USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** July 15, 2021

Report Number: E42021-0058

Report Name: EU Grain Situation Update

Country: European Union

Post: Madrid

Report Category: Grain and Feed

Prepared By: Marta Guerrero, Xavier Audran, Ornella Bettini, Monica Dobrescu, Gellert Golya, Mira Kobuszynska and György Mudri.

Approved By: Christopher Riker

Report Highlights:

MY2021/22 EU total grain production is now anticipated at 293.3 MMT. Abundant rainfall in April and May, while bad for timely spring planting operations, improved soil moisture across the EU and alleviated drought concerns. However, mild temperatures have delayed growth across the EU, putting pressure on the new crop.

Disclaimer: This report presents an updated outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2021/22. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the European Union (EU) and is not official USDA data.

Table of Contents:

Note: Effective January 1, 2021, the separation of the United Kingdom (UK) from the European Union (EU) is complete, including trade between both entities. In this report, and if not otherwise indicated, the EU term represents the current EU-27 (without the UK).

Abbreviations used in this report

Benelux	Belgium, the Netherlands and Luxemburg
Coarse Grains	Threshed, dry seeds of plant, cultivated for human/and or animal consumption and gathered in the dried, unprocessed state upon maturity. Is the total of corn, barley, rye, oats, mixed grains, and sorghum.
e	Estimate (of a value/number for the current, not yet completed, marketing year)
f	Forecast (of a value/number for the next, not yet started, marketing year)
FAS	Foreign Agricultural Service
Ha	Hectares
IPAD	International Production Assessment Division
MMT	Million Metric Tons
MS	EU Member State(s)
MT	Metric Ton (1000 kg)
MY	Marketing Year. Begins with the month listed at the top of each column. MY is July to June fall all grains, except for corn which follows an October to September, and rice which follows a September to August 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.
U.S.	United States

Executive Summary

Total Grains[1]	2019/2020		2020/2021		2021/2022	
Market Begin Year	Jul 2019		Jul 2020		Jul 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	53,104	52,363	52,408	52,283	52,745	52,577
Beginning Stocks	30,305	30,305	27,001	26,835	22,528	22,516
Production	291,467	291,056	279,075	279,975	291,600	293,275
MY Imports	24,973	24,952	18,295	20,377	22,215	22,317
TY Imports	24,225	24,214	18,295	20,382	22,215	22,317
TY Imp. from U.S.	1,030	1,042	0	909	0	909
Total Supply	346,745	346,313	324,371	327,187	336,343	338,108
MY Exports	53,416	53,428	41,845	41,593	45,645	45,095
TY Exports	53,258	53,258	41,945	41,293	45,645	45,095
Feed and Residual	165,150	164,934	158,650	162,268	164,300	164,734
FSI Consumption	101,178	101,116	101,348	100,810	101,526	101,476
Total Consumption	266,328	266,050	259,998	263,078	265,826	266,210
Ending Stocks	27,001	26,835	22,528	22,516	24,872	26,803
Total Distribution	346,745	346,313	324,371	327,187	336,343	338,108
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

The EU total grain[1] planted area in MY2021/22 is revised slightly lower than previous estimates due to lower-than-anticipated plantings across the EU Member States, but still higher than the previous season's levels (**Graph 1**). Wheat plantings increased but prospects for corn deteriorated due to persistent rains during the sowing season in France, Bulgaria, Poland, and Austria. Rains also adversely impacted sorghum plantings in France. A lower rice area is also anticipated, driven by reduced plantings caused by irrigation water restrictions in Spain, and, to a much lesser extent, Portugal.

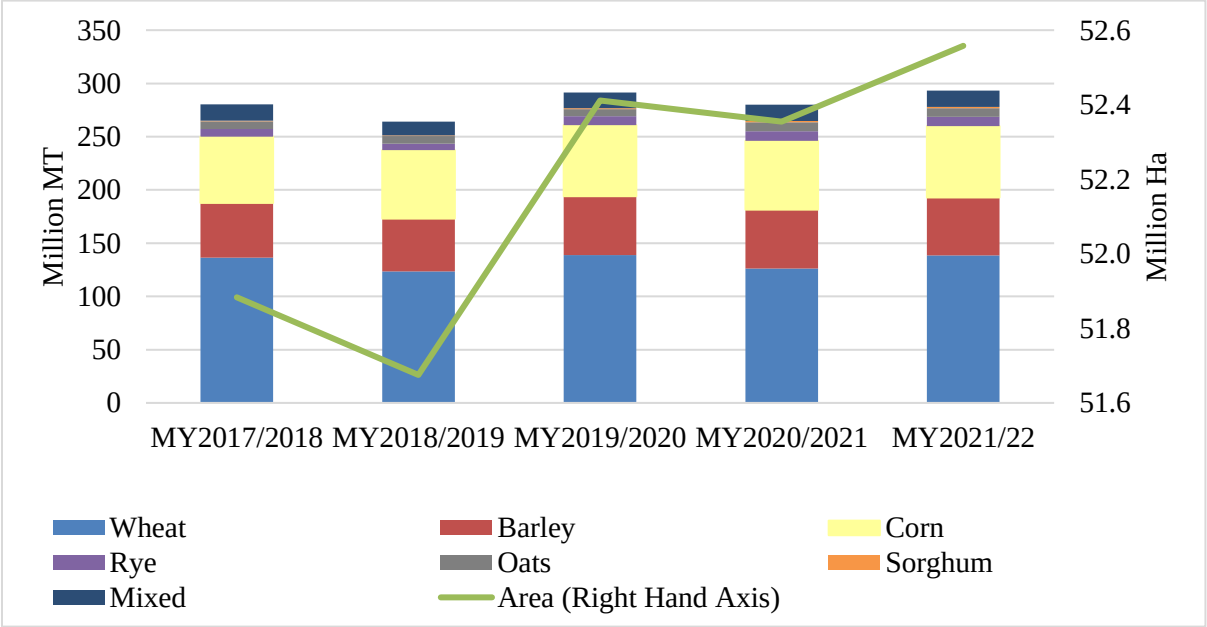
MY2021/22 EU grain production is forecast at 293.3 MMT, over 13 MMT higher than the previous marketing year's volume (**Graph 1**). Grain production is set to rebound in France, Germany, Romania, Hungary, the Benelux, Bulgaria, and Ireland. These countries benefited from spring rains, after witnessing their yields severely hit by dry conditions the previous season. Rains in April and May replenished soil moisture (**Map 1**) and improved yield potential. The slow-down in crop development, caused by cooler-than-average temperatures in April and May, was partially alleviated by warmer temperatures registered in June (**Map 2**). June's hailstorms scattered throughout the EU's territory are not anticipated to have a significant impact on overall yields. However, grain production in Italy, Greece, and Portugal is only expected to register marginal production increases.

[1] Total grains is the sum of wheat, barley, corn, rye, sorghum, oats and mixed grains.

In the Nordics (Sweden, Denmark, and Finland), only Finland is expected to realize a larger output, while a smaller production volume is expected in Denmark and Sweden due to significant reductions in the harvested area for barley and oats, respectively. Spain expects to realize the largest production decline among EU Member States, but this is because the country is projected to realize slightly higher-than-average yields after registering record yields in MY2020/21. Likewise, in Poland and the Baltic Countries (Latvia, Lithuania, and Estonia), the combination of a reduced planted area and a return to average yields is anticipated to drive grain production down. However, the grain output in these countries is still very much dependent on summer weather conditions.

In central Europe (Czech Republic, Slovakia, Austria, and Slovenia) the smaller planted area and the unusually cold temperatures in May are expected to reduce production volumes, and the heatwave in Croatia in June that exceeded 85 degrees (Fahrenheit), is anticipated to adversely affect output. While permanent crops were the most affected, field crops may also suffer the effects of the tornado that hit the Czech Republic in late June.

Graph 1. EU Grains Area and Production



Source: FAS EU Posts.

The EU's grain demand was heavily influenced by: the disruption in consumption that the coronavirus (COVID-19) pandemic caused, the state of animal health in the EU and in key livestock product export markets such as China, and the changes in international feed grain prices.

While the impact of the new COVID-19 variants needs to be closely monitored, the EU's domestic grain demand is expected to witness a post-COVID recovery in MY2021/22. Food uses for grain are anticipated to continue to recover as social interactions, the Hotels, Restaurants, and Institutions (HRI) sector, and tourism progressively resume increasingly normal activity patterns.

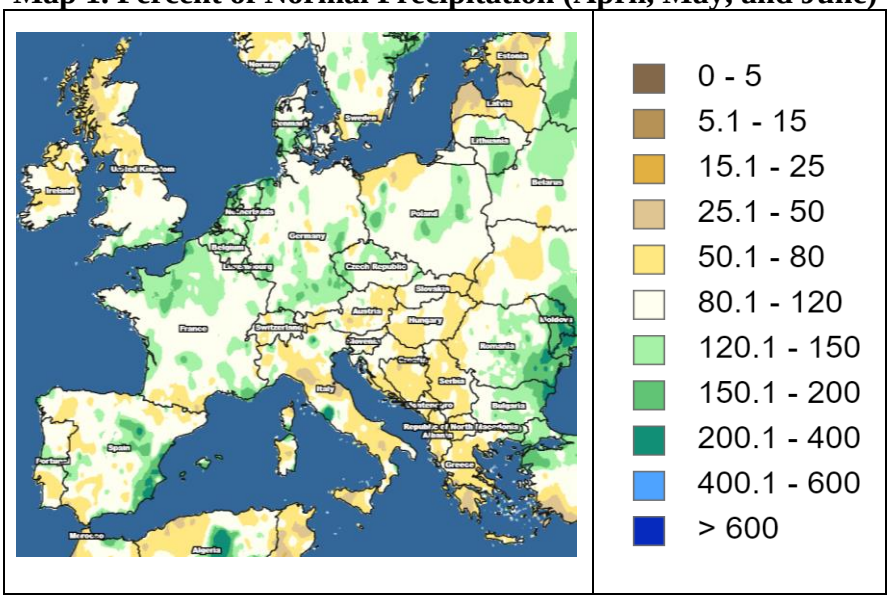
For the same reasons, industrial usage of grains is also projected to recover in MY2021/22, as mobility restrictions are eased. Additional information regarding EU's Bioethanol Sector is available in the latest EU Biofuels Report and in the latest Biofuel Mandates in the EU by Member State.

Despite continued opportunities for EU livestock product exports, the ongoing surge in commodity prices may limit the EU compound feed industry's ability to expand in MY2021/22. Additional information regarding feed demand trends is available in the most recent EU Livestock and Poultry GAIN reports.

Nevertheless, the sizeable MY2021/22 EU crop should provide some cushion for the bloc. Citing concerns regarding Brazil's *safrinha* corn supplies, leading EU feed grain consumers are anticipated to increasingly make use of domestic and intra-EU purchased grains in the first quarter of MY2021/22. If Ukraine's grain production forecast is realized, Ukrainian exports could help to ease tensions in the EU grain market (beginning in the fourth quarter of 2021).

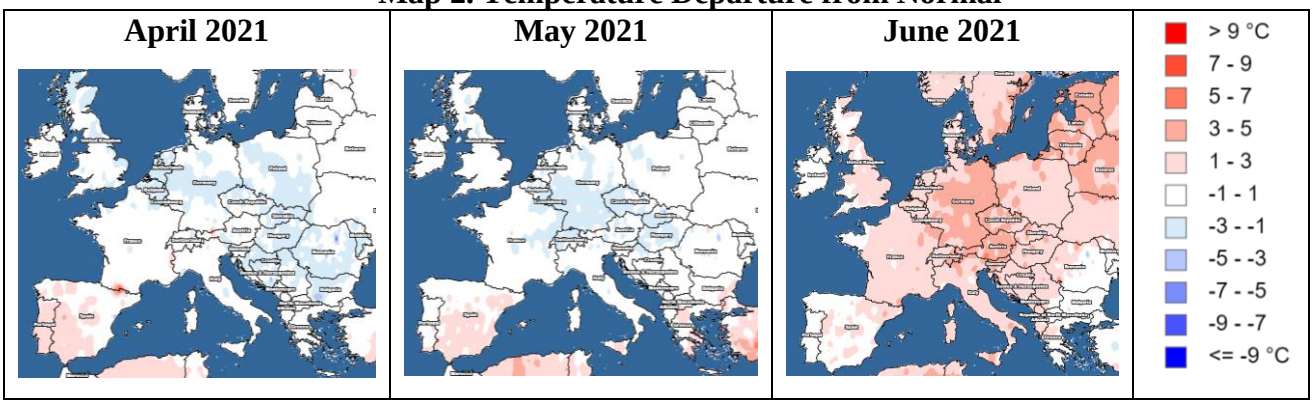
The above-average MY2021/22 EU crop outlook is expected to bolster stocks as tight supplies and favorable prices for grains incentivized farmers, cooperatives, and private elevators to sell their domestic grain stocks in MY2020/21.

Map 1. Percent of Normal Precipitation (April, May, and June)



Source: IPAD/GMA/ FAS/USDA

Map 2. Temperature Departure from Normal



Source: IPAD/GMA/ FAS/USDA

Section I. Wheat

Wheat	2019/2020		2020/2021		2021/2022	
Market Begin Year	Jul 2019		Jul 2020		Jul 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	24,362	23,720	23,083	23,040	23,930	23,950
Beginning Stocks	15,798	15,798	12,623	12,583	9,065	9,483
Production	138,741	138,700	125,942	126,300	138,200	138,400
MY Imports	5,550	5,551	5,600	5,660	5,800	5,400
TY Imports	5,550	5,551	5,600	5,660	5,800	5,400
TY Imp. from U.S.	1,025	1,026	0	900	0	900
Total Supply	160,089	160,049	144,165	144,543	153,065	153,283
MY Exports	39,766	39,766	30,750	31,000	34,000	33,400
TY Exports	39,766	39,766	30,750	31,000	34,000	33,400
Feed and Residual	45,500	45,500	42,000	42,000	45,500	45,200
FSI Consumption	62,200	62,200	62,350	62,060	62,500	62,600
Total Consumption	107,700	107,700	104,350	104,060	108,000	107,800
Ending Stocks	12,623	12,583	9,065	9,483	11,065	12,083
Total Distribution	160,089	160,049	144,165	144,543	153,065	153,283
Yield	5.6950	5.8474	5.4560	5.4818	5.7752	5.7787
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

The EU wheat area in MY2021/22 has been increased compared to previous estimates due to higher than previously anticipated plantings in Austria, Bulgaria, Denmark, and Estonia -- projected to reach 138.4 MMT. The leading EU wheat producing countries are now expecting sizable crops, especially Bulgaria and Romania, which registered very poor yields in MY2020/21. Spain, however, is an exception as wheat yields are anticipated to fall below the level of the previous year's bumper crop (with a return to average levels).

In MY2021/22, wheat sowings were carried out under good conditions, with adequate moisture levels in France, Germany, and other western EU Member States. Winter was cold, but snow cover limited the impact of winterkill to very small areas. Moreover, the moderate cold snaps in late winter contributed to reduced pest infestations. Similarly, no winterkill was reported in Poland or the Baltic States. While a cold wave in early April swept throughout Europe, with nighttime temperature reaching below 14

degrees (Fahrenheit) in Poland and France, damages were limited to very few fields exposed to the northern winds (thus limiting losses). The colder-than-average and rainy early spring throughout Europe replenished underground water, boosted soil moisture, but slowed wheat plant development. While it is too early to fully assess the damage, frequent thunderstorms and hailstorms in June may have locally impacted some fields without impacting the EU-wide forecast. All-in-all, a delayed but above-average wheat harvest is expected in almost all EU wheat producing countries. If there is no typical July heat wave that stops the filling of grains, the current production estimate may have to be raised further.

With a higher wheat crop, albeit not as high as in MY2019/20, EU wheat imports are revised down for MY2021/22. However, given the smaller EU durum crop, Italy is now expected to import more durum and hard wheat in MY2021/22. Likewise, in MY2021/22 the increased wheat production is anticipated to allow for EU wheat exports and feed use to increase by 6.5 percent and 9 percent, respectively, compared to MY 2020/21 levels (and still leave room for a marginal recovery of ending stocks).

Section II. Coarse Grains

Corn

Corn	2019/2020		2020/2021		2021/2022	
Market Begin Year	Oct 2019		Oct 2020		Oct 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	8,907	8,878	8,982	9,040	8,900	8,850
Beginning Stocks	7,644	7,644	7,575	7,533	6,950	6,753
Production	66,735	66,693	63,975	64,500	66,700	66,850
MY Imports	17,384	17,384	11,200	13,300	15,000	15,500
TY Imports	17,384	17,384	11,200	13,300	15,000	15,500
TY Imp. from U.S.	3	14	0	9	0	9
Total Supply	91,763	91,721	82,750	85,333	88,650	89,103
MY Exports	5,388	5,388	3,300	2,900	4,300	4,500
TY Exports	5,388	5,388	3,300	2,900	4,300	4,500
Feed and Residual	59,000	59,000	52,700	56,000	57,000	57,000
FSI Consumption	19,800	19,800	19,800	19,680	19,900	19,785
Total Consumption	78,800	78,800	72,500	75,680	76,900	76,785
Ending Stocks	7,575	7,533	6,950	6,753	7,450	7,818
Total Distribution	91,763	91,721	82,750	85,333	88,650	89,103
Yield	7.4924	7.5122	7.1226	7.1350	7.4944	7.5537
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

Following reduced harvested area estimates for Poland, France, Bulgaria, and Austria, the EU corn area for MY2021/22 has been revised down to 8.85 million Ha, as spring precipitation prevented prospective plantings from fully materializing. Nevertheless, the EU production estimate is revised up to 66.8 MMT based on strong crop prospects for Poland, Croatia, France, Romania, Germany, Spain, Slovakia, and Italy. Small production declines are anticipated in Austria and Belgium.

As noted, spring precipitation resulted in delayed corn plantings across the EU (France, Romania, Hungary, Bulgaria, Poland). However, the abundant rainfall alleviated concerns over drought in central Europe – improving soil moisture levels in most European countries and favoring faster germination and

growth. Warm conditions in June, accompanied by good sunshine and rainfall, further accelerated plants growth, and partially compensated for the delayed plantings.

MY2021/22 corn imports are expected to decline, given the ample supply of domestic grains and corn's reduced price-competitiveness in the feed formula in Spain, Germany, France, and the Netherlands, counterbalancing the potential feed use increases in Italy and the Czech Republic. The minor increase in exports can be almost entirely attributed to Romania's production recovery.

MY2020/21 EU corn imports are revised down to 13.3 MMT, over supply concerns for Brazil's second corn crop. Food, seed, and industrial use (FSI) has been slightly reduced, when compared to previous estimates, due to lower than anticipated corn industrial processing in MY2020/21 (most notably in Italy, Bulgaria, France, and Slovakia). The lower feed corn use is driven largely by Spain, which is expected to shift towards increasingly using domestic and intra-EU purchased grains in its feed formula in MY2020/21.

Barley

Barley	2019/2020		2020/2021		2021/2022	
Market Begin Year	Jul 2019		Jul 2020		Jul 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	11,172	11,211	11,387	11,355	11,025	10,975
Beginning Stocks	5,457	5,457	5,297	5,247	5,080	5,072
Production	55,270	55,220	55,283	55,325	54,800	54,500
MY Imports	1,837	1,837	1,400	1,350	1,300	1,300
TY Imports	1,089	1,089	1,400	1,350	1,300	1,300
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	62,564	62,514	61,980	61,922	61,180	60,872
MY Exports	7,767	7,767	7,500	7,300	7,000	6,850
TY Exports	7,579	7,579	7,600	7,000	7,000	6,850
Feed and Residual	36,700	36,700	36,800	37,000	36,500	36,200
FSI Consumption	12,800	12,800	12,600	12,550	12,600	12,700
Total Consumption	49,500	49,500	49,400	49,550	49,100	48,900
Ending Stocks	5,297	5,247	5,080	5,072	5,080	5,122
Total Distribution	62,564	62,514	61,980	6,1922	61,180	60,872
Yield	4.9472	4.9255	4.8549	4.8723	4.9705	4.9658
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

The EU barley harvested area has been revised down to 10.9 million Ha driven by a smaller planted area in France, Spain, Germany, and Denmark, and, to a lesser extent, in Finland, Austria, and Romania. Favorable growing conditions in France and Germany are expected to lead to improved yields in these countries, that could offset the reduction in yields anticipated for Spain, Denmark, and Poland. Despite the higher yields forecasted in some Member States, the smaller barley planted area is anticipated to prevent a rebound in production, which we now forecast will total 54.5 MMT.

In Germany and France, the EU's leading barley producing Member States, weather conditions were favorable despite spring temperatures falling below seasonal averages. In the case of Spain, Denmark and Sweden, reduced production is anticipated due to a smaller planted area and the unlikeliness of last

year's record yields being repeated. In Poland, lower barley yields are expected due to late sowings and delays in crop development due to cooler spring temperatures.

In MY2021/22, feed barley consumption of is expected to be below previous levels, given reduced domestic availability and price competition expected from feed wheat. A slight recovery is expected in FSI use as starch, food-service, and brewing use is expected to begin to recover with the advancing COVID-19 vaccination campaigns. Barley imports are projected to fall to 1.3 MMT in MY2021/22 due to increased competitiveness from alternative EU and imported grains. Likewise, barley exports in MY2021/22 are forecast to decrease to 6.8 MMT, as the main export competitors (such as Ukraine and the United Kingdom) regain competitiveness in the Asia, North Africa and Middle East markets.

EU exports are estimated to have decreased to 7.3 MMT in MY2020/21 as livestock and feed industry demand declined and ending stocks in the main producing countries (Germany, France, and Spain) tightened.

Rye

Rye	2019/2020		2020/2021		2021/2022	
Market Begin Year	Jul 2019		Jul 2020		Jul 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	2,207	2,208	2,225	2,223	2,200	2,170
Beginning Stocks	513	513	551	596	431	488
Production	8,396	8,400	9,115	9,120	8,300	8,940
MY Imports	4	4	25	2	5	2
TY Imports	0	1	25	2	5	2
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	8,913	8,917	9,691	9,718	8,736	9,430
MY Exports	262	261	160	160	125	130
TY Exports	274	274	160	160	125	130
Feed and Residual	4,800	4,800	5,700	5,700	5,000	5,300
FSI Consumption	3,300	3,260	3,400	3,370	3,250	3,270
Total Consumption	8,100	8,060	9,100	9,070	8,250	8,570
Ending Stocks	551	596	431	488	361	730
Total Distribution	8,913	8,917	9,691	9,718	8,736	9,430
Yield	3.8043	3.8043	4.0966	4.1026	3.7727	4.1198
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

Oats

Oats	2019/2020		2020/2021		2021/2022	
Market Begin Year	Jul 2019		Jul 2020		Jul 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	2,368	2,240	2,575	2,460	2,500	2,500
Beginning Stocks	371	371	321	269	475	209
Production	6,954	6,520	8,249	8,100	7,450	7,980
MY Imports	114	92	50	40	80	55
TY Imports	113	100	50	50	80	55
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	7,439	6,983	8,620	8,409	8,005	8,244
MY Exports	218	231	120	220	200	205
TY Exports	235	235	120	220	200	205
Feed and Residual	5,600	5,200	6,600	6,600	6,000	6,400
FSI Consumption	1,300	1,283	1,425	1,380	1,450	1,340
Total Consumption	6,900	6,483	8,025	7,980	7,450	7,740
Ending Stocks	321	269	475	209	355	299
Total Distribution	7,439	6,983	8,620	8,409	8,005	8,244
Yield	2.9367	2.9107	3.2035	3.2927	2.9800	3.1920
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

Mixed Grains

Mixed Grains	2019/2020		2020/2021		2021/2022	
Market Begin Year	Jul 2019		Jul 2020		Jul 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	3,928	3,916	3,956	3,940	4,000	3,930
Beginning Stocks	419	419	592	574	493	477
Production	14,523	14,500	15,501	15,450	15,100	15,490
MY Imports	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	14,942	14,919	16,093	16,024	15,593	15,967
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	12,600	12,600	13,850	13,800	13,300	13,500
FSI Consumption	1,750	1,745	1,750	1,747	1,800	1,755
Total Consumption	14,350	14,345	15,600	15,547	15,100	15,255
Ending Stocks	592	574	493	477	493	712
Total Distribution	14,942	14,919	16,093	16,024	15,593	15,967
Yield	3.6973	3.7028	3.9184	3.9213	3.7750	3.9415
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

Sorghum

Sorghum	2019/2020		2020/2021		2021/2022	
Market Begin Year	Jul 2019		Jul 2020		Jul 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	160	190	200	225	190	202
Beginning Stocks	103	103	42	33	34	34
Production	848	1,023	1,010	1,180	1,050	1,115
MY Imports	84	84	20	25	30	60
TY Imports	89	89	20	20	30	60
TY Imp. from U.S.	2	2	0	0	0	0
Total Supply	1,035	1,210	1,072	1,238	1,114	1,209
MY Exports	15	15	15	13	20	10
TY Exports	16	16	15	13	20	10
Feed and Residual	950	1,134	1,000	1,168	1,000	1,134
FSI Consumption	28	28	23	23	26	26
Total Consumption	978	1,162	1,023	1,191	1,026	1,160
Ending Stocks	42	33	34	34	68	39
Total Distribution	1,035	1,210	1,072	1,238	1,114	1,209
Yield	5.3000	5.3842	5.0500	5.2444	5.5263	5.5198
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

Section III. Rice

Rice	2019/2020		2020/2021		2021/2022	
Market Begin Year	Sep 2019		Sep 2020		Sep 2021	
European Union	USDA Official	New Post EU	USDA Official	New Post EU	USDA Official	New Post EU
Area Harvested	417	417	420	420	407	407
Beginning Stocks	1,189	1,189	1,255	1,255	1,208	1,210
Milled Production	1,985	1,985	1,953	1,955	1,894	1,866
Rough Production	2,860	2,898	2,814	2,849	2,729	2,725
Milling Rate ,9999) units	6,940	6,850	6940	6,862	6,940	6,848
MY Imports	2,003	2,004	1,950	1,960	2,100	1,970
TY Imports	1,994	1,994	1,950	1,960	2,100	1,970
TY Imp. from U.S.	28	24	0	20	0	24
Total Supply	5,177	5,178	5,158	5,170	5,202	5,046
MY Exports	528	528	500	520	550	480
TY Exports	506	543	500	520	550	480
Consumption and Residual	3,394	3,395	3,450	3,440	3,500	3,470
Ending Stocks	1,255	1,255	1,208	1,210	1,152	1,096
Total Distribution	5,177	5,178	5,158	5,170	5,202	5,046
Yield (Rough)	6.8585	6.9496	6.7000	6.7833	6.7052	6.6953
(1000 HA), (1000 MT), (MT/HA)						

Source: FAS EU Posts.

Section IV. Policy

On November 2020, following the World Trade Organization's ruling that authorized countermeasures against U.S. subsidies to aircraft maker Boeing, the EU imposed an additional 25 percent tariff on certain agricultural products (Regulation (EU) 2020/1646). The preliminary list of products can be found in the link, and included:

- CN2018 – 10019900 - wheat and meslin (excl. seed for sowing, and durum wheat).
- CN 2018 – 11042908 - sliced, kibbled or otherwise worked barley grains (excl. rolled, flaked, hulled, pearled, and pellets and flour).
- CN 2018 – 11042917 - hulled, even sliced or kibbled cereal grains (excl. rice, oats, maize and barley).
- CN 2018 – 11042989 - cereal grains, sliced, kibbled or otherwise worked (excl. barley, oats, maize, wheat and rye, and rolled, flaked, flour, pellets, hulled, pearled, not otherwise worked than kibbled, and semi- or wholly milled rice and broken rice).

On March 2021, the United States and the EU agreed on a four-month suspension of these additional tariffs. In June 2021, the two parties agreed to a cooperative framework to address the large civil aircraft disputes. The agreement moves away from past confrontation in pursuit of a cooperative future by suspending the tariffs related to this dispute for five years.[2] For additional information regarding policies affecting grains, please consult the EU Grain and Feed Annual Report.

Related Reports

Title	Date
Lithuania: Grain and Feed Update	06/08/2021
Bulgaria: Grain and Feed Update	06/06/2021
Estonia: Grain and Feed Update	06/05/2021
Romanian Grain Production is Poised to Rebound	05/18/2021
Latvia Grain and Feed Update	04/26/2021
EU Grain and Feed Annual	04/16/2021

Acknowledgements

This report would not have been possible without the valuable expert contributions from the following Foreign Service analysts:

Xavier Audran, FAS/Paris covering France and wheat section author
Ornella Bettini, FAS/Rome covering Italy and rice section author
Mila Boshnakova, FAS/Sofia covering Bulgaria
Monica Dobrescu, FAS/Bucharest covering Romania and corn chapter author
Dimosthenis Faniadis, FAS/Rome covering Greece

[2] See https://ustr.gov/about-us/policy-offices/press-office/press-releases/2021/june/ustr-announces-joint-us-eu-cooperative-framework-large-civil-aircraft

Jana Fischer, FAS/Prague covering the Czech Republic and Slovakia
Bob Flach, FAS/The Hague covering the Netherlands, Finland, Denmark, and Sweden
Gellert Golya, FAS/Budapest covering Hungary and barley chapter author
Marta Guerrero, FAS/Madrid covering Spain and Portugal, executive summary and sorghum chapter author and report coordinator
Mira Kobuszynska, FAS/Warsaw covering Poland, Lithuania, Latvia, and Estonia, rye, oats, and mixed grains chapters' author
Roswitha Krautgartner, FAS/Vienna covering Austria and Slovenia
Sabine Lieberz, FAS/Berlin covering Germany
Andreja Misir, FAS/Zagreb covering Croatia
György Mudri, FAS/USEU/Brussels covering EU policy
Yvan Polet, FAS/USEU/Brussels covering Belgium and Luxembourg
Jennifer Wilson, FAS/London covering Ireland

Attachments:

No Attachments.