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## **Report Name:** Oilseeds and Products Annual

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### **Report Highlights:**

MY2021/22 is characterized by a further reduction in rapeseed production. Total United Kingdom (UK) rapeseed area in MY2021/22 is forecast to decline by 17 percent, primarily due to uncertainty over crop performance. Demand for oilseed meals for livestock feed use is expected to remain at current levels. The reopening of hospitality post COVID-19 is expected to increase the share of oil in food consumption. MY2020/21 should be considered an outlier year, not just because of the weather but also because of the uncertainty of Brexit and the COVID-19 pandemic. With the UK having now completed its departure from the EU, growers and traders alike are making more informed decisions ahead of MY2021/22, albeit COVID-19 could continue to play its part on the demand side.

**Disclaimer:** Effective January 1, 2021, the United Kingdom (UK) completed its departure from the European Union (EU). This report presents Post's first outlook for oilseeds and products, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2021/22, as well as estimates for MY2019/20 and MY2020/21. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the UK and is not official USDA data.

- EU European Union
- FAS Foreign Agricultural Service
- Ha Hectares
- MHa Thousand hectares
- MMT Million Metric Tons
- MT Metric Ton (1000 kg)
- MY Marketing Year
- TMT Thousand Metric Tons
- UK United Kingdom
- U.S. United States

The marketing years used in this report are:

January - December

- Copra complex
- Palm kernel complex
- Palm oil
- Fish meal

July - June

- Rapeseed complex

October - September

- Soybean complex
- Sunflower complex
- Cottonseed complex
- Peanut complex

November - October

- Olive oil

## **Executive Summary**

Total UK rapeseed oilseed production in MY2021/22 is forecast to be 986 thousand metric tons (TMT), 70 TMT lower than MY2021 and nearly 600 TMT lower than MY2019/20. Planting area has reached a 20-year low due to the loss of neonicotinoid pesticides and continued yield issues.

Low domestic rapeseed oilseed production has led to increased imports of oilseed, meal, and oil. There is also an increase in feed substitution in the livestock sector to compensate.

The closure of hospitality as a result of COVID-19 has resulted in reduced use of food oils. This reduction is not expected to be permanent. Consumption is expected to rebound to pre-pandemic levels for most oils in MY2021/22.

Ongoing uncertainty surrounding Brexit and the future trading relationship between the UK and EU has led to increased stockpiling of products prior to December 2020. This has disrupted traditional trade flows, but this is expected to be a MY2020/21 only issue and will not have a lasting impact.

## **Rapeseed**

### **Production**

The total UK rapeseed area is forecast to decrease a further 17 percent to 314 MHa in MY2021/22, following a significant reduction in MY2020/21. However, planting conditions were more favorable for the 2021 harvest and yields are not expected to be as low as 2020. Sources are suggesting that the decline in growing area has plateaued, but the lack of available chemicals means growers are making late planting decisions. The main reason for the continued decrease in rapeseed area is the ban on neonicotinoids in the UK, implemented in 2018. The ban makes rapeseed cultivation both more difficult and costly. The remaining insecticides available on the market are not as effective, resulting in higher insect damage despite increased frequency of pesticide applications. Higher costs and lower yields make rapeseed less competitive compared to other crops. Disease pressure is currently low; however, recent cold weather and prolonged frost during the flowering period is likely to hit yields in the North of England. Production is forecast to reach 986 TMT in MY2021/22, six percent lower than the previous year.

### **Consumption**

The primary consumption of rapeseed oilseeds in the UK is for products after crushing - rapeseed meal and rapeseed oil. Rapeseed oil is the most important driver and is mainly used for human consumption quality oil, which is a high-end product. The UK supply in MY2020/2021 was impacted by COVID-19, the large reduction in crushing of 30 percent resulted in higher prices for the consumer and increased imports. Total consumption is not forecast to increase significantly in MY2021/22.

## Trade

The UK was historically a net exporter of rapeseed oilseed. However, with the loss of neonicotinoid chemicals it is now heavily reliant on imports. Between July 2020 and February 2021, the UK imported over 481 TMT of rapeseed oilseed, compared to 308 TMT in the same months in MY2019/20. This was partly driven by stockpiling for Brexit. Imports are expected to slow for the second half of MY2020/21. There was a large increase in rapeseed oilseeds imported from Ukraine between August and December, in MY2020/21.

## Stocks

Stocks of rapeseed oilseed are forecast to remain low in the UK. There is an expectation that stocks will begin to increase closer to historic levels but not before MY2021/22.

Oilseed, Rapeseed Market Year Begins	2019/2020		2020/2021		2021/2022	
	Jul 2019		Jul 2020		Jul 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
United Kingdom						
Area Planted (1000 HA)	0	530	0	380	0	320
Area Harvested (1000 HA)	0	520	0	379	0	314
Beginning Stocks (1000 MT)	0	0	0	59	0	20
Production (1000 MT)	0	1750	0	1050	0	995
MY Imports (1000 MT)	0	426	0	580	0	675
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	305	0	0	0	0
Total Supply (1000 MT)	0	2176	0	1630	0	1690
MY Exports (1000 MT)	0	74	0	100	0	80
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	0	2000	0	1400	0	1500
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	0	102	0	110	0	110
Total Dom. Cons. (1000 MT)	0	2102	0	1510	0	1610
Ending Stocks (1000 MT)	0	0	0	20	0	0
Total Distribution (1000 MT)	0	2176	0	1630	0	1690
CY Imports (1000 MT)	0	0	0	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	0	0	0	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	3.3654	0	2.7704	0	3.1688

(1000 HA) ,(1000 MT) ,(MT/HA)

## Rapeseed meal

### Production

As with other crops, rapeseed meal production is expected to rebound in MY2021/22 close to MY2019/20 levels. With the declining area of crop grown in the UK, this production will consist of a significant proportion of imported oilseed. Supply of rapeseed meal is tight globally and demand from the UK is rising.

### Feed Consumption

The demand for rapeseed meal comes from the UK livestock sector. The UK is a leading producer and exporter of meat and dairy products; however, numbers of livestock did reduce as a result of Brexit uncertainty. Concerns of a potential loss of market access for the export of beef and lamb to the EU prompted some farmers to reduce the number of livestock that needed fattening for market. The forecast for MY2021/22 is for feed demand to return above MY2019/20 levels. Rapeseed meal competes with soybeans and soybean meal from the United States and other suppliers as well as sunflower meal and grains in feed ratios. In dairy production, rapeseed meal has become the dominant protein source, where it is considered a viable alternative to soybean meal. Due to its high protein content, soybean meal remains the top choice in feed ratios for poultry and swine.

Meal, Rapeseed Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jul 2019		Jul 2020		Jul 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	2000	0	1400	0	1500
Extr. Rate, 999.9999 (PERCENT)	0	0.571	0	0.5679	0	0.568
Beginning Stocks (1000 MT)	0	34	0	59	0	34
Production (1000 MT)	0	1142	0	795	0	852
MY Imports (1000 MT)	0	300	0	400	0	500
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	1476	0	1254	0	1386
MY Exports (1000 MT)	0	167	0	95	0	100
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	0	1250	0	1125	0	1275
Total Dom. Cons. (1000 MT)	0	1250	0	1125	0	1275
Ending Stocks (1000 MT)	0	59	0	34	0	11
Total Distribution (1000 MT)	0	1476	0	1254	0	1386
(1000 MT) ,(PERCENT)						

## Rapeseed Oil

### Production

Demand for rapeseed oil is the main driver for the rapeseed market in the UK. The UK predominately produces oil for food use with a small, but stable, quantity for industrial use. Production in MY2020/21 is forecast to be 30 percent lower than MY2019/20 having been impacted by COVID-19. It is forecast to increase in MY2021/22 but not back to MY2019/20 levels. Imports of rapeseed oil were 49TMT in MY2019/20 down 21 percent compared to 63TMT in MY2018/19. However, imports between July 2020 and February 2021, are at 138 TMT mainly because the UK crushing capacity was restricted as a result of COVID-19 so more imports were required.

### Consumption

Food consumption is forecast to be lower in MY2020/21 as a direct impact of the UK's large scale hospitality closure during COVID-19 lockdowns. However, it is expected to return close to MY2019/20 levels for the out-year. Industrial consumption remains a small part of UK consumption at 20 TMT.

Oil, Rapeseed Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jul 2019		Jul 2020		Jul 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b> (1000 MT)	0	2000	0	1400	0	1500
<b>Extr. Rate, 999.9999</b> (PERCENT)	0	0.401	0	0.4007	0	0.4007
<b>Beginning Stocks</b> (1000 MT)	0	51	0	15	0	6
<b>Production</b> (1000 MT)	0	802	0	561	0	601
<b>MY Imports</b> (1000 MT)	0	49	0	200	0	180
<b>MY Imp. from U.S.</b> (1000 MT)	0	0	0	0	0	0
<b>MY Imp. from EU</b> (1000 MT)	0	0	0	0	0	0
<b>Total Supply</b> (1000 MT)	0	902	0	776	0	787
<b>MY Exports</b> (1000 MT)	0	187	0	120	0	122
<b>MY Exp. to EU</b> (1000 MT)	0	0	0	0	0	0
<b>Industrial Dom. Cons.</b> (1000 MT)	0	20	0	20	0	20
<b>Food Use Dom. Cons.</b> (1000 MT)	0	680	0	630	0	645
<b>Feed Waste Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Dom. Cons.</b> (1000 MT)	0	700	0	650	0	665
<b>Ending Stocks</b> (1000 MT)	0	15	0	6	0	0
<b>Total Distribution</b> (1000 MT)	0	902	0	776	0	787
(1000 MT) ,(PERCENT)						

## Soybean Seed

### Consumption and Trade

The UK imports a significant amount of soybean each year, predominately for use in crushing but also for food use and livestock feed. The main supplier is Brazil, followed by Canada and the United States. Soybean imports compete directly with rapeseed in the livestock feed sector. Soybean imports for crushing continue to increase, with imports between October 2020 and February 2021 five percent higher than the same months in MY2019/20. A four percent increase in crushing forecast for both MY2020/21 and MY2021/22.

Oilseed, Soybean Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	757	0	805	0	830
MY Imp. from U.S. (1000 MT)	0	126	0	120	0	130
MY Imp. from EU (1000 MT)	0	33	0	25	0	25
Total Supply (1000 MT)	0	757	0	805	0	830
MY Exports (1000 MT)	0	23	0	32	0	26
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	0	675	0	700	0	725
Food Use Dom. Cons. (1000 MT)	0	30	0	37	0	39
Feed Waste Dom. Cons. (1000 MT)	0	29	0	36	0	40
Total Dom. Cons. (1000 MT)	0	734	0	773	0	804
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	757	0	805	0	830
CY Imports (1000 MT)	0	0	0	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	0	0	0	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)

## Soybean Meal

Similarly, the UK is expected to increase the amount of soybean crush for meal by four percent for MY2020/21 and MY2021/22, to meet demands from the livestock sector. Feed use of soybean meal is expected to go up by five percent in MY2020/21 compared to MY2019/2020. Imports of soybean meal are also forecast to rise to 2.2 MMT in MY2020/21. The major supplier will be Argentina, followed by the EU. Feed usage of soybean meal remains high in MY2020/21, largely supported by the continued inclusion in livestock rations, despite high global prices.

Meal, Soybean Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	675	0	700	0	725
Extr. Rate, 999.9999 (PERCENT)	0	0.7778	0	0.7786	0	0.7766
Beginning Stocks (1000 MT)	0	0	0	30	0	20
Production (1000 MT)	0	525	0	545	0	563
MY Imports (1000 MT)	0	2132	0	2265	0	2365
MY Imp. from U.S. (1000 MT)	0	46	0	52	0	60
MY Imp. from EU (1000 MT)	0	615	0	620	0	650
Total Supply (1000 MT)	0	2657	0	2840	0	2948
MY Exports (1000 MT)	0	77	0	80	0	83
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	0	2550	0	2740	0	2845
Total Dom. Cons. (1000 MT)	0	2550	0	2740	0	2845
Ending Stocks (1000 MT)	0	30	0	20	0	20
Total Distribution (1000 MT)	0	2657	0	2840	0	2948
(1000 MT) ,(PERCENT)						



## Soybean Oil

UK soybean oil imports and food use continue to rise steadily after a reduction in MY2019/20. Industrial use has declined possibly as UK biofuel production focuses on grain and corn. Consumption of soybean oil in food continues to increase. Imports are forecast to return to 180 TMT in MY2020/21. Imports between, October 2020 and February 2021, are nine percent higher compared to the same months in MY2019/20. The majority of imports are from the EU.

Oil, Soybean Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	675	0	700	0	725
Extr. Rate, 999.9999 (PERCENT)	0	0.1867	0	0.1871	0	0.1862
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	126	0	131	0	135
MY Imports (1000 MT)	0	159	0	180	0	200
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	150	0	180	0	200
Total Supply (1000 MT)	0	285	0	311	0	335
MY Exports (1000 MT)	0	24	0	26	0	25
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	11	0	10	0	10
Food Use Dom. Cons. (1000 MT)	0	250	0	275	0	300
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	261	0	285	0	310
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	285	0	311	0	335
(1000 MT) ,(PERCENT)						

## Other Oilseeds

Oilseed, Sunflowerseed Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	55	0	50	0	50
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	55	0	50	0	50
MY Exports (1000 MT)	0	9	0	4	0	3
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	0	17	0	22	0	23
Food Use Dom. Cons. (1000 MT)	0	19	0	19	0	19
Feed Waste Dom. Cons. (1000 MT)	0	10	0	5	0	5
Total Dom. Cons. (1000 MT)	0	46	0	46	0	47
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	55	0	50	0	50
CY Imports (1000 MT)	0	0	0	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	0	0	0	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)

Oilseed, Peanut Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	150	0	180	0	200
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	150	0	180	0	200
MY Exports (1000 MT)	0	13	0	10	0	8
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	137	0	170	0	190
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	137	0	170	0	190
Ending Stocks (1000 MT)	0	0	0	0	0	2
Total Distribution (1000 MT)	0	150	0	180	0	200
CY Imports (1000 MT)	0	0	0	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	0	0	0	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)

Oilseed, Palm Kernel Market Year Begins	2019/2020		2020/2021		2021/2022	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
United Kingdom						
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	5	0	5	0	5
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	5	0	5	0	5
MY Exports (1000 MT)	0	0	0	0	0	0
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	0	5	0	5	0	5
Total Dom. Cons. (1000 MT)	0	5	0	5	0	5
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	5	0	5	0	5
CY Imports (1000 MT)	0	0	0	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	0	0	0	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)

## Other Meals

Meal, Sunflowerseed Market Year Begins	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
United Kingdom						
Crush (1000 MT)	0	17	0	22	0	23
Extr. Rate, 999.9999 (PERCENT)	0	0.4706	0	0.4545	0	0.4783
Beginning Stocks (1000 MT)	0	14	0	11	0	11
Production (1000 MT)	0	8	0	10	0	11
MY Imports (1000 MT)	0	424	0	359	0	400
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	432	0	380	0	422
MY Exports (1000 MT)	0	2	0	1	0	1
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	0	433	0	368	0	410
Total Dom. Cons. (1000 MT)	0	433	0	368	0	410
Ending Stocks (1000 MT)	0	11	0	11	0	11
Total Distribution (1000 MT)	0	446	0	380	0	422

(1000 MT) ,(PERCENT)

Meal, Palm Kernel Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	312	0	315	0	318
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	312	0	315	0	318
MY Exports (1000 MT)	0	0	0	0	0	0
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	0	312	0	315	0	318
Total Dom. Cons. (1000 MT)	0	312	0	315	0	318
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	312	0	315	0	318
(1000 MT) ,(PERCENT)						

Meal, Fish Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Catch For Reduction (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	35	0	35	0	35
MY Imports (1000 MT)	0	112	0	115	0	115
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	147	0	150	0	150
MY Exports (1000 MT)	0	26	0	25	0	25
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	0	121	0	125	0	125
Total Dom. Cons. (1000 MT)	0	121	0	125	0	125
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	147	0	150	0	150
(1000 MT) ,(PERCENT)						

## Other Oils

Oil, Sunflowerseed Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	17	0	22	0	23
Extr. Rate, 999.9999 (PERCENT)	0	0.4706	0	0.4545	0	0.4348
Beginning Stocks (1000 MT)	0	36	0	59	0	42
Production (1000 MT)	0	8	0	10	0	10
MY Imports (1000 MT)	0	348	0	330	0	350
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	356	0	399	0	402
MY Exports (1000 MT)	0	17	0	15	0	15
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	1	0	1	0	1
Food Use Dom. Cons. (1000 MT)	0	315	0	341	0	355
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	316	0	342	0	356
Ending Stocks (1000 MT)	0	59	0	42	0	31
Total Distribution (1000 MT)	0	392	0	399	0	402

(1000 MT) ,(PERCENT)

Oil, Palm Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	41	0	25	0	20
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	421	0	450	0	460
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	421	0	475	0	480
MY Exports (1000 MT)	0	32	0	30	0	35
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	25	0	25	0	25
Food Use Dom. Cons. (1000 MT)	0	380	0	400	0	400
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	405	0	425	0	425
Ending Stocks (1000 MT)	0	25	0	20	0	20
Total Distribution (1000 MT)	0	462	0	475	0	480
CY Imports (1000 MT)	0	0	0	0	0	0
CY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
CY Exports (1000 MT)	0	0	0	0	0	0
CY Exp. to U.S. (1000 MT)	0	0	0	0	0	0
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)

Oil, Olive Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	3	0	4	0	2
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	86	0	85	0	85
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	86	0	89	0	87
MY Exports (1000 MT)	0	2	0	2	0	2
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	83	0	85	0	85
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	83	0	85	0	85
Ending Stocks (1000 MT)	0	4	0	2	0	0
Total Distribution (1000 MT)	0	89	0	89	0	87
(1000 HA) ,(1000 TREES) ,(1000 MT)						

Oil, Palm Kernel Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	29	0	30	0	30
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	29	0	30	0	30
MY Exports (1000 MT)	0	0	0	0	0	0
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	29	0	30	0	30
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	29	0	30	0	30
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	29	0	30	0	30
(1000 MT) ,(PERCENT)						

Oil, Coconut Market Year Begins United Kingdom	2019/2020		2020/2021		2021/2022	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	0	0	0	0	0	0
Extr. Rate, 999.9999 (PERCENT)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	0	25	0	25	0	26
MY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
MY Imp. from EU (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	0	25	0	25	0	26
MY Exports (1000 MT)	0	1	0	1	0	1
MY Exp. to EU (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	24	0	24	0	25
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	24	0	24	0	25
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	0	25	0	25	0	26
(1000 MT) ,(PERCENT)						

## Policy

With its departure from the EU, the UK introduced its [Global Tariff](#), a simplification of the EU regime, albeit all but the same for grains. In other areas, it continues to follow the EU in the main – see the EU27 report for more details - but some diversification is expected over time. For example, with its departure from the EU, the UK has departed the Common Agricultural Policy.

The UK and EU agreed the [Trade and Cooperation Agreement](#) (TCA) on December 24, 2020 and trade between the two remains tariff free, albeit subject to increased paperwork due to the UK's departure from the EU's customs union and single market. The UK has regained powers to set maximum residue levels (MRLs) for imports and approve chemicals for use in UK crops. The UK will not be pursuing the same MRL review process as the EU and will set up a review mechanism in approximately three years. There will only be a change to existing MRLs and import tolerances where there is evidence of a public health risk.

Her Majesty's Government (HMG) is expected to bring forward an Environment Bill in the next parliament session, which begins in May 2021. The next parliament session will begin with a Queens Speech, this is written by HMG and details key legislation to be introduced to the parliament for debate. Until the speech there is little information available on proposed new policy or changes to existing policy. FAS/London will continue to monitor the policy situation and will provide updates when necessary.

## Attachments:

No Attachments