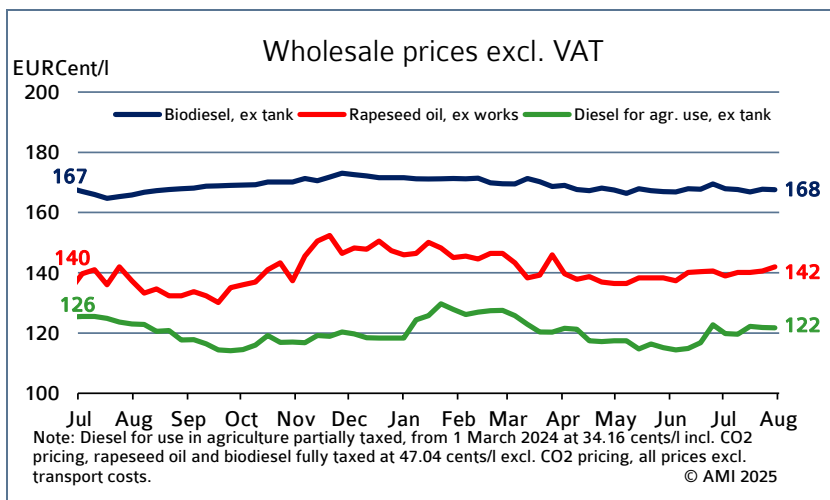
Rapeseed oil

The rapeseed oil market remained quiet in July. Notwithstanding restrained demand, wholesale prices strengthened. Support came from strong feedstock prices and a significant rise in crude oil prices as the month ended. The rise was driven by the latest developments between Russia and the US. While these developments had little impact on rapeseed prices, they pushed up prices for oil as a by-product.

Rapeseed expeller

Prices for rapeseed expeller fob North-East Germany strengthened over the month, but declined more recently. This drop in price stimulated trading activity, especially at the end of July. The lower price level encouraged feed compounders and traders to make stock-up purchases. However, prices varied between regions because of differences in supply, as availability was very limited in some areas. Price levels also varied widely depending on delivery dates.

Biodiesel/ mineral Diesel



Wholesale prices

Biodiesel prices continued to receive support from firming crude oil prices, but showed little overall movement. In effect, the German biodiesel market remained largely unchanged. Physical blending was still considered to be less competitive than the purchase of CO₂ certificates. Nonetheless, there was temporary interest in deliveries for the first quarter of 2026.

Prices at the pump

Crude oil prices ended the month on a high, still primarily driven by geopolitical tensions and developments in trade policy. Specifically, the US government once again increased pressure on Russia, shortening the deadline for potential punitive tariffs on imports from countries still buying Russian oil to ten to twelve days. A resulting reduction of Russian oil exports – for example to China or India – could create supply shortages and drive prices even higher.

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.