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GAIN Global Agricultural Information Network

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Post: Madrid

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Report Highlights:

The EU's MY 2026/27 corn crop faces steep downward revisions across Western and Central Europe due to heat and drought. Irrigation in Spain and Portugal, and favorable conditions in Bulgaria and Romania, only partially compensate the overall decline. With EU production falling short and Ukrainian supply access temporarily constrained, a combination of alternative feed grains as well as corn imports, particularly from the United States and Brazil, are expected to rise to fill the gap, even as total consumption contracts more than previously forecast.

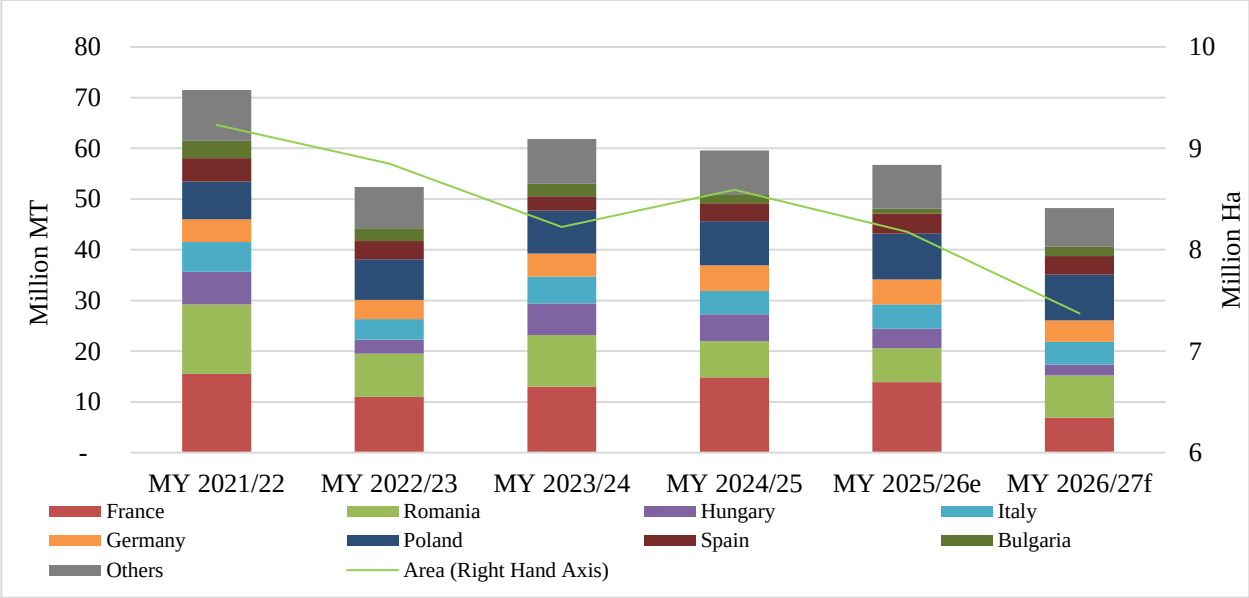
Disclaimer: This report presents an updated outlook for corn, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2026/27. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the EU and is not official USDA data.

Table 1. Production, Supply and Distribution – Corn

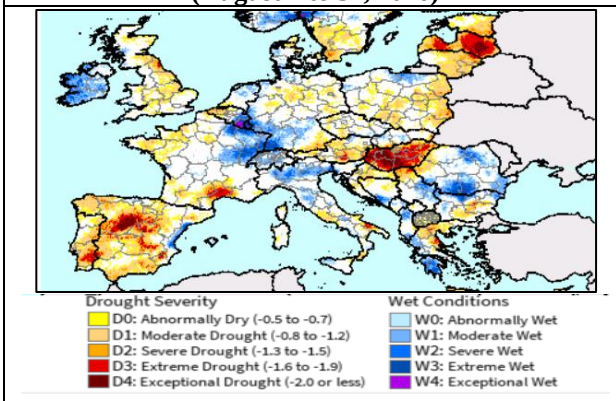
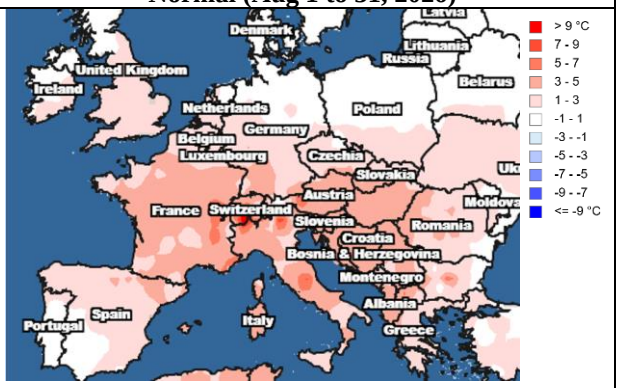
Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8,602	8,600	8,190	8,180	7,450	7,400
Beginning Stocks (1000 MT)	7,259	7,259	6,150	6,139	5,949	5,879
Production (1000 MT)	59,591	59,600	56,799	56,800	50,200	48,200
MY Imports (1000 MT)	18,761	18,761	18,500	18,800	23,500	23,200
TY Imports (1000 MT)	18,761	18,761	18,500	18,800	23,500	23,200
Total Supply (1000 MT)	85,611	85,620	81,449	81,739	79,649	77,279
MY Exports (1000 MT)	2,761	2,761	2,100	2,100	1,600	1,500
TY Exports (1000 MT)	2,761	2,761	2,100	2,100	1,600	1,500
Feed and Residual (1000 MT)	55,800	55,850	53,300	53,700	53,000	51,000
FSI Consumption (1000 MT)	20,900	20,870	20,100	20,060	20,000	19,700
Total Consumption (1000 MT)	76,700	76,720	73,400	73,760	73,000	70,700
Ending Stocks (1000 MT)	6,150	6,139	5,949	5,879	5,049	5,079
Total Distribution (1000 MT)	85,611	85,620	81,449	81,739	79649	77,279
Yield (MT/HA)	6.9276	6.9302	6.9352	6.9438	6.7383	6.5131
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Corn begins in October for all countries. TY 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts

Figure 1. EU Corn Area and Production



Source: FAS EU Posts estimates based on MS statistical sources.

Map 1. Drought Severity (August 1 to 31, 2026)	Map 2. Average Temperature Departure from Normal (Aug 1 to 31, 2026)
	

Source: IPAD/GMA/ FAS/USDA based on NOAA Climate Prediction Center data.

The EU's MY 2026/27 corn output estimate is revised down to 48.2 MMT. Downward production adjustments compared to the summer Post's estimates were reported in France, Germany, Hungary, and Italy.

In France, the corn production will be the lowest since 1976 when a severe drought impacted French agriculture. French corn growers had already reduced their planting for 2026, after disappointing yields in 2025. The five consecutive heatwaves and the drought that started in May 2026 scorched pastureland and corn fields altogether. Even irrigated corn fields (about 34 percent of total corn grain areas) were impacted as local authorities severely restricted irrigation to save drinkable water for the population. Cattle farmers, notably dairy farmers - facing a forage shortage for MY 2026/27 as stocks of hay are diminishing - have started to harvest corn planted for grain as silage corn, further lowering the corn grain area. In addition, excessive temperature at flowering severely reduced the pollination, leaving corn cobs less than half filled. Thus, the French corn yield is expected to be below 6.5 MT /Ha (256 bushels per acre), 10 percent down from the July estimate and 30 percent below the 5-year average.

In Germany and the North of Italy, excessive heat and drought have resulted in a significant decline in yields. As such, production levels are expected lower despite a larger area planted to corn. In the case of Hungary, a smaller planted area combined with lower yields is pushing MY 2026/27 production levels down. Croatia's hot and dry summer significantly damaged corn yields and is expected to have slashed production levels, limiting the country's exportable supply.

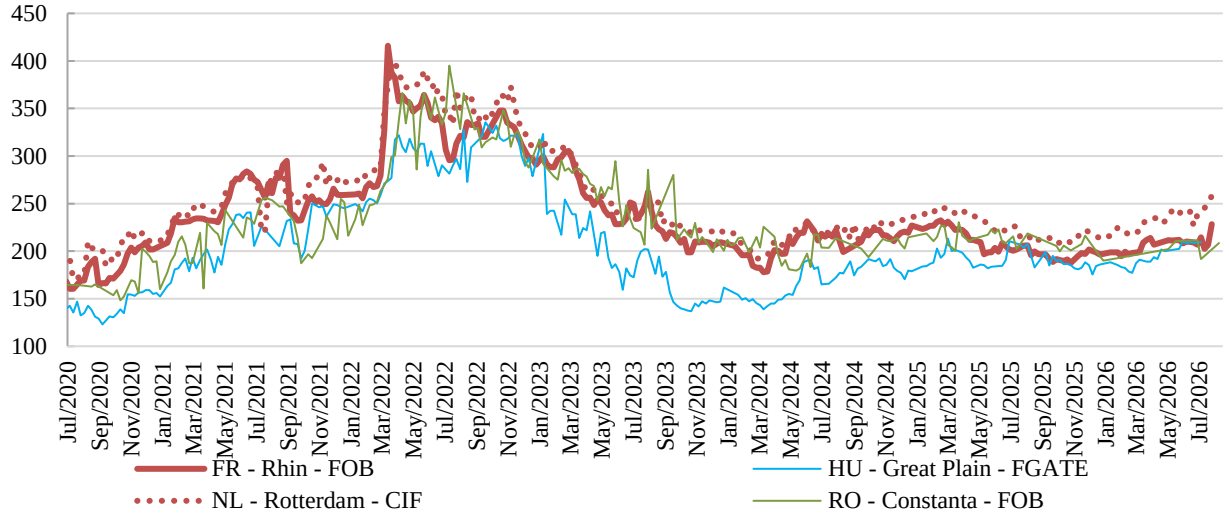
Unlike Western and Central Europe, where excessive heat and drought have collapsed yields, Spain and Portugal—where virtually all grain corn is grown under irrigation—are forecast to hold stable yields relative to early-summer estimates. Persistent spring rain delayed plantings and pushed farmers toward shorter-cycle varieties. Moreover, high input costs kept area from expanding despite ample water supplies, and summer heat waves increased irrigation needs.

Likewise, Romania and Bulgaria's MY2026/27 corn outlook reflects a smaller planted area offset by improved crop conditions and yield potential, a change after three grain seasons marked by severe droughts and heat waves trimming yields.

MY 2026/27 EU corn consumption is forecast to contract further than previously anticipated. Feed use, which is the largest consumption category is expected to amount to 51 MMT, down from the 53.7 MMT estimated for MY 2025/26, because of the short EU crop, combined the constrains faced when sourcing corn from Ukraine or through the Danube River. Other factors include the overall feed demand contraction[1], as well as increased competitiveness of alternative feed ingredients such as winter grains. That said, even though corn prices are significantly above wheat and barley's, its consumption in feed is expected to remain steady. Wheat, with a comparatively lower energy content, and barley, given its limited availability, cannot fully replace corn in the feed formula.

The moderate increase in FSI (Food, Seed and Industrial uses) [2] anticipated in the summer Post's estimates is expected to be negated in the context of higher prices anticipated.

Figure 2. EU Corn Prices (Euros/MT)



Source: EU Commission based on Member States notification according to Regulation (EU) 2017/1185.

EU corn imports in MY 2026/27 are forecast to reach 23.2 MMT, well above the previous season's volume. This increase reflects the sharp downward revision to the EU's domestic corn crop, which is only partially offset by ample carry-in stocks of winter grains from MY 2025/26, and the partial replacement of corn in the feed formula. Given the challenges Ukraine faces in sustaining grain export flows, the United States is expected to play a key role in supplying the EU market, despite a somewhat smaller U.S. corn crop projected for MY 2026/27. Similarly, Brazil's *safrinha* corn is expected to help bridge the gap between MY 2025/26 and MY 2026/27 until Ukraine's logistical constraints are resolved.

[1] Additional information regarding animal sector trends can be consulted in the most recent in the most recent EU Poultry, Livestock and Dairy GAIN reports.
[2] Including food, starch and bioethanol production. For additional information on biofuels in the EU, please consult the latest EU Biofuels Report and in the latest Biofuel Mandates in the EU by Member State.

During the summer months, in MY 2025/26, Brazil started taking a prominent role as an additional EU supplier of corn, as a result of a combination of the standstill in Odesa ports due to the intensification of the conflict with Russia, together with the extremely low water level in the Danube River as a consequence of the severe heatwave hitting Europe. Similarly, corn imports from the United States remained steady throughout the summer season.

Figure 3. Accumulated U.S. Corn Exports to the EU (MMT)

Source: Export Sales Report

Figure 4. Main Corn Suppliers to the EU (MMT)

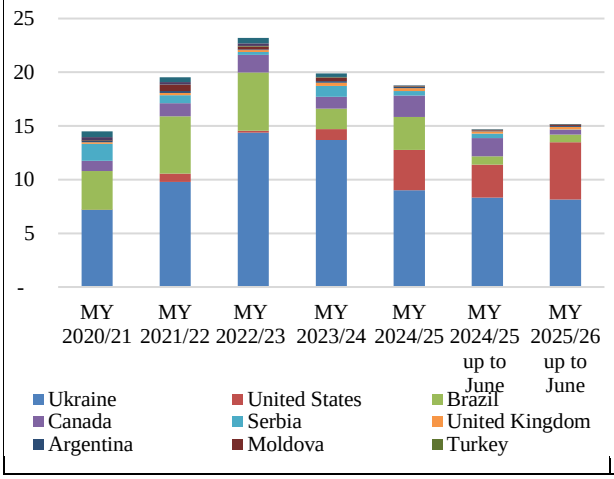
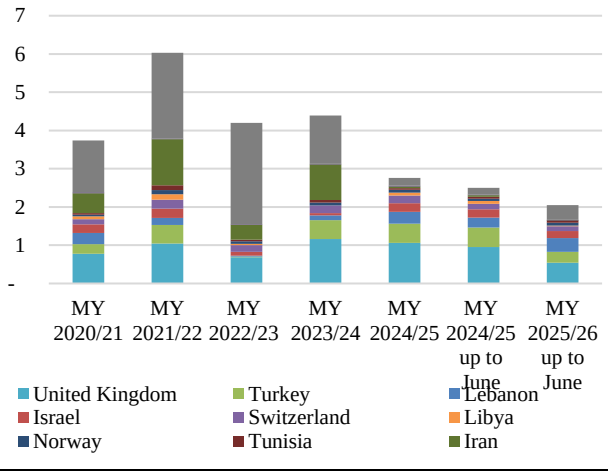


Figure 5. Main EU Corn Destinations (MMT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Despite the increased production level in MY 2026/27 in Southeastern Europe, which is a major exporting region, corn exports potential is limited by the sharp supply deficit in other Member States. MY 2025/26 exports were maintained at their previous level based on the trade flows reflecting EU corn competitiveness in North Africa and the Middle East. The low domestic crop leads to a further tightening of the ending inventory in MY 2026/27, despite the significant increase in imports. The low domestic crop leads to a further tightening of the ending inventory in MY 2026/27, despite the significant increase in imports.

Abbreviations used in this report

CY	Calendar Year
e	Estimate (of a value/number for the current, not yet completed, marketing year)
EU	European Union (Current EU-27, without the UK).
f	Forecast (of a value/number for the next, not yet started, marketing year)
FAS	Foreign Agricultural Service
Ha	Hectares
HRI	Hotels, Restaurants, and Institutions
IPAD	International Production Assessment Division
FSI	Food, Seed, and Industrial
MMT	Million Metric Tons
MS	EU MS(s)
MT	Metric Ton (1000 kg)
MY	Marketing Year for corn follows an October to September calendar
TMT	Thousand Metric Tons
TY	Trade Year. July to June for wheat, October to September for coarse grains, and January to December for rice

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Related Reports

Title	Date
EU Grain and Feed Quarterly Report 2026	07/20/2026
Excessive Rain and Heat Drive Down Grain Output in Spain	06/11/2026
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Attachments:

No Attachments.