

UFOP Market Information

Oilseeds and Biofuels

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Highlights4ff.

Price trends

Mean price	Week 18	Previous week	Trend
Producer prices in EUR/t			
Rapeseed	492,77	484,40	↗
Wholesale prices in EUR/t			
Rapeseed	561,00	519,00	↗
Rapeseed oil	1122,00	1165,00	↘
Rapeseed meal	304,00	296,00	↗
Rapeseed cake*	325,00	313,00	↗
Rapeseed future	596,50	522,25	↗
Wholesale prices in ct/l, excl. VAT			
Biodiesel	178,41	178,03	↗
Consumer prices in ct/l incl. VAT			
Diesel	215,65	221,15	↘
Futures in US-\$/barrel			
WTI, Nymex	106,88	92,96	↗

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

Market Headlines

Oilseeds

- Rapeseed prices remained volatile with a general upward trend.
- Most of the old crop was marketed, with increased forward contracting of parts of the 2026 crop in some regions.
- Rapid sowing in the US and abundant supply of soybeans from South America limited scope for upward price movements.

Oilseed meals and oilcakes

- Spot rapeseed meal climbed above EUR 300 per tonne.
- Prices of conventional soybean meal remained firm, supported by logistical and regulatory challenges.

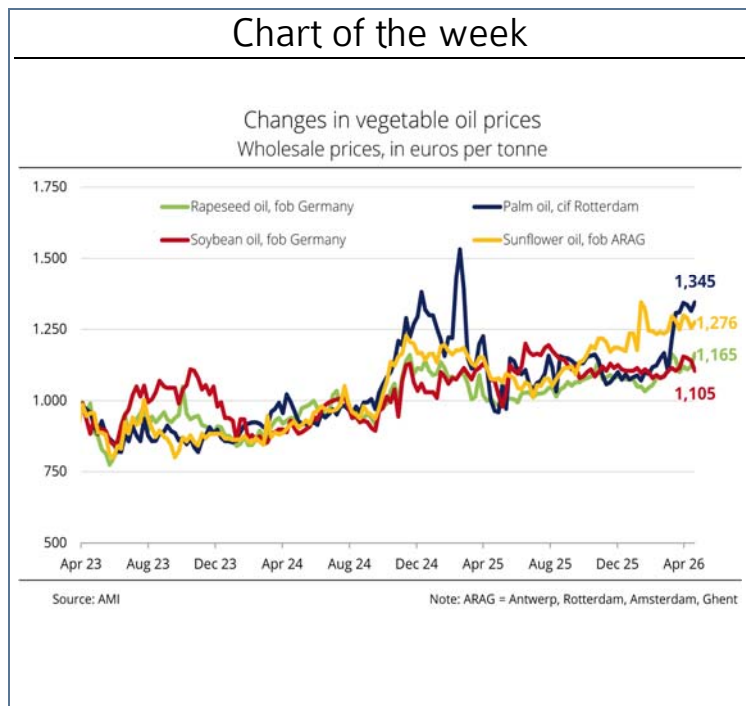
Vegetable oils

- Rapeseed oil trended upward, with the energy market setting the direction.
- Palm oil found itself caught between Southeast Asia's biodiesel policy and abundant supply.

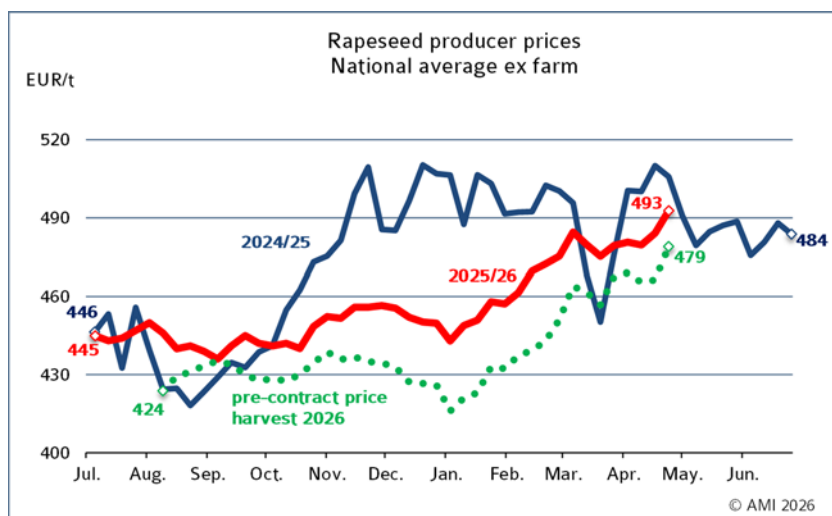
Fuels

- Biodiesel market was largely driven by expectations regarding the implementation of RED III.
- The Strait of Hormuz remained the key driving force in the crude oil market.

Chart of the week



Market prices



Rapeseed

The rapeseed market remained generally calm. The old crop was largely marketed, with only small residual stocks remaining in producers' hands. Consequently, attention increasingly turned to the new crop, bringing forward contracts back to the fore in particular. In some regions, contracts were already being signed for parts of the 2026 crop, while producers elsewhere remained cautious due to high input costs. Most rapeseed crops on the fields were in good to satisfactory condition. In many places, they were in bloom or even in full bloom.

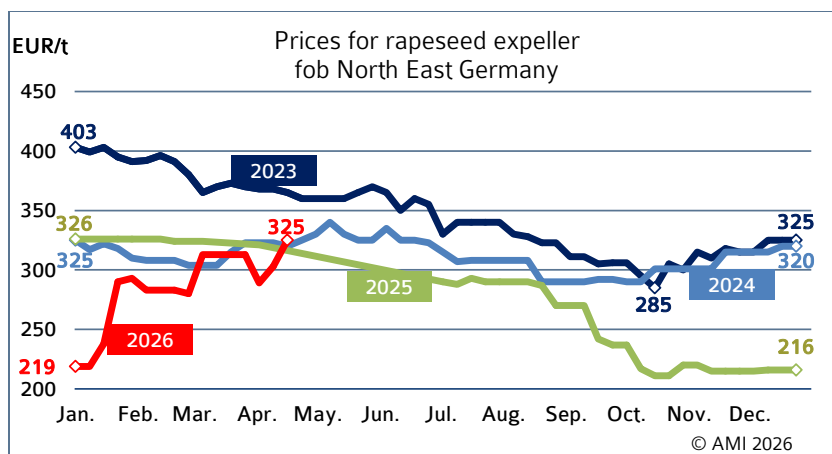
Wholesale prices
in EUR/t on 29.04.2026, (collected at mills and trade)

	Rapeseed 2025 franko	Rapeseed fob	Rapeseed oil fob	Palmoil cif
Spot	561	304	1122	1342
Previous week	519	296	1165	1345

Source: AMI

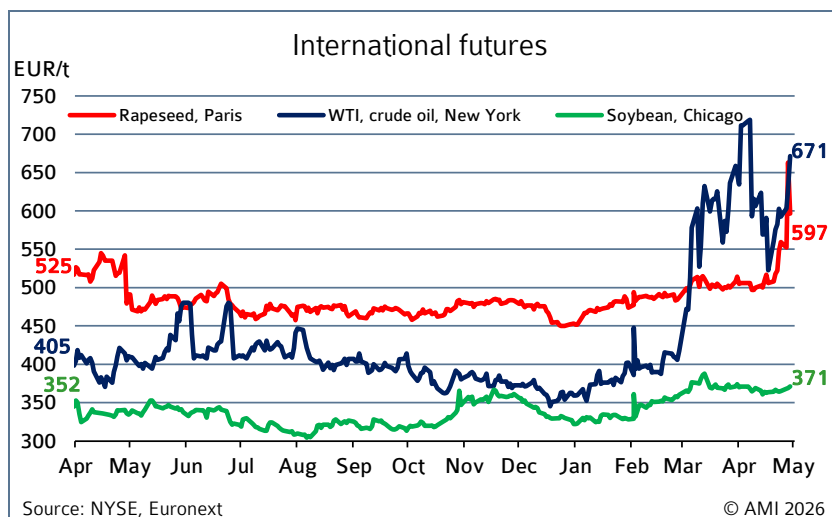
Rapeseed oil

Rapeseed oil prices edged up in line with firm feedstock quotations. Despite continuously rising prices, demand remained muted. The increasingly tight supply - especially of rapeseed oil raffinate - failed to stimulate further purchases. The Middle East conflict remained at the focus of market players' attention. New statements from the US government repeatedly provoked definite responses in crude oil markets, which had a knock-on effect on rapeseed oil prices.



Rapeseed expeller

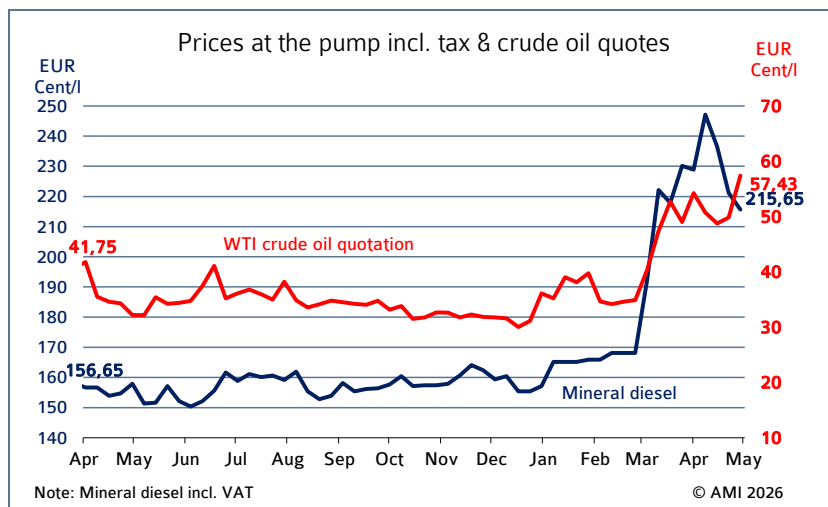
Prices of rapeseed expeller fob North-East Germany firmed notably in April, recently climbing above the mark of EUR 320 per tonne. With regard to the coming season, market players remained cautious, taking a wait-and-see stance. Meanwhile, logistics remained a major issue.



Wholesale prices

In the biodiesel market, attention was focused primarily on the Bundestag's decision regarding the implementation of RED III. Noteworthy points include the GHG quota obligation being raised to 65 per cent by 2040, the gradual increase in the cap on biofuels from cultivated biomass from 4.4 per cent currently to 5.8 per cent by 2033, and the retroactive abolition of double counting as of 1 January 2026. However, the desired effect on biodiesel producers' rapeseed oil sales has so far failed to materialise.

Biodiesel/ mineral Diesel



Prices at the pump

The crude oil market remained strongly driven by political decisions. The main focus was on the Strait of Hormuz: restrictions on ship traffic and US countermeasures fuelled concerns about supply disruptions and drove up the risk premium. Prices were also driven by the US government's recent comments on Iran, as well as dampened expectations of a swift de-escalation in the dispute over the Strait of Hormuz. Additional fundamental support came from the US: a significantly sharper-than-expected drop in crude oil stocks and falling ending stocks of petrol and distillate drove prices higher.

Demand

Biodiesel

At 182.230 tonnes, December 2025 consumption of biodiesel remained just below the previous month's level of 184,750 tonnes but exceeded the historically low previous year's level by 125 per cent. The volume of HVO amounted to approximately 7,840 tonnes, more than doubling from November 2025. As, at the same time, consumption of diesel fuel increased marginally, the biodiesel incorporation rate declined 0.2 percentage points to 6.6 per cent. In the 2025 calendar year, the use of biodiesel for blending totalled just under 2.2 million tonnes, which was nevertheless up around 12 per cent on the same period a year earlier. The increase in the use of diesel fuel was less pronounced. At 31.2 million tonnes, it exceeded the previous year's level by just over 2 per cent.

Bioethanol

December 2025 use of bioethanol increased 9 per cent on the previous month to around 126,500 tonnes. The use in blends rose just over 8 per cent, whereas use in ETBE increased almost 18 per cent compared with November. In the period from January to December 2025, consumption of bioethanol totalled 1.3 million tonnes, representing a 4 per cent decline compared with the previous year's level. Consumption figures for petrol fuels were not available as of 4 May 2026.

Domestic consumption in 2025													cumulated	
in 1.000 t	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	2025	2024
Biodiesel for blending	181,4	214,9	209,8	192,7	190,1	194,3	193,8	179,0	186,2	195,7	184,8	182,2	1.766,3	1.814,0
of which HVO	8,7	15,8	24,3	9,5	6,5	13,7	9,7	9,1	4,9	5,2	3,6	7,8	118,1	126,1
Diesel	2.212,1	2.292,2	2.805,2	2.697,5	2.563,0	2.351,7	2.798,4	2.635,2	2.807,5	2.781,8	2.546,0	2.583,9	23.049,5	22.524,0
Biodiesel + diesel	2.393,5	2.507,1	3.015,0	2.890,2	2.753,0	2.546,0	2.992,2	2.814,2	2.993,7	2.977,5	2.730,8	2.766,1	24.815,7	24.338,0
Share biodiesel	7,6	8,6	7,0	6,7	6,9	7,6	6,5	6,4	6,2	6,6	6,8	6,6	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	6,8	6,1	7,2	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	117,6	110,5	119,4	883,5	878,5
Bioethanol total	94,2	122,5	101,2	92,8	104,6	101,5	108,6	132,9	118,1	124,4	116,6	126,5	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	802,3	809,9	926,5	852,1	919,6	815,9	778,9	682,0	915,0	998,3	998,3	948,9	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.