

UFOP Market Information

Oilseeds and Biofuels

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Market Headlines

Oilseeds

- Rapeseed prices proved robust at the producer level.
- Willingness to sell remained moderate in view of the disappointing harvest and the limited surplus.
- US soybean prices came under pressure at month-end as soybeans were excluded from US-China tariff compromise.

Oilseed meals and oilcakes

- Rapeseed meal strengthened, as tight availability combined with ample demand.
- Prices of soya meal increased further.

Vegetable oils

- Rapeseed oil was mostly firm over the month.
- Palm oil prices weakened temporarily, while demand within Europe continued to wane.

Fuels

- Biodiesel prices eased towards month-end.
- Crude oil prices remained volatile; an improved supply situation from Saudi Arabia contrasted with new attacks on tankers in the Persian Gulf.

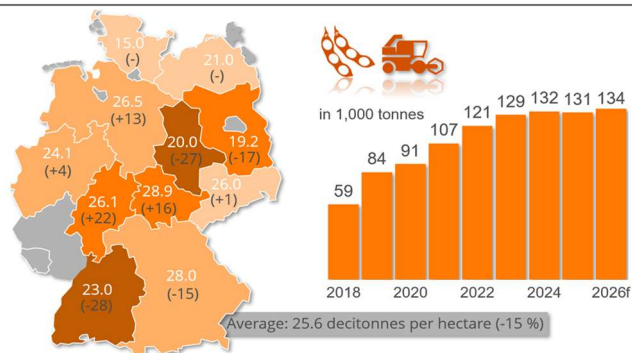
Price trends

Mean price	Week 40	Previous week	Trend
Producer prices in EUR/t			
Rapeseed	518,84	525,97	↘
Wholesale prices in EUR/t			
Rapeseed	547,00	555,00	↘
Rapeseed oil	1220,00	1245,00	↘
Rapeseed meal	293,00	293,00	→
Rapeseed cake*	316,00	310,00	↗
Rapeseed future	536,75	554,00	↘
Wholesale prices in ct/l, excl. VAT			
Biodiesel	186,09	186,31	↘
Consumer prices in ct/l incl. VAT			
Diesel	255,40	255,90	↘
Futures in US-\$/barrel			
WTI, Nymex	90,42	92,16	↘

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

Chart of the week

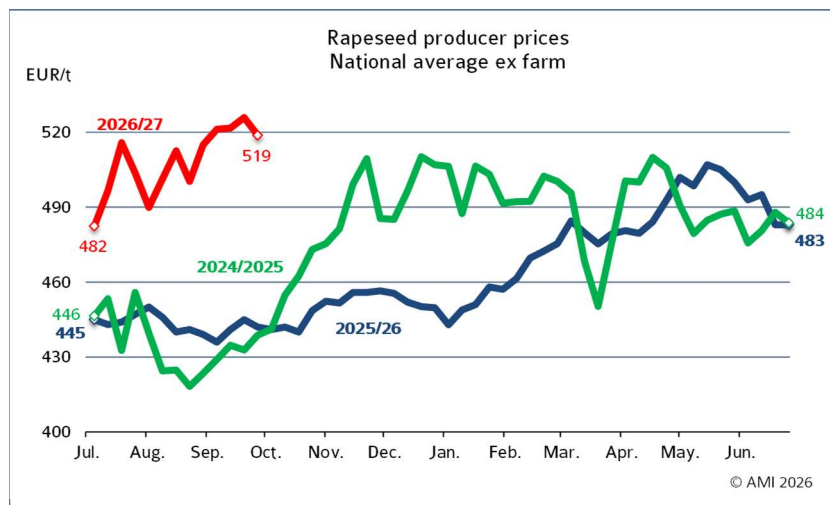
Soybean yields in Germany
2026 estimate, in decitonnes per hectare, changes compared to 2025 in %



Source: Destatis

Note: f = forecast

Market prices

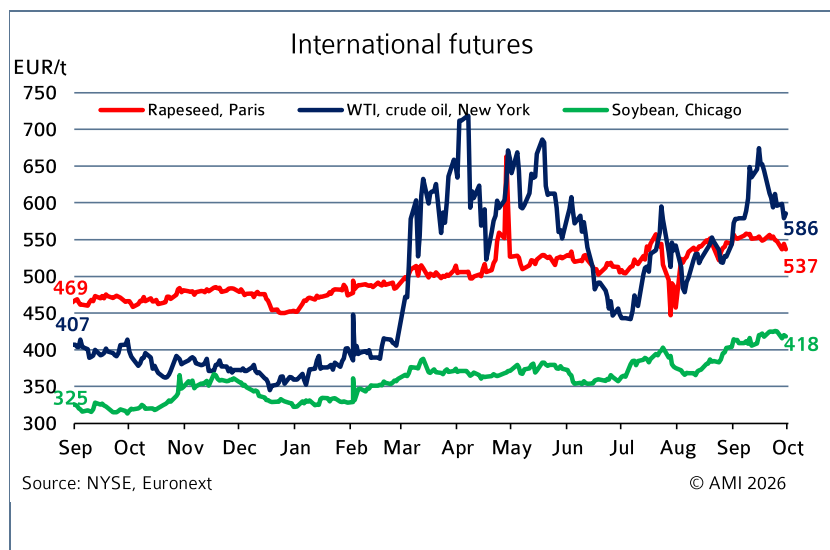
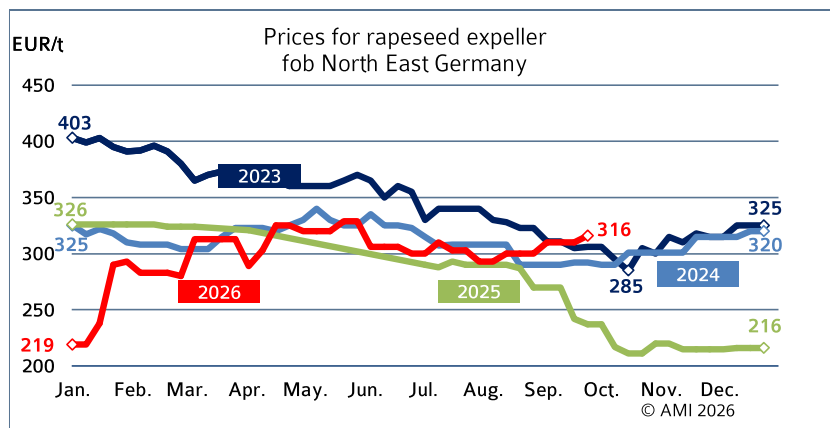


Wholesale prices

in EUR/t on 30.09.2026, (collected at mills and trade)

	Rapeseed 2026 franko	Rapeseed fob	Rapeseed oil fob	Palmoil cif
Spot	547	293	1220	1317
Previous week	555	293	1245	1240

Source: AMI



Rapeseed

Decreasing crude oil prices and hopes for diplomatic progress in the Middle East weighed on rapeseed prices in Paris in September. In Germany, producer prices remained sound despite the disappointing harvest. However, trade did hardly support this trend. Despite the attractive price level, farmers' inclination to sell remained low - if nothing else, because of the limited availability of rapeseed available for free sale. In some cases initial forward contracts for the 2027 crop were already being discussed. Meanwhile, the development of the new rapeseed crop came increasingly into focus. Whereas seed emergence in Schleswig-Holstein was good with control of snails and cabbage stem flea beetles ongoing, concerns regarding the continued drought in various regions of south and south-west Germany were growing.

Rapeseed oil

Wholesale prices for rapeseed oil edged up in September, but lost ground towards month-end. Market participants acted with restraint, observing further developments. Interest from the power sector continued to be limited to the spot market. In addition, logistics issues drove prices down as oil mills could not operate at full capacity due to the low water levels in rivers. Due to already restrained demand, supply nevertheless remained more than adequate.

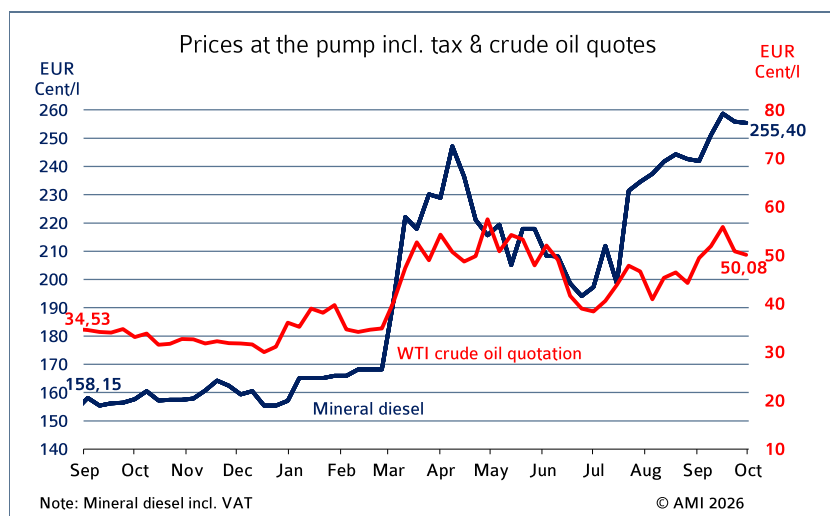
Rapeseed expeller

Prices of rapeseed expeller fob North-East Germany strengthened in September. At EUR 316 per tonne, the latest price was approximately EUR 16 per tonne higher than at the end of August. Availability in the east of the country was generally considered to be sufficient. However, supply in the west was different. Due to the continued low water levels along the Rhine, availability remained limited. Those looking for supplies had to expect higher prices. At the same time, demand remained brisk, both in Germany and abroad.

Wholesale prices

In September, too, crude oil price developments determined the price trends on the biodiesel market. The price for spot standard biodiesel was reported at approximately 185.3 euro cents per litre at the end of September, representing a decline of 1 euro cent per litre compared with four weeks earlier.

Biodiesel/ mineral Diesel



Prices at the pump

Contradictory signals from the Middle East shaped the crude oil market in September as well. On the one hand, setbacks in endeavours to reach a diplomatic solution to the war in Iran lent support to prices. New attacks on several tankers in the Strait of Hormuz recently also fuelled concerns regarding the security of supply. On the other hand, growing delivery volumes from Saudi Arabia put a damper on prices. According to recent reports, the volume of oil transported through the East-West Pipeline increased to at least 3.5 million barrels per day.

Demand

Biodiesel

July 2026 consumption of biodiesel for blending declined 9.1 per cent from the previous month to 237,870 tonnes. However, in July 2025, consumption was around 22.1 per cent lower at 194,760 tonnes. Since at the same time consumption of diesel fuel decreased more strongly – 16 per cent to approximately 2.2 million tonnes – the incorporation rate nevertheless increased 0.7 percentage points to 9.6 per cent compared with June. In other words, the use of biodiesel for blending in the first seven months of 2026 amounted to around 1.6 million tonnes, which was up around 21.4 per cent on the same period last year. By contrast, consumption of diesel fuel, at 16.2 million tonnes, fell around 8.9 per cent below the previous year's volume.

Bioethanol

July 2026 use of bioethanol decreased 1.0 per cent from the previous month to around 111,810 tonnes. The share of ETBE showed an increase of 28.2 per cent to 12,100 tonnes compared with the previous month, whereas the use for blending purposes dropped approximately 3.6 per cent to 99,700 tonnes. The use of pure motor gasoline fell 9.6 per cent, which means that the overall incorporation rate of bioethanol and ETBE nevertheless increased 0.6 per cent to 7.6 per cent in July 2026.

Domestic consumption in 2026

in 1.000 t

	Jan.	Feb.	Mar.	Apr.	May	June	July	cumulated	
								2026	2025
Biodiesel for blending	173,0	203,3	226,0	267,5	263,6	261,7	237,9	1.638,2	1.349,6
of which HVO	27,6	48,3	58,1	77,7	59,1	66,4	45,8	383,0	78,2
Diesel	2.164,5	2.137,1	2.266,7	2.096,6	2.434,7	2.684,5	2.240,2	16.155,4	17.738,3
Biodiesel + diesel	2.337,5	2.340,4	2.492,8	2.364,2	2.698,3	2.946,2	2.478,1	17.793,6	19.087,9
Share biodiesel	7,4	8,7	9,1	11,3	9,8	8,9	9,6	9,2	7,1
Bioethanol ETBE a)	6,1	7,4	9,6	8,0	10,0	9,5	12,1	62,7	46,3
Bioethanol for blending	80,9	81,9	87,4	98,3	109,2	103,4	99,7	684,0	690,6
Bioethanol total	87,0	89,3	97,1	106,3	119,2	112,9	111,8	746,7	736,9
Gasoline for engines b)	1.219,3	1.226,1	1.201,9	1.297,5	1.465,6	1.504,0	1.359,2	9.252,9	9.478,3
Gasoline for engines + bioethanol	1.306,3	1.315,4	1.299,0	1.403,8	1.584,8	1.616,9	1.471,0	9.999,6	10.215,2
Share bioethanol	6,7	6,8	7,5	7,6	7,5	7,0	7,6	7,5	7,2
light heating oil	883,4	771,6	570,0	374,6	329,6	455,3	448,6	3.851,2	5.897,7

Note: biodiesel= FAME, HVO, BTL; a) Volume percent of bioethanol in ETBE = 47 %;

cumulated figures include (unpublished) revised monthly BAFA data.

b) listed under the name "gasoline" through 2025

Source: Federal Office for Economic Affairs and Export Control, AMI.