German rapeseed oil exports fall as EU biofuel demand reshapes market

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Germanyâ??s rapeseed oil exports declined in 2025/26, but rising EU biofuel demand is keeping pressure on rapeseed supplies and supporting prices

Germany’s rapeseed oil trade is losing some momentum after a strong 2024/25 season, with exports falling sharply in 2025/26 even as demand from the European biofuel industry continues to strengthen. According to data from the German Federal Statistical Office, Germany exported 1.11 million tonnes of rapeseed oil in 2025/26, down about 14.4 per cent from the 1.30 million tonnes shipped during the previous crop year. The decline marks a clear reversal after 2024/25 delivered Germany’s second-highest export volume since the beginning of the century. The European Union remains the core market for German rapeseed oil. About 1.01 million tonnes, or 91 per cent of total exports, went to other EU member states during 2025/26.

The Netherlands remained by far the largest buyer, taking just under 568,900 tonnes, or more than half of Germany’s total rapeseed oil exports. However, Dutch purchases fell by around 23 per cent from the previous year. Belgium moved in the opposite direction. German exports to the country climbed 34 per cent to 118,500 tonnes, while shipments to Poland increased by 38 per cent. Exports to Denmark slipped 3 per cent, while those to France fell 21 per cent. Outside the EU, Norway and the UK remained important destinations. Germany exported around 29,900 tonnes to Norway, down approximately 45 per cent from the previous year.

The trade figures cover rapeseed oil, field mustard oil and mustard oil, including both crude and refined products used across food, technical and energy applications. The export decline, however, does not necessarily signal weaker fundamentals for Germany’s rapeseed sector. In fact, the underlying market is being shaped by a different force: growing demand for oilseeds from Europe’s biofuel industry. Germany has an oilseed processing capacity of around 10 million tonnes of rapeseed, making its crushing industry an important link between domestic agriculture and the wider food, feed and renewable fuels markets.

The Union zur Förderung von Oel- und Proteinpflanzen (UFOP) has highlighted the importance of this processing infrastructure as European biofuel mandates are raised in 2026 and 2027. Higher blending requirements are expected to support demand for rapeseed and provide some stability to prices. That dynamic is becoming increasingly important because German domestic rapeseed production currently covers only about 40 per cent of the requirements of the country's oil mills.

The result is a tightly connected supply chain in which domestic farmers, seed breeders, traders, oilseed processors and biodiesel producers all have a stake in the availability and price of rapeseed. For Germany, the strategic importance of the crop extends well beyond exports. Rapeseed provides raw material for food products, animal feed and biodiesel, while its processing supports a sizeable domestic industrial base. The falling export numbers therefore tell only part of the story. Germany may be shipping less rapeseed oil abroad, but demand from within the European biofuel market is creating another outlet for the crop.

As EU biofuel mandates rise, competition for rapeseed could intensify further. For farmers, processors and biodiesel producers, that could provide support for prices while also increasing the importance of securing reliable supplies. The challenge for Germany will be balancing these competing demands. With domestic production unable to meet the full requirements of its crushing industry, the country's rapeseed economy will remain closely tied to international supply, trade flows and European renewable-fuel policy.