

EU-28 Oat Product Trade

Thursday, October 15, 2020



UK data is no longer included
with EU estimates

EU Oat Product Trade

Exports

- EU-27 oat product exports are up 14.8% year to-date (Jan-Jun) and remain on a record pace. Exports are reported at 203.4 ThMt, up from 177.2 ThMt for the same period last year. The large YOY gains are tied to Covid quarantines and higher consumption of foods containing oats in homes.
- Exports in the combined top 10 exporters are up 14.5%, also on a record pace.
- Exports from Germany, the largest EU exporter (53% market share) are up 9.2% with Finland (2nd largest) up 31.5% YTD. Finland continues to show remarkable growth for a developing export market.
- Belgium exports are up a huge 67.6% YTD with Ireland down 26.6% and Latvia down 2.4%. Strong gains were reported from Denmark, up 74.4%. Rounding out the top ten Netherlands exports are down 7.1%, Czechia up 1.3%, France and Sweden gaining 36.2% and 69.3% respectively.

Imports

- Total EU oat product imports YTD are also higher, up 6.8% YTD, also on a record pace.
- Imports in the top 10 importers are up 6.2% or 8,821 Mt.
- Imports in the Netherlands, the largest importer (mainly for re-export), are down 15.3% with French imports up 9.4% YTD.
- Others in the top 10 are reporting gains except for Spain which is down 11.2% YTD.
- We are expecting oat product trade to remain strong through the Covid-19 crisis as demand for packaged oat foods remains strong. Any positive solution to COVID is expected to see a slow down in oat product trade.

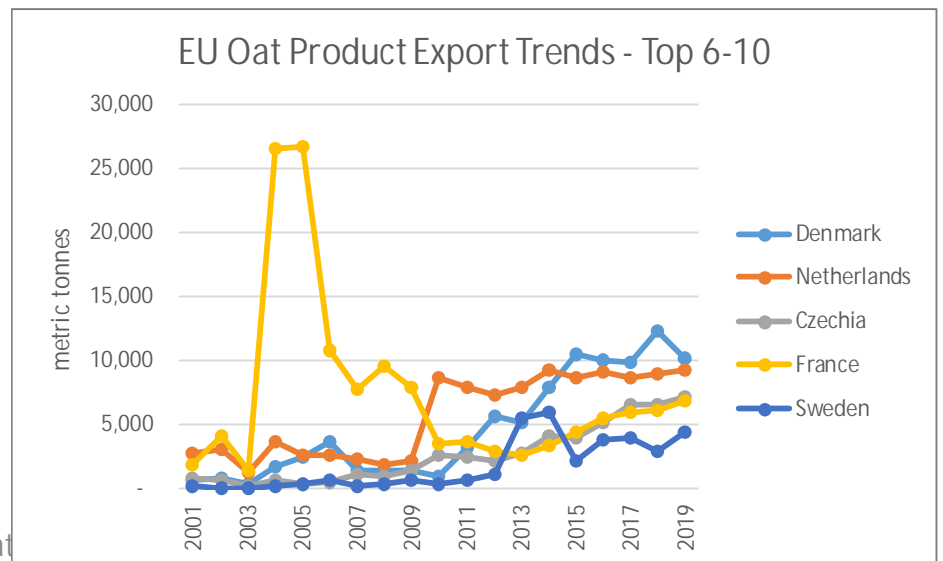
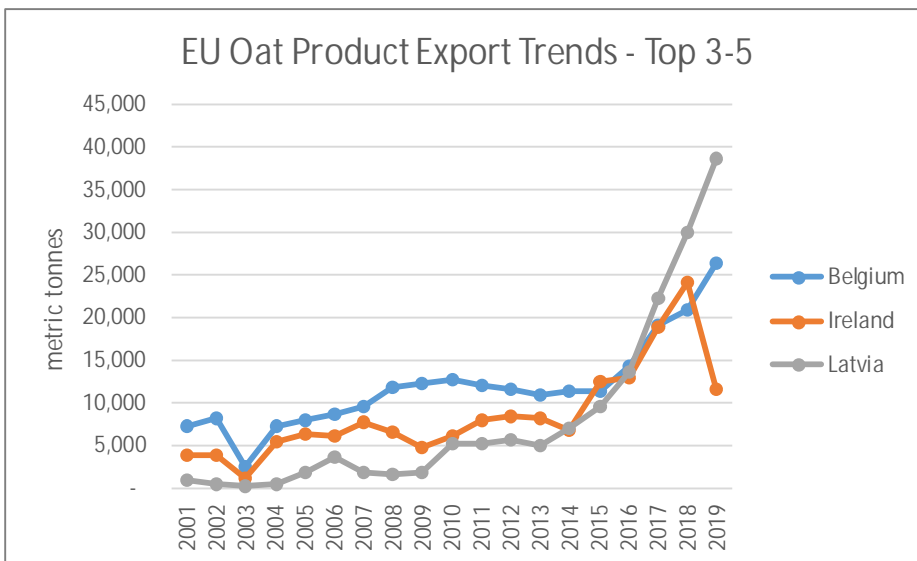
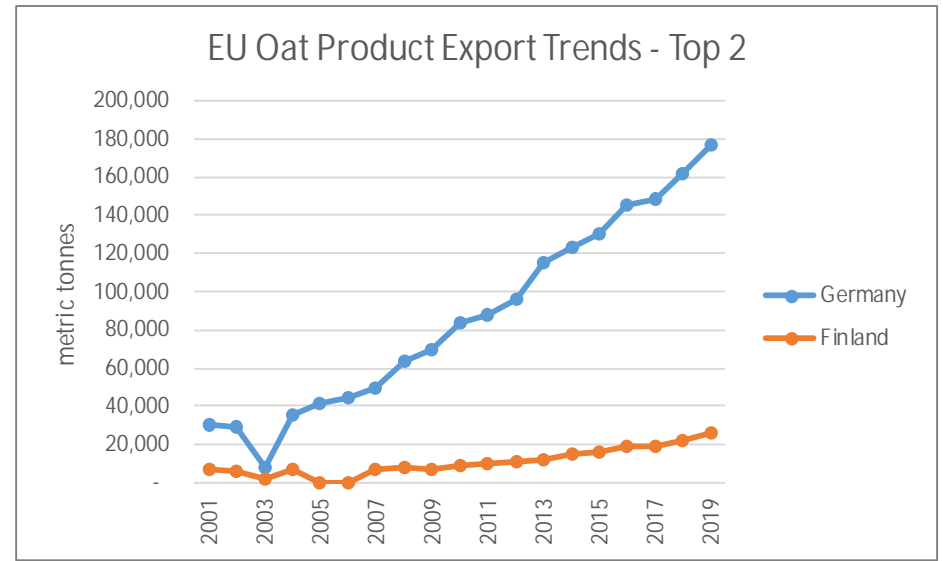
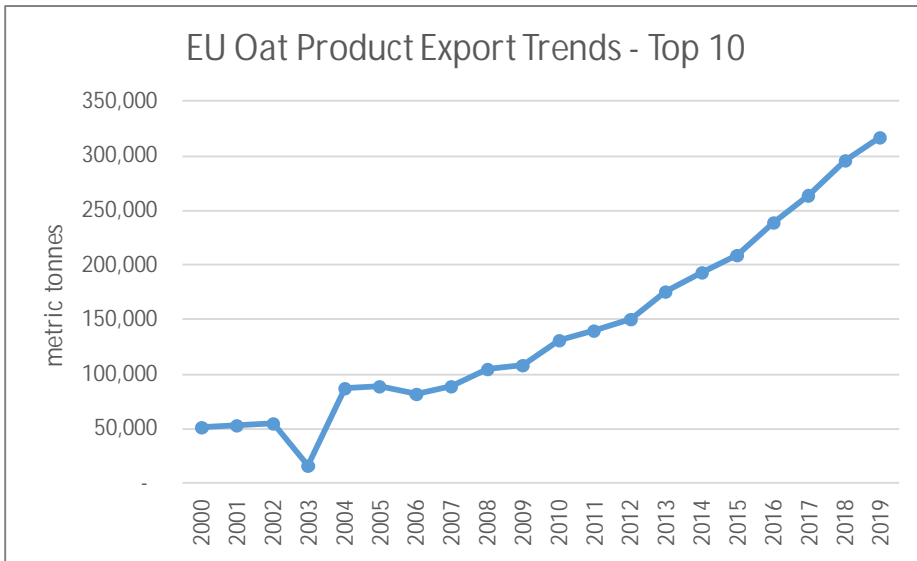
Exports



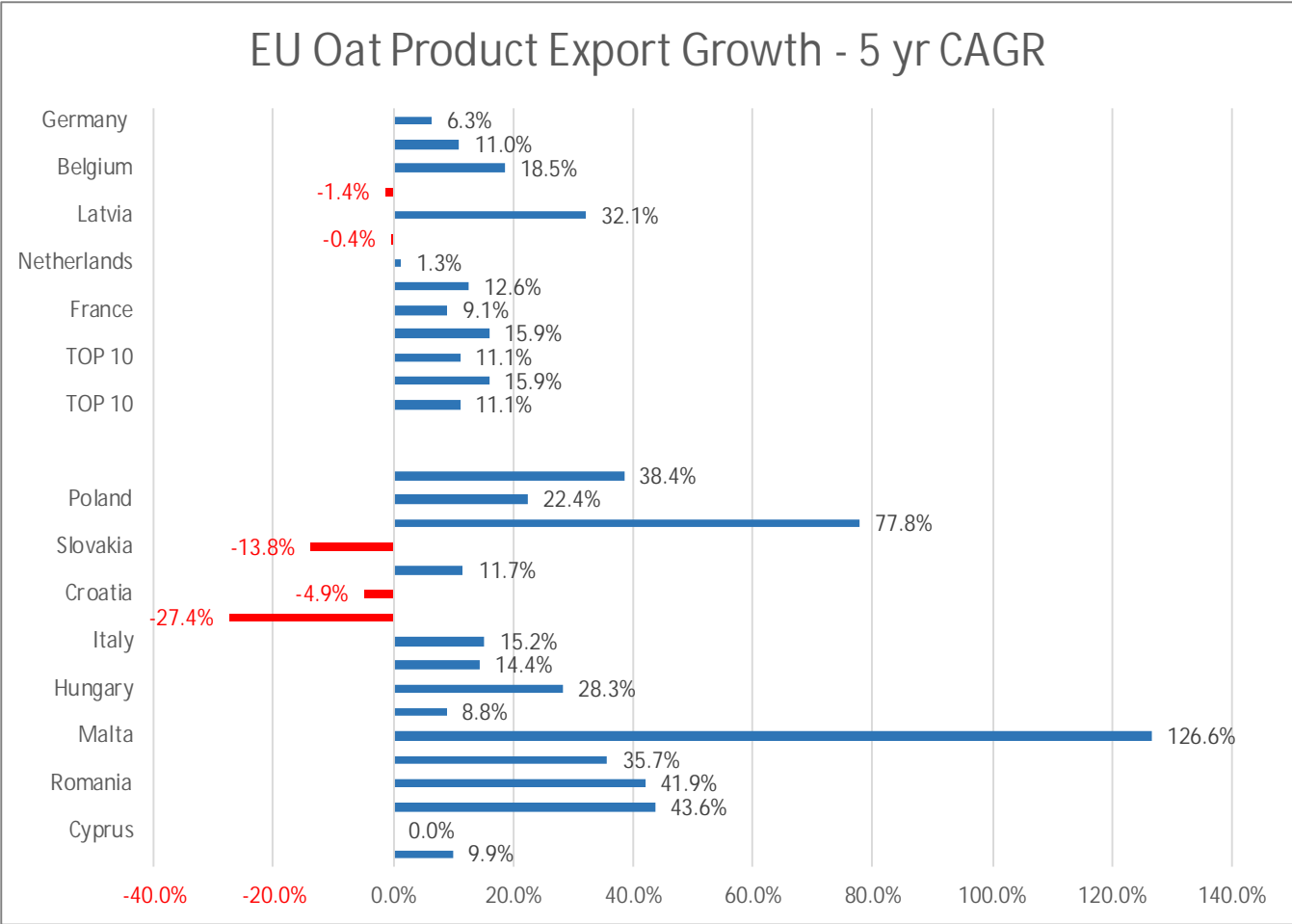
EU Oat Product Exports

metric tonnes	Jan-Dec								Year to Date (Jan-Jun)			
	2015	2016	2017	2018	2019	5 Yr avg	% of Total	5 yr CAGR	2020	2019	Chge	MT Chge
Germany	129,946	145,211	148,908	161,850	176,430	152,469	53.0%	6.3%	101,739	93,196	9.2%	8,543.4
Finland	15,712	19,400	19,404	22,594	26,497	20,721	7.2%	11.0%	16,875	12,832	31.5%	4,043.2
Belgium	11,295	14,317	19,140	20,820	26,446	18,404	6.4%	18.5%	17,998	10,737	67.6%	7,261.0
Ireland	12,389	13,011	18,931	24,053	11,551	15,987	5.6%	-1.4%	4,278	5,825	-26.6%	(1,547.6)
Latvia	9,624	13,608	22,142	30,074	38,731	22,836	7.9%	32.1%	19,250	19,715	-2.4%	(465.5)
Denmark	10,390	9,960	9,910	12,278	10,182	10,544	3.7%	-0.4%	7,401	4,244	74.4%	3,156.4
Netherlands	8,640	9,121	8,586	8,967	9,198	8,902	3.1%	1.3%	4,331	4,661	-7.1%	(329.6)
Czechia	3,973	5,129	6,568	6,565	7,180	5,883	2.0%	12.6%	3,959	3,907	1.3%	52.0
France	4,427	5,487	5,849	5,991	6,832	5,717	2.0%	9.1%	4,332	3,181	36.2%	1,151.0
Sweden	2,111	3,774	3,868	2,917	4,420	3,418	1.2%	15.9%	3,493	2,062	69.3%	1,430.1
Top 10	208,507	239,017	263,306	296,109	317,468	215,956	90.9%	8.5%	183,654	160,360	14.5%	23,294.4
Spain	1,277	7,272	5,034	6,676	6,485	5,349	1.9%	38.4%	4,299	3,221	33.5%	1,078.1
Poland	1,986	2,999	3,470	3,770	5,461	3,537	1.2%	22.4%	3,448	2,749	25.4%	698.9
Lithuania	773	2,513	6,196	10,727	13,757	6,793	2.4%	77.8%	8,471	7,605	11.4%	866.1
Slovakia	2,437	1,916	1,730	1,436	1,157	1,735	0.6%	-13.8%	454	850	-46.6%	(396.3)
Austria	1,619	1,757	1,958	1,625	2,813	1,954	0.7%	11.7%	1,568	1,252	25.2%	316.0
Croatia	678	1,084	1,950	1,788	526	1,205	0.4%	-4.9%	132	306	-56.7%	(173.3)
Estonia	551	390	192	148	111	278	0.1%	-27.4%	45	24	89.5%	21.2
Italy	259	501	546	676	526	501	0.2%	15.2%	249	260	-4.4%	(11.4)
Bulgaria	322	411	309	672	631	469	0.2%	14.4%	187	208	-10.1%	(21.0)
Hungary	88	224	377	205	305	240	0.1%	28.3%	215	144	49.9%	71.7
Portugal	122	114	216	324	186	192	0.1%	8.8%	239	67	255.4%	171.9
Malta	4	262	248	51	263	166	0.1%	126.6%	166	8	2026.9%	158.1
Slovenia	46	51	111	181	214	121	0.0%	35.7%	206	89	132.5%	117.4
Greece	50	73	98	75	143	88	0.0%	23.3%	44	32	35.8%	11.6
Romania	21	11	86	47	123	58	0.0%	41.9%	88	18	393.3%	70.4
Luxembourg	6	37	34	36	35	30	0.0%	43.6%	13	16	-17.3%	(2.8)
Cyprus	-	-	-	-	-	-	0.0%		-	-	0.0%	0.0
Others	10,239	19,613	22,554	28,435	32,734	22,715	7.9%	26.2%	19,825	16,848	17.7%	2,976.6
Grand Total	218,746	258,630	285,859	324,544	350,202	287,596	100.0%	9.9%	203,479	177,208	14.8%	26,271.0

EU Oat Product Export Trends – Top 10

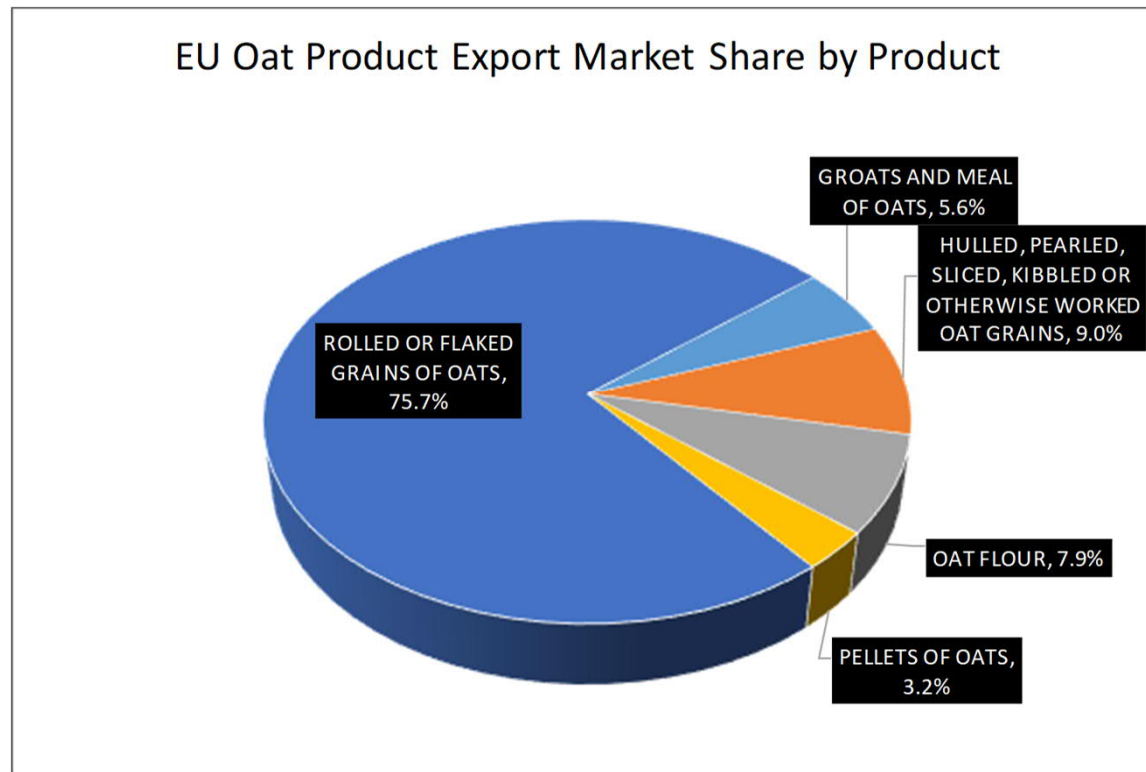


EU Oat Product Export Growth – Top 10



EU Oat Product Export Market Share by Commodity

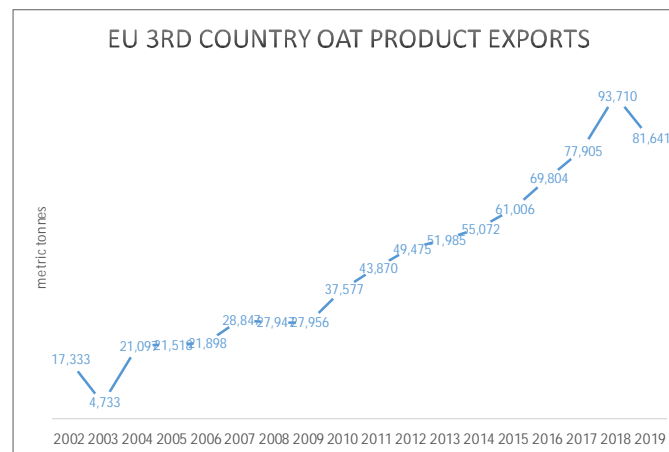
EU Oat Product Exports														
metric tonnes											Year to Date (Jan-Jun)			
	2013	2014	2015	2016	2017	2018	2019	5 Yr avg	% of Total	5 yr CAGR	2020	2019	Chge	MT Chge
GROATS AND MEAL OF OATS	4,523	4,787	10,997	13,212	14,116	20,492	12,824	14,328	5.6%	3.1%	8,241	5,555	48.4%	2,686.7
HULLED, PEARLED, SLICED, KIBBLED OR OTHERWISE WORKED OAT GRAINS	17,096	17,472	21,706	23,635	22,317	21,669	26,253	23,116	9.0%	3.9%	20,775	11,486	80.9%	9,289.7
OAT FLOUR	22,944	22,689	17,300	21,363	19,987	20,997	31,412	20,467	7.9%	-1.5%	20,754	15,096	37.5%	5,658.6
PELLETS OF OATS	5,792	8,006	4,587	11,013	7,922	9,600	12,835	8,226	3.2%	3.7%	10,756	5,702	88.7%	5,054.5
ROLLED OR FLAKED GRAINS OF OATS	134,488	148,486	164,156	189,407	221,517	251,788	266,878	195,070	75.7%	11.1%	142,952	139,370	2.6%	3,581.5
Grand Total	184,843	201,439	218,746	258,630	285,859	324,544	350,202	257,844	100.0%	10.0%	203,479	177,208	14.8%	26,271.0



3rd Country Oat Product Exports

EU Oat Product Exports - 3rd Countries- Top 15

metric tonnes	2015	2016	2017	2018	2019	5 Yr avg	% of Total	5 yr CAGR	Year to Date (Jan-Jun)			
									2020	2019	Chge	MT Chge
Côte d'Ivoire (Ivory Coast)	1,702	3,358	2,115	3,421	3,182	2,756	3.6%	13.3%	2,056	1,790	14.8%	265.7
Ghana	3,619	4,869	4,860	5,253	4,871	4,694	6.1%	6.1%	2,300	2,255	2.0%	44.9
Israel (incl. West Bank and Gaza Strip)	1,965	1,916	1,714	1,801	1,424	1,764	2.3%	-6.2%	851	636	33.7%	214.4
Japan	711	966	2,153	2,511	2,181	1,705	2.2%	25.1%	1,802	886	103.3%	915.3
Moldova, Republic of	1,802	1,790	1,687	1,688	1,813	1,756	2.3%	0.1%	993	883	12.5%	110.7
Morocco	796	1,226	1,945	3,234	4,518	2,344	3.1%	41.5%	2,087	3,745	-44.3%	(1,657.7)
North Macedonia	1,354	797	1,897	1,900	2,081	1,606	2.1%	9.0%	1,171	1,035	13.2%	136.7
Russian Federation (Russia)	5,005	4,362	4,519	4,666	4,070	4,524	5.9%	-4.1%	2,398	1,993	20.3%	404.8
South Africa (incl. Namibia 'NA' -> 10)	675	544	2,156	3,010	4,187	2,114	2.8%	44.1%	2,154	2,338	-7.9%	(184.1)
Switzerland (incl. Liechtenstein 'LI' -	2,567	2,743	3,378	3,963	4,324	3,395	4.4%	11.0%	2,382	2,220	7.3%	162.3
Ukraine	4,677	5,169	5,691	6,530	6,829	5,779	7.5%	7.9%	4,353	3,079	41.4%	1,273.5
United Arab Emirates	1,282	2,088	2,522	1,978	2,032	1,980	2.6%	9.6%	1,109	721	53.8%	387.8
United Kingdom	16,140	17,143	23,282	28,963	16,760	20,458	26.6%	0.8%	8,104	9,173	-11.7%	(1,069.3)
United States (incl. Navassa Island (t	4,047	4,340	2,800	3,595	2,665	3,490	4.5%	-8.0%	1,885	1,294	45.7%	591.2
Grand Total	61,006	69,804	77,905	93,710	81,641	76,813	100.0%	6.0%	47,788	40,806	17.1%	6,981.8

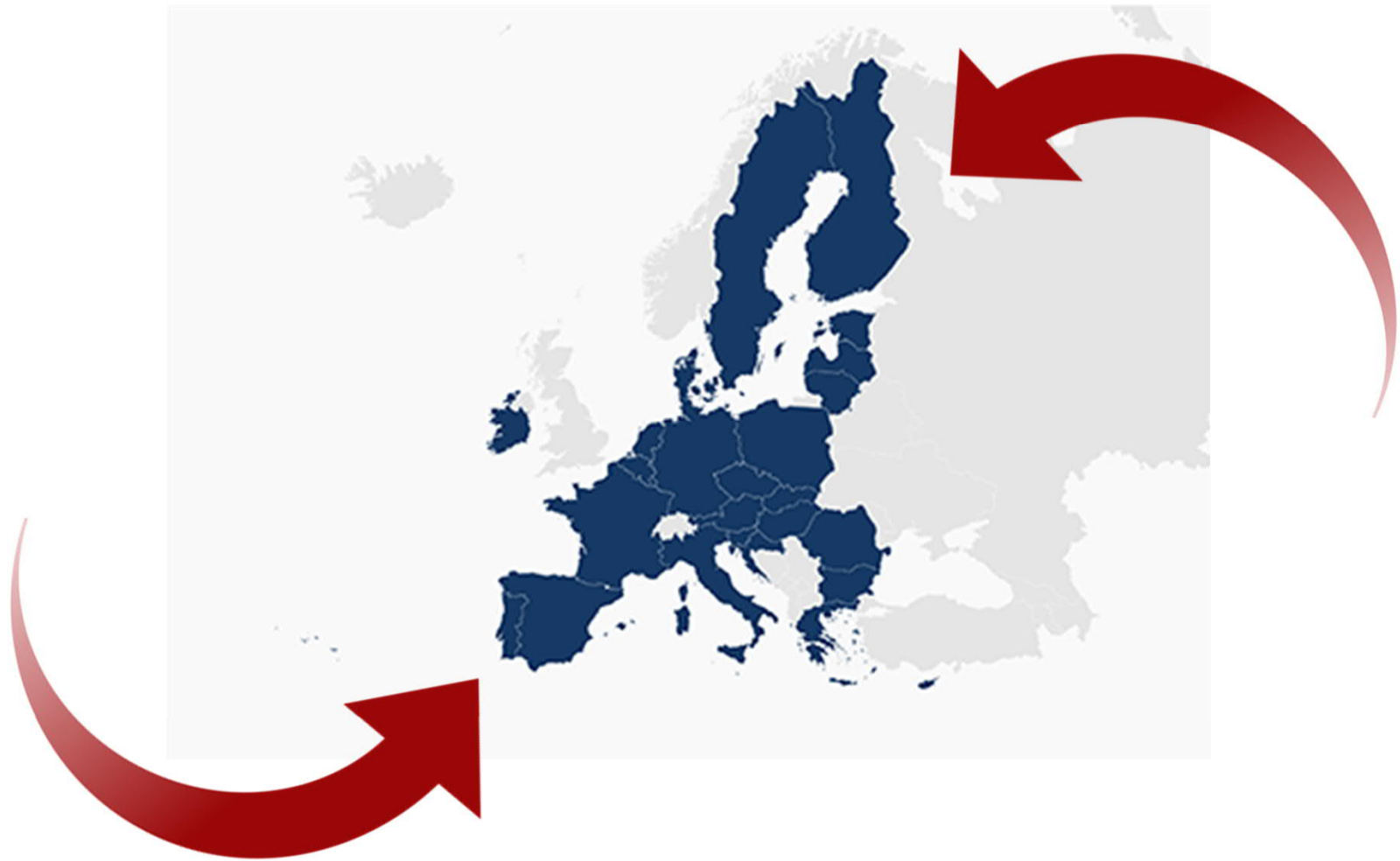


EU Oat Product Exports – 3rd Country

EU Oat Product Exports - 3rd Countries

metric tonnes	Calendar Year Jan-Dec								Year to Date (Jan-Jun)			
	2015	2016	2017	2018	2019	5 Yr avg	% of Total	5 yr CAGR	2020	2019	Chge	MT Chge
Austria	74	92	62	39	7	55	0.1%	-37.3%	7	3	103.1%	3.3
Belgium	110	176	478	387	257	282	0.4%	18.4%	1,071	136	689.5%	934.9
Bulgaria	19	26	25	21	72	32	0.0%	31.1%	28	9	227.9%	19.6
Croatia	544	530	1,658	1,253	107	819	1.1%	-27.7%	71	51	38.5%	19.7
Czechia	1,903	2,600	2,280	2,905	3,937	2,725	3.5%	15.6%	1,811	2,216	-18.3%	(404.6)
Denmark	836	937	755	695	782	801	1.0%	-1.3%	495	434	14.2%	61.5
Estonia	1	0	1	-	0	1	0.0%	-26.5%	13	0	13300.0%	13.3
Finland	6,765	7,919	7,863	8,022	8,166	7,747	10.1%	3.8%	5,315	3,701	43.6%	1,613.4
France	441	776	602	1,029	756	721	0.9%	11.4%	936	280	234.8%	656.3
Germany	32,075	34,881	33,032	37,261	36,560	34,762	45.3%	2.7%	22,501	18,563	21.2%	3,937.5
Greece	2	7	8	7	55	16	0.0%	87.0%	16	6	176.8%	9.9
Hungary	7	12	16	51	97	37	0.0%	67.2%	83	43	93.2%	39.9
Ireland	12,341	12,985	18,700	23,291	10,777	15,619	20.3%	-2.7%	4,041	5,534	-27.0%	(1,493.4)
Italy	50	112	129	224	252	153	0.2%	38.3%	98	98	0.4%	0.4
Latvia	1,233	1,897	3,072	5,922	5,136	3,452	4.5%	33.0%	2,338	2,652	-11.8%	(313.8)
Lithuania	167	810	2,109	4,031	7,112	2,846	3.7%	111.8%	4,583	3,780	21.2%	802.9
Luxembourg	0	-	-	-	-	0	0.0%	-100.0%	-	-	0.0%	0.0
Malta	4	262	246	51	263	165	0.2%	126.6%	166	8	2026.9%	158.1
Netherlands	3,302	2,845	2,785	5,313	3,315	3,512	4.6%	0.1%	1,450	1,326	9.3%	123.7
Poland	270	742	1,062	780	909	752	1.0%	27.5%	771	497	55.2%	274.0
Portugal	121	105	213	185	162	157	0.2%	6.1%	61	56	8.4%	4.7
Romania	5	1	4	4	9	4	0.0%	14.6%	11	1	730.8%	9.5
Slovakia	0	10	12	-	0	4	0.0%	0.0%	-	-	0.0%	0.0
Slovenia	46	37	49	65	69	53	0.1%	8.5%	69	35	95.7%	33.7
Spain	139	437	495	518	899	497	0.6%	45.3%	438	517	-15.2%	(78.7)
Sweden	552	1,606	2,251	1,656	1,943	1,601	2.1%	28.6%	1,418	862	64.5%	556.0
Grand Total	61,006	69,804	77,905	93,710	81,641	76,813	100.0%	6.0%	47,788	40,806	17.1%	6,981.8

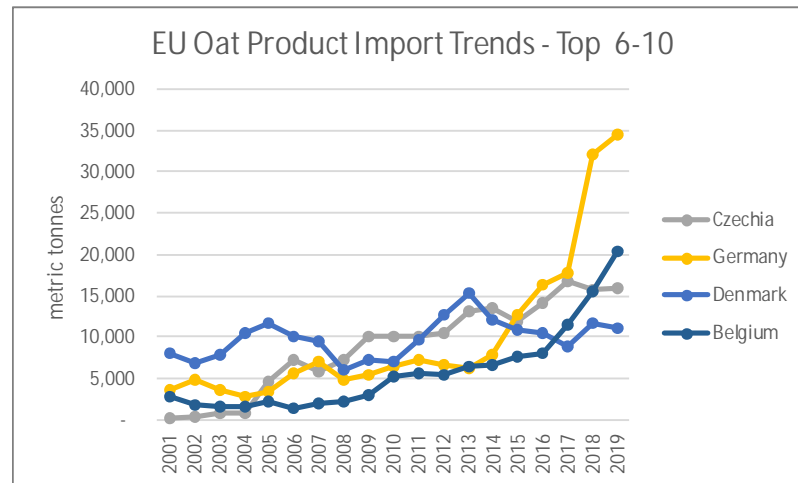
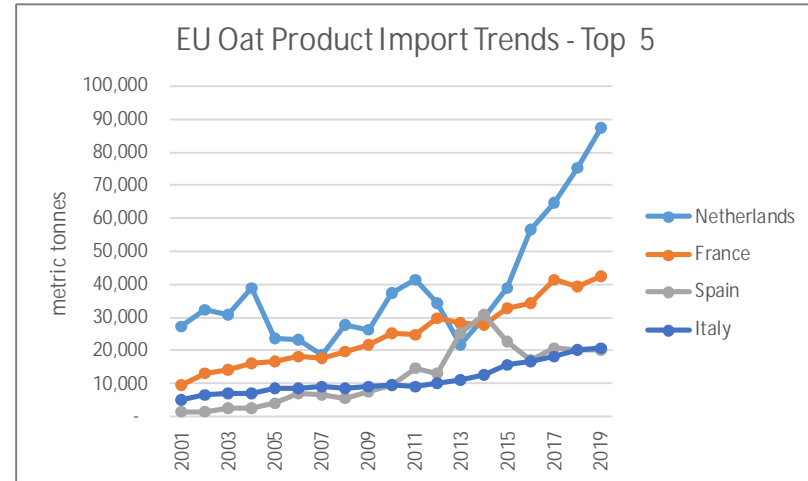
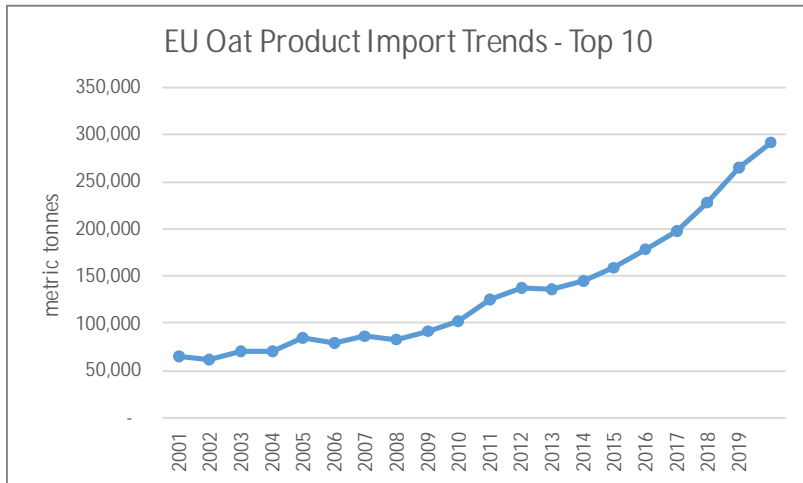
Imports



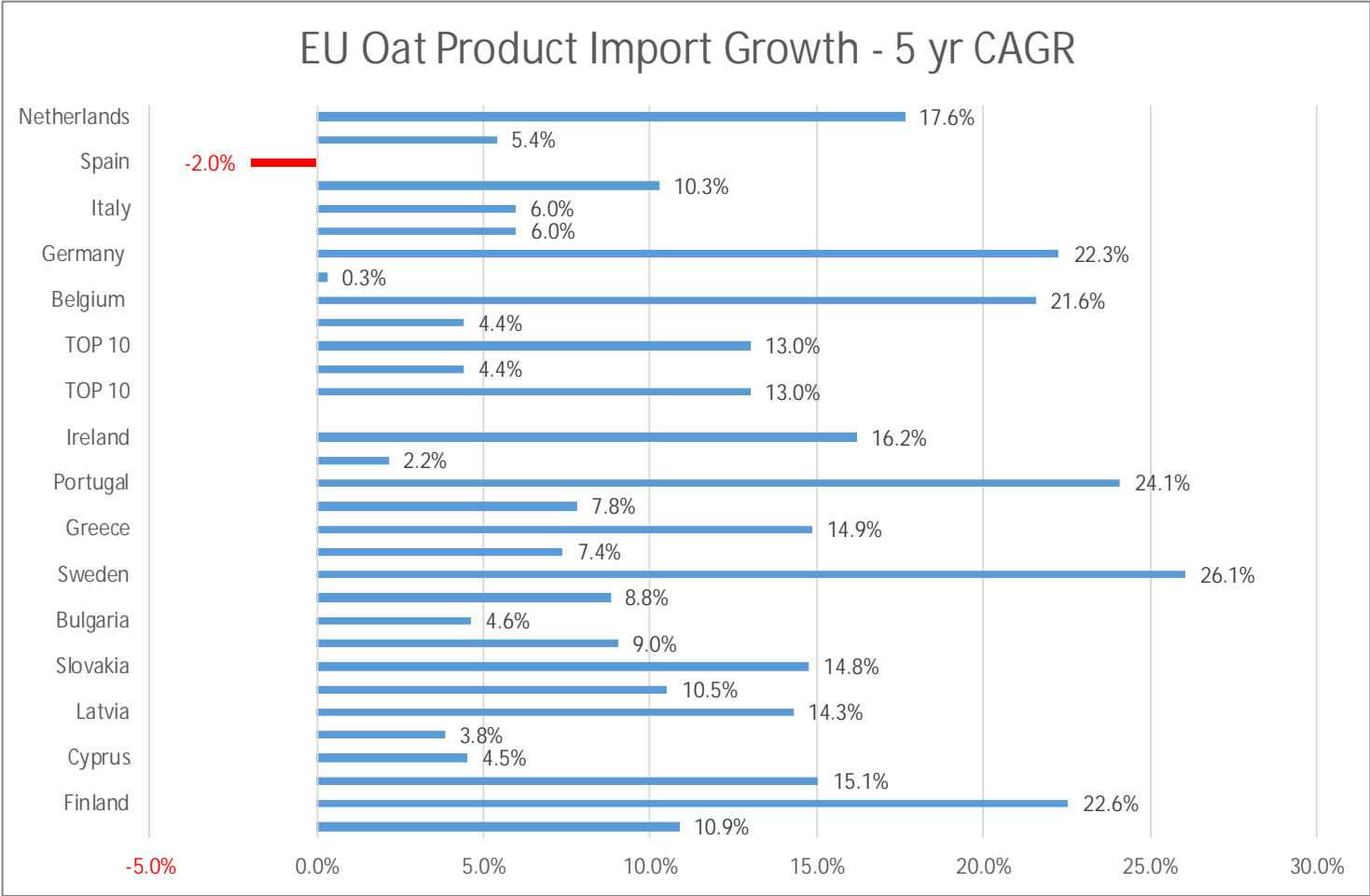
EU Oat Product Imports

metric tonnes	Jan-Dec								Year to Date (Jan-Jun)			
	2015	2016	2017	2018	2019	5 Yr avg	% of Total	5 yr CAGR	2020	2019	Chge	MT Chge
Netherlands	38,655	56,373	64,428	74,973	87,096	64,305	23.0%	17.6%	34,793	41,063	-15.3%	(6,270.1)
France	32,631	34,489	41,147	39,352	42,454	38,015	13.6%	5.4%	23,964	21,898	9.4%	2,065.9
Spain	22,463	17,284	20,698	20,407	20,331	20,237	7.2%	-2.0%	9,983	11,238	-11.2%	(1,255.1)
Poland	17,972	16,210	20,557	26,520	29,303	22,112	7.9%	10.3%	18,141	14,545	24.7%	3,595.9
Italy	15,540	16,813	18,118	20,111	20,768	18,270	6.5%	6.0%	10,275	9,728	5.6%	547.1
Czechia	11,970	14,056	16,779	15,769	16,018	14,918	5.3%	6.0%	10,151	8,060	25.9%	2,090.6
Germany	12,619	16,366	17,705	32,024	34,503	22,643	8.1%	22.3%	19,821	15,757	25.8%	4,064.6
Denmark	10,897	10,509	8,948	11,642	11,076	10,614	3.8%	0.3%	6,567	5,125	28.1%	1,442.2
Belgium	7,668	7,996	11,470	15,538	20,365	12,607	4.5%	21.6%	11,881	10,617	11.9%	1,264.2
Austria	7,314	8,583	8,846	9,496	9,078	8,663	3.1%	4.4%	5,710	4,434	28.8%	1,276.1
Top 10	177,730	198,677	228,695	265,831	290,989	232,384	83.0%	9.7%	151,287	142,466	6.2%	8,821.4
Ireland	5,677	7,614	5,572	9,967	12,031	8,172	2.9%	16.2%	7,334	8,130	-9.8%	(795.6)
Hungary	4,316	4,974	5,305	5,087	4,801	4,897	1.7%	2.2%	3,322	2,312	43.7%	1,009.5
Portugal	3,329	4,334	5,482	8,448	9,805	6,280	2.2%	24.1%	4,902	4,909	-0.1%	(7.0)
Lithuania	3,449	3,834	4,078	4,659	5,021	4,208	1.5%	7.8%	2,297	2,300	-0.1%	(2.9)
Greece	3,221	4,019	4,852	5,334	6,442	4,774	1.7%	14.9%	3,361	3,455	-2.7%	(93.2)
Estonia	2,606	2,363	2,738	3,085	3,722	2,903	1.0%	7.4%	1,915	1,838	4.2%	77.4
Sweden	2,389	2,522	2,557	2,653	7,608	3,546	1.3%	26.1%	5,674	2,509	126.2%	3,165.4
Croatia	1,913	2,162	2,699	2,987	2,917	2,536	0.9%	8.8%	1,517	1,487	2.0%	29.9
Bulgaria	1,721	1,980	2,143	2,143	2,159	2,029	0.7%	4.6%	1,273	1,033	23.2%	240.1
Romania	1,477	1,796	1,828	2,331	2,277	1,942	0.7%	9.0%	1,546	1,034	49.6%	512.3
Slovakia	1,421	1,218	2,587	3,218	2,831	2,255	0.8%	14.8%	1,314	1,484	-11.5%	(170.3)
Slovenia	825	1,123	1,200	1,241	1,361	1,150	0.4%	10.5%	864	693	24.7%	171.1
Latvia	754	749	570	892	1,470	887	0.3%	14.3%	480	1,097	-56.3%	(617.1)
Malta	705	477	700	896	851	726	0.3%	3.8%	295	289	2.0%	5.8
Cyprus	413	651	645	602	516	565	0.2%	4.5%	145	271	-46.5%	(126.2)
Luxembourg	336	357	550	461	677	476	0.2%	15.1%	349	251	38.8%	97.5
Finland	209	263	616	413	577	415	0.1%	22.6%	180	458	-60.7%	(277.7)
Other Total	34,760	40,433	44,122	54,419	65,065	47,760	17.0%	13.4%	36,768	33,549	9.6%	3,219.0
Grand Total	212,490	239,111	272,817	320,250	356,054	280,144	100.0%	10.9%	188,055	176,015	6.8%	12,040.4

EU Oat Product Import Trends – Top 10



EU Oat Product Import Growth – 5 Yr CAGR



EU Oat Product Import Market Share by Commodity

EU Oat Product Imports												Year to Date (Jan-Jun)			
metric tonnes	2013	2014	2015	2016	2017	2018	2019	5 Yr avg	% of Total	5 yr CAGR	2019	2018	Chge	MT Chge	
GROATS AND MEAL OF OATS HULLED, PEARLED, SLICED, KIBBLED OR OTHERWISE WORKED OAT	13,215	14,153	11,861	16,314	12,790	28,438	34,617	20,804	7.4%	23.9%	41,719	35,355	18.0%	6,363.8	
GRAINS	20,439	15,635	18,563	20,192	19,898	21,753	30,118	22,105	7.9%	10.2%	39,690	28,130	41.1%	11,560.3	
OAT FLOUR	22,746	26,119	19,720	15,816	20,073	26,559	30,579	22,550	8.0%	9.2%	38,901	34,174	13.8%	4,727.4	
PELLETS OF OATS	15,753	15,474	25,253	32,039	39,625	44,377	45,221	37,303	13.3%	12.4%	52,011	54,998	-5.4%	(2,987.0)	
ROLLED OR FLAKED GRAINS OF OATS	102,858	121,345	137,092	154,749	180,431	199,122	215,519	177,383	63.3%	9.5%	273,042	252,796	8.0%	20,246.2	
Grand Total	175,011	192,726	212,490	239,111	272,817	320,250	356,054	280,144	100.0%	10.9%	445,364	405,453	9.8%	39,910.7	

