

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

Highlights4ff.

Market Headlines

Oilseeds

- Rapeseed prices extended their gains; pre-contract prices were firm.
- High volatility and rising freight costs curbed new business, with trading activity remaining moderate.
- US planting schedules and requirements for biofuels drove soybean prices in the US.

Oilseed meals and oilcakes

- Rapeseed meal prices rose.
- Conventional soya meal was caught between record harvests and geopolitical uncertainties.

Vegetable oils

- Rapeseed oil edged up on the back of higher feedstock quotations.
- Palm oil climbed to the top of the price ranking.

Fuels

- Biodiesel increased on the back of strong crude oil prices.
- Crude oil rose sharply, conflict in the Middle East remained in focus.

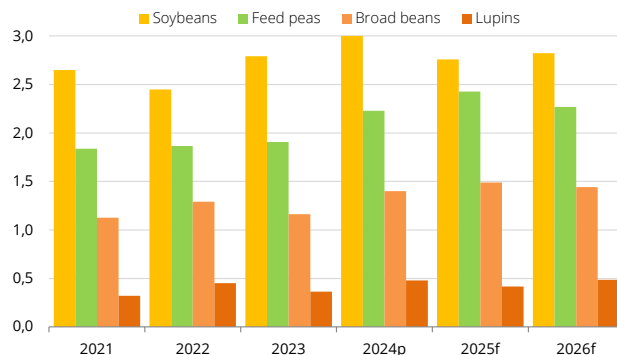
Price trends

Mean price	Week 14	Previous week	Trend
Producer prices in EUR/t			
Rapeseed	479,38	475,30	↗
Wholesale prices in EUR/t			
Rapeseed	520,00	502,00	↗
Rapeseed oil	1120,00	1100,00	↗
Rapeseed meal	251,00	246,00	↗
Rapeseed cake*	313,00	313,00	→
Rapeseed future	514,25	500,50	↗
Wholesale prices in ct/l, excl. VAT			
Biodiesel	178,99	178,45	↗
Consumer prices in ct/l incl. VAT			
Diesel	228,90	230,15	↘
Futures in US-\$/barrel			
WTI, Nymex	101,38	92,35	↗

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

Chart of the week

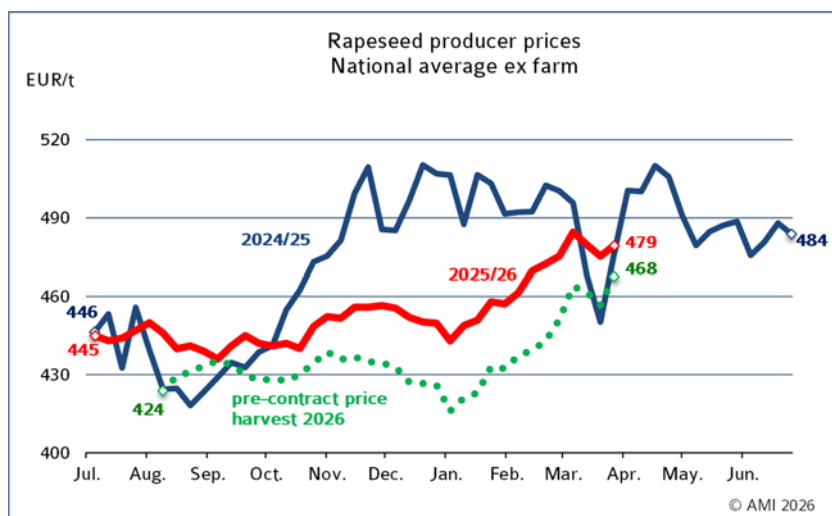
Harvest of the most important legumes in the EU-27 in million tonnes



Source: EU Commission

Note: p = preliminary, f = forecast

Market prices

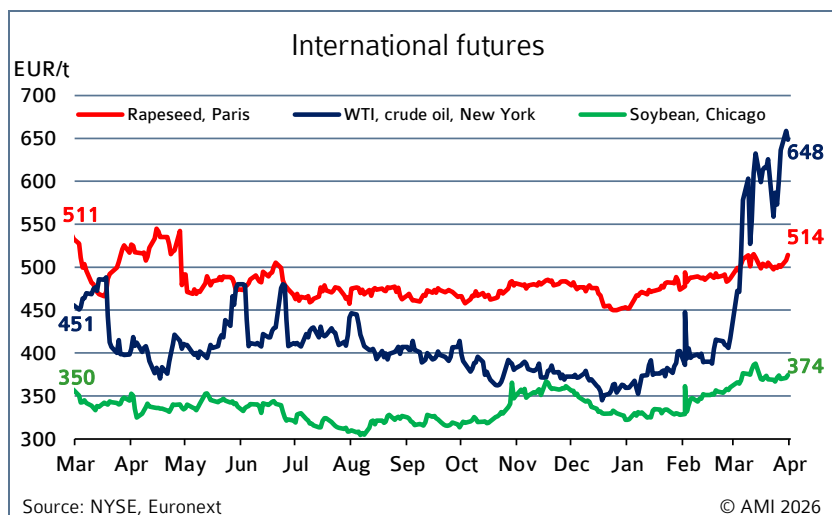
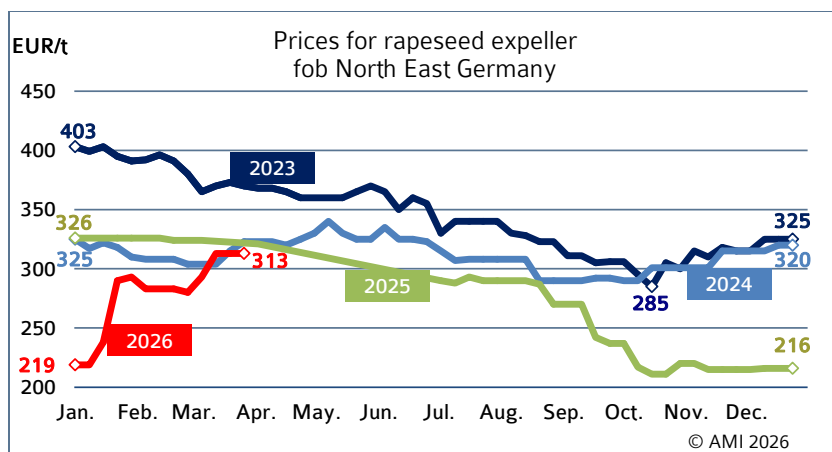


Wholesale prices

in EUR/t on 31.03.2026, (collected at mills and trade)

	Rapeseed 2025 franko	Rapeseed fob	Rapeseed oil fob	Palmoil cif
Spot	520	251	1120	1343
Previous week	502	246	1100	1310

Source: AMI



Rapeseed

In view of the sometimes strong price fluctuations at the Paris stock exchange, trading on the German rapeseed market remained generally limited. Residual stocks from the 2025 crop were virtually non-existent in domestic warehouses in some regions. Marketers also continued to take a cautious approach to marketing the new harvest. Given the Iran conflict and high fertiliser and energy costs, many farmers were waiting for further increases in revenue, as the previous price rises have not yet sufficiently offset rising costs.

Rapeseed oil

On the back of rising feedstock quotations, prices of rapeseed oil continued to increase. Demand picked up briefly at the end of March but then cooled off again. Demand was mainly for rapeseed oil for early delivery dates. This was also reflected regionally by tight availability of raffinade. In contrast, buyers for crude rapeseed oil remained few and far between. Demand from the power sector remained virtually non-existent as the decision on RED III was once again adjourned.

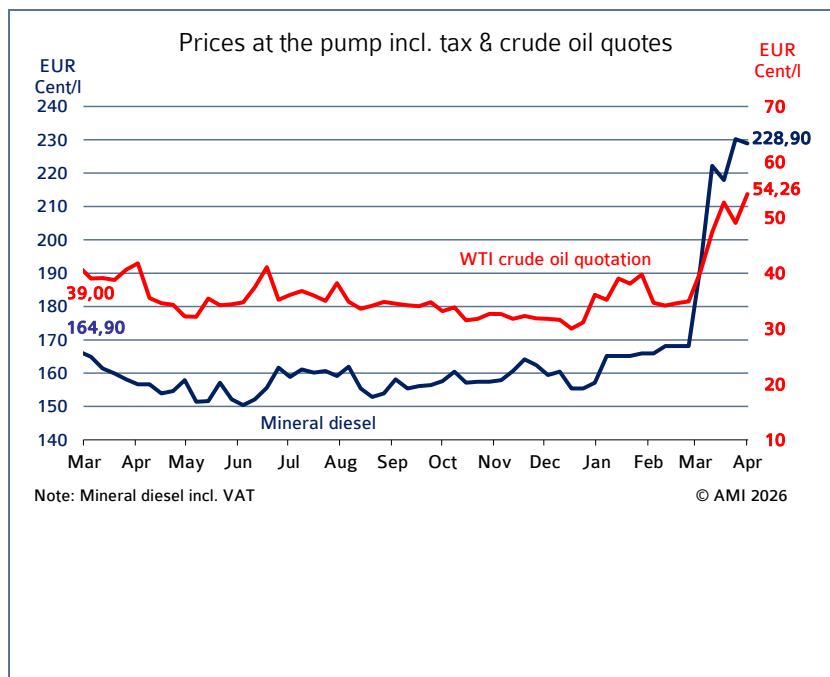
Rapeseed expeller

Prices of rapeseed expeller fob North-East Germany climbed further. Many buyers increasingly secured spot volumes as the month ended, whereas oil mills required additional feedstock volumes – in some cases sourced at low cost from the Czech Republic. At the same time, upcoming maintenance work in June and July stimulated market activity, whereas supply in the east of Germany was significantly more comfortable due to plentiful availability.

Wholesale prices

The fuel market picked up sharply in March, primarily sparked by the war in the Persian Gulf, which has been impacting oil flows through the Strait between Iran and Oman. According to estimates, around a fifth of the world's oil supply is transported through the Strait of Hormuz. However, this increase has only had a modest impact on biodiesel prices.

Biodiesel/ mineral Diesel



Prices at the pump

The Iran conflict continued to cause significant volatility on the international commodities markets, driving prices sharply, in particular those of crude oil. Stock exchange prices temporarily climbed to their highest level since 2022. Uncertainty over potential supply disruptions through the Strait of Hormuz remained high and continued to trigger further price increases. Blocked transport routes and reports of attacks on ships further intensified market jitters. Even the release of strategic reserves of up to 400 million barrels announced by the International Energy Agency has so far only managed to calm the markets temporarily. Experts expect oil prices to remain high for some time to come, even if the war ends quickly, due to ongoing disruptions to strategically important shipping through the Strait of Hormuz and damage to oil and gas facilities in the Persian Gulf.

Demand

(The updated BAFA table was not available at the editorial deadline, therefore the commentary and table corresponding to the 02/2026 report are attached.)

Biodiesel

September use of biodiesel decreased nearly 8 per cent month on month, falling to 187,450 tonnes and remaining 3 per cent below the previous year's figure. The HVO share was around 6,100 tonnes. As, at the same time, consumption of diesel fuel increased just over 9 per cent, biodiesel incorporation in blends decreased 1.0 per cent to 6.3 per cent. In the first nine months of 2024, the use of biodiesel for blending amounted to just under 1.8 million tonnes, which was down around 3 per cent on the same period of the previous year. In contrast, consumption of diesel fuel exceeded the previous year's figure by just over 2 per cent.

Bioethanol

The use of bioethanol dropped to 118,100 tonnes in September, representing an 11 per cent decline compared with the previous month. Use in blends decreased just over 12 per cent, whereas the use in ETBE was up 6 per cent on August. Based on the concurrent surge in petrol consumption, the incorporation rate fell 0.8 per cent to 7.9 per cent. The use of bioethanol in the period from January to September 2025 amounted to 947,800 tonnes, falling just short of the previous year's level.

Domestic consumption in 2025											cumulated	
in 1.000 t	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	2025	2024	
Biodiesel for blending	182,8	217,1	211,2	194,8	183,2	198,6	196,4	202,9	187,5	1.766,3	1.814,0	
of which HVO	9,9	18,0	25,7	11,6	7,6	18,0	11,8	10,3	6,1	118,1	126,1	
Diesel	2.263,6	2.335,4	2.686,6	2.678,8	2.572,0	2.344,3	2.787,0	2.561,5	2.803,6	23.049,5	22.524,0	
Biodiesel + diesel	2.446,4	2.552,4	2.897,8	2.873,6	2.755,2	2.542,9	2.983,4	2.764,4	2.991,0	24.815,7	24.338,0	
Share biodiesel	7,5	8,5	7,3	6,8	6,6	7,8	6,6	7,3	6,3	7,1	7,5	
Bioethanol ETBE a)	8,2	5,6	7,6	6,5	5,6	6,1	6,9	8,6	9,2	64,3	72,0	
Bioethanol for blending	86,0	116,9	93,5	86,3	99,0	95,4	101,7	124,3	108,9	883,5	878,5	
Bioethanol total	94,2	122,5	101,2	92,8	104,6	101,5	108,6	132,9	118,1	947,8	950,5	
Gasoline	1.329,1	1.217,1	1.356,9	1.409,5	1.455,9	1.165,8	1.495,2	1.376,9	1.384,7	12.222,5	12.283,1	
Gasoline + bioethanol	1.423,3	1.339,6	1.458,0	1.502,3	1.560,5	1.560,5	1.603,9	1.509,8	1.502,8	13.170,3	13.233,6	
Share bioethanol	6,6	9,1	6,9	6,2	6,7	6,7	6,8	8,8	7,9	13170,3	13233,6	
light heating oil	803,2	809,1	925,8	851,8	920,5	815,0	780,5	678,8	916,3	7503,2	7689,6	

Note: biodiesel= FAME, HVO, BTL; a) Volume percent of bioethanol in ETBE = 47 %; cumulated figures include (unpublished) revised monthly BAFA data.
Source: Federal Office for Economic Affairs and Export Control, AMI.