

Supply and Demand

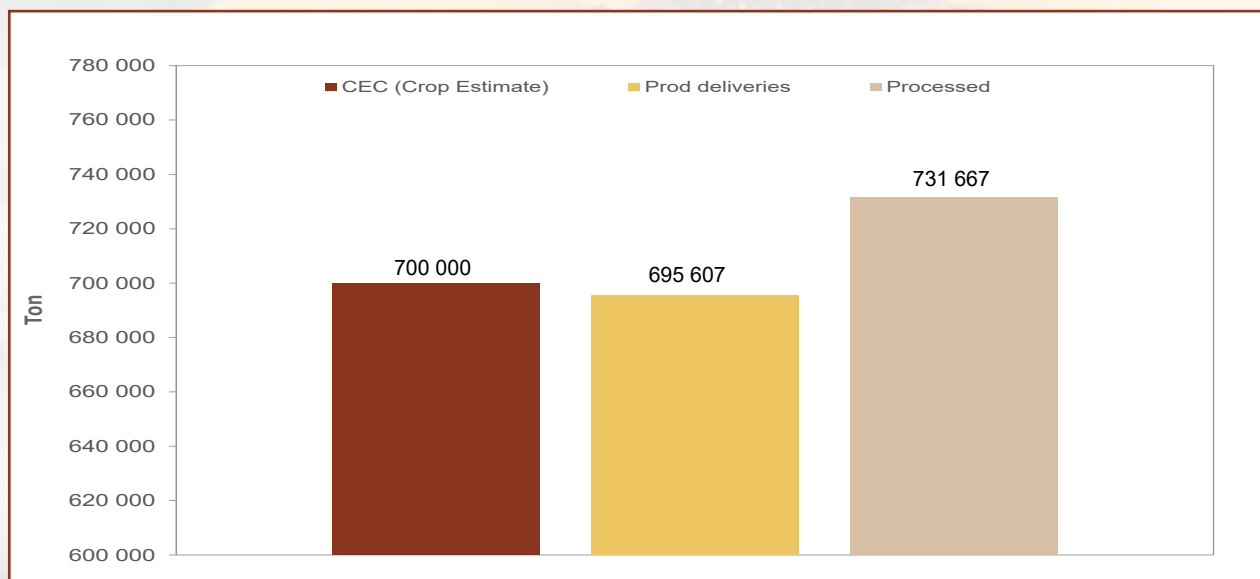
The sunflower seed marketing season dates from March to February. According to SAGIS supply and demand figures for the 2025/26 marketing season (March – January), opening stock declined by almost 43% compared to the previous marketing season. It is also 28% (27 774 tons) lower than the 10-year average.

45 619 tons of sunflower and sunflower seed products were imported compared to the 1 423 and 12 793 tons of the previous two seasons respectively. The 10-year import average is 13 179 tons. Of the 731 667 tons of sunflower seeds processed for the local market so far this season, 1 822 tons (0.2%) was used for human consumption and 5 888 tons (0.8%) for animal feed.

Sunflower and canola are crushed predominantly for the vegetable oil market to produce oil and oilcake. The quantity of sunflower seeds crushed during the season to date, namely 723 957 tons, is 7% more than during the previous season, but almost 5% (34 997 tons) lower than the 10-year average.

Exports for the 2025/26 season amounted to 15 380 tons, compared to the 7 637 and 68 tons of the previous two seasons. The 10-year export average is 1 106 tons. This year's export total is also the highest since the 79 400 tons in the 2008/09 season.

Globally, Russia, followed by Argentina, Ukraine and the United States were the largest exporters of sunflower seeds during the 2024/25 season. Ukrainian exports showed a sharp decline over the last two seasons. Russia (4.9 million metric tons) and Ukraine (4.5 million metric tons) accounted for 67% of total sunflower oil exports worldwide in the corresponding period (*National Sunflower Association website www.sunflowernsa.com, Table updated January 14, 2026; Source: Oil World & USDA*).



Graph 11: Sunflower supply and demand overview for the current marketing season (Mar 2025 - Feb 2026)

Information provided by SAGIS.