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**Report Highlights:**

Extreme weather conditions across the EU reduced grain production projections in MY 2023/24, although production is still anticipated to exceed MY 2022/23 levels. EU grain export expectations have deteriorated based on third country competition in North African markets. Total demand for grains is forecast down, resulting in lower overall import needs than in the previous season.

**Disclaimer:** This report presents an updated outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2023/24. 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.

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**Executive Summary**

**Table 1. Production, Supply and Distribution - Total Grains**

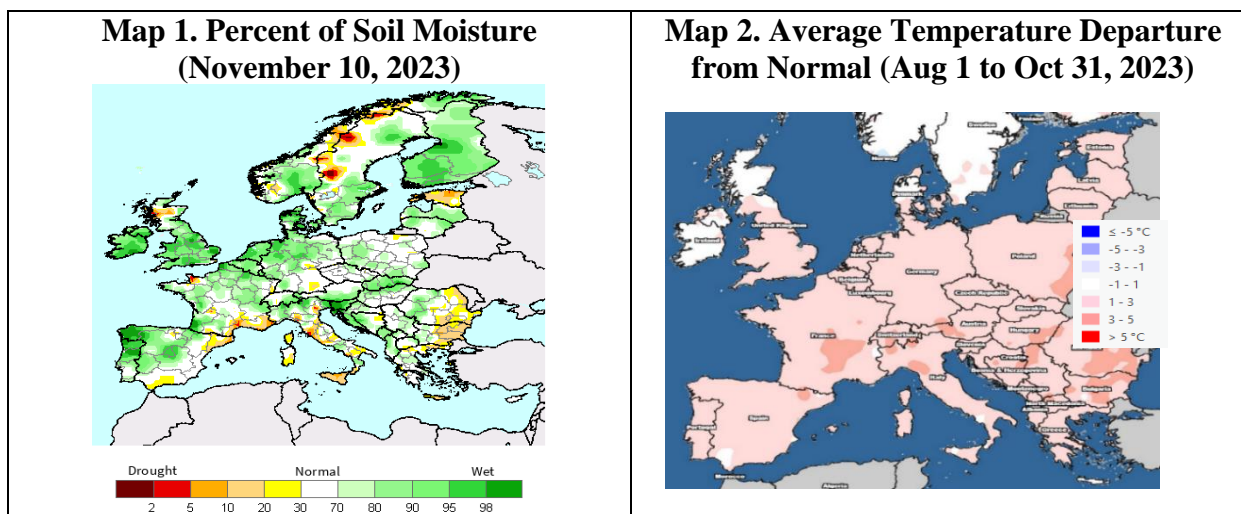
Total Grains <sup>1</sup>	2021/2022		2022/2023		2023/2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>European Union</b>						
<b>Area Harvested</b> (1000 HA)	51,991	51,954	50,920	50,886	50,148	50,292
<b>Beginning Stocks</b> (1000 MT)	25,207	25,207	31,931	32,147	31,188	29,080
<b>Production</b> (1000 MT)	293,000	292,917	267,123	267,687	270,430	269,000
<b>MY Imports</b> (1000 MT)	25,932	25,932	37,947	37,561	34,175	33,602
<b>TY Imports</b> (1000 MT)	26,202	26,209	38,118	37,701	33,975	33,097
<b>TY Imp. from U.S.</b> (1000 MT)	1,156	1,131	555	550	-	-
<b>Total Supply</b> (1000 MT)	344,139	344,056	337,001	337,395	335,793	331,682
<b>MY Exports</b> (1000 MT)	45,685	45,686	45,980	46,201	48,090	43,870
<b>TY Exports</b> (1000 MT)	44,745	44,742	45,799	46,037	48,385	44,280
<b>Feed and Residual</b> (1000 MT)	162,475	161,660	156,110	158,488	156,615	155,097
<b>FSI Consumption</b> (1000 MT)	104,048	104,563	103,723	103,626	104,748	104,450
<b>Total Consumption</b> (1000 MT)	266,523	266,223	259,833	262,114	261,363	259,547
<b>Ending Stocks</b> (1000 MT)	31,931	32,147	31,188	29,080	26,340	28,265
<b>Total Distribution</b> (1000 MT)	344,139	344,056	337,001	337,395	335,793	331,682

<sup>1</sup>“Total grains” is the sum of wheat, barley, corn, rye, sorghum, oats, and mixed grains.

Source: FAS EU Posts.

## MY 2023/24 EU Grain Production

Total EU grain production for MY 2023/24 is estimated at 269 MMT, above MY 2022/23 levels but down from the 292 MMT registered in MY 2021/22. The EU experienced extraordinarily extreme weather conditions ranging from a severe drought in Spain to abnormally warm and dry summer conditions in the EU's eastern grain production areas (Bulgaria and Romania), as well as cooler temperatures combined with summer precipitation in large grain producing Member States such as France, Germany, or Poland. This ultimately resulted in a 1 MMT downwards revision in the total EU grain output compared to Post's summer estimate.



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

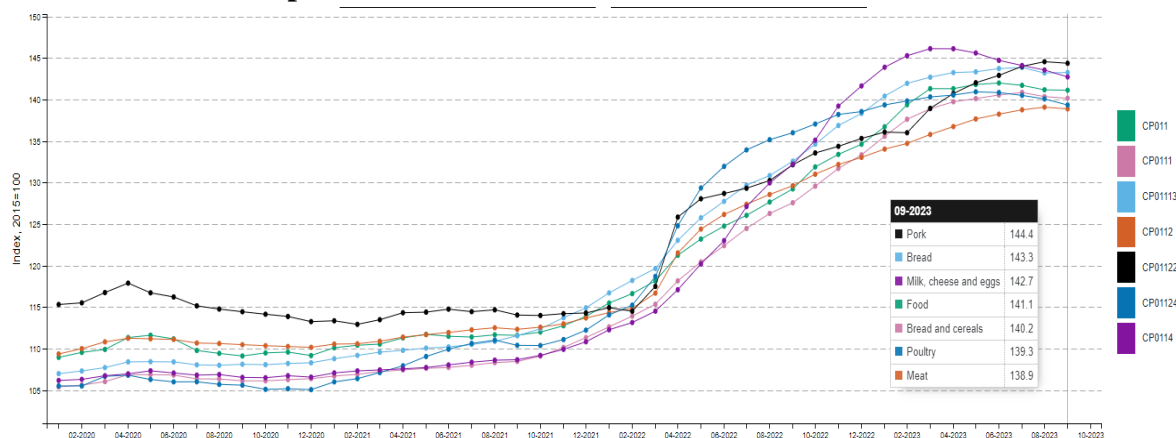
## MY 2023/24 EU Grain Consumption Trends

Post has revised down the EU's total grain consumption for MY 2023/24 to 155 MMT. Swine and cattle farmers are reducing animal inventories as they face shrinking production margins, increasing regulatory hurdles, and animal health issues. Likewise, EU dairy cow numbers are falling in line with the lower milk production profitability. Hog farms continue being affected by African Swine [Fever](#) (ASF) and Porcine Reproductive and Respiratory Syndrome (PRRS) outbreaks. [Bluetongue](#) and emerging [Epizootic Hemorrhagic Disease](#) (EHD) cases are also negatively affecting ruminant feed demand, especially in southern EU Member States. In the Netherlands and Belgium, stringent environmental regulations are also responsible for lower animal production. On a positive note, despite the export limitations that the [Highly Pathogenic Avian Influenza](#) (HPAI) outbreaks pose to EU poultry production, the EU's poultry sector feed demand continues to expand although at a low rate. An increasing preference for poultry meat by inflation-hit price-sensitive EU consumers and the surge in tourism-driven HRI activity<sup>2</sup> support the increase.

<sup>2</sup>Additional information regarding animal sector trends can be consulted in the most recent [EU Livestock](#), [Poultry](#) and [Dairy](#) Annual GAIN reports.

Food, Seed, and Industrial (FSI) uses in MY 2023/24 have been revised further up from MY 2022/23 as demand for grain-based industrial products such as starch, maltodextrin, glucose, ethanol<sup>3</sup>, DDGS and gluten continues to grow driven by mainly the expanded use of installed processing capacity in Hungary and Bulgaria. Within FSI uses, the higher industrial use compensates the reduction expected in food uses in MY 2023/24, as EU price-sensitive consumers are cutting their expenditure in food in response to the high grain-based food items price levels prevailing (See **Graph 1**).

**Graph 1. EU Harmonized Index of Consumer Prices**



Source: [EU's Food Price Monitoring Tool](#).

## MY 2024/25 EU Winter Grain Plantings

Early estimates indicate that the EU farmers may see their MY 2024/25 winter grain plantings reduced as EU Member States are facing unfavorable weather conditions in the sowing season. Abundant precipitations in fall have contributed to improve soil moisture and increase water storage in dams in the drought-hit Iberian Peninsula. However, persistently rainy conditions are causing delays in plantings the Benelux, Denmark, and Northern Germany. The adverse weather conditions in western Europe starting mid-October 2023, particularly in France, have brought winter grain plantings to a standstill because farmers could not access their waterlogged fields. This is particularly true in the best wheat producing regions of France such as Hauts de France and the Grand Est. Some analysts estimated that by mid-November, up to one third of the French wheat plantings were running behind schedule, which could negatively impact the crop potential later in the growing season. In Finland, excessive soil moisture is also conditioning winter grains sowings. Conversely, Romania and Bulgaria, Poland, Central EU countries (Czech Republic, Slovakia, Austria, Slovenia, and northern Italy) and Croatia to a lesser extent, report dry soil conditions negatively affecting MY 2024/25 plantings operations and winter grains emergence. The reduced crop margins in MY 2023/24, when farmers' liquidity was squeezed between rising input costs and plummeting output prices, may prompt a reduction in fertilizer and plant protection products use. While too early to assess, this may ultimately place downward pressure on yield potential.

<sup>3</sup>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](#).

## Section I. Wheat

**Table 2. Production, Supply and Distribution - Wheat**

Wheat	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
Market Year Begins						
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	24,294	24,280	24,383	24,350	24,220	24,360
<b>Beginning Stocks</b> (1000 MT)	10,698	10,698	13,310	13,550	16,519	14,000
<b>Production</b> (1000 MT)	138,160	138,190	134,185	134,010	134,300	134,440
<b>MY Imports</b> (1000 MT)	4,629	4,629	12,103	12,103	7,500	9,000
<b>TY Imports</b> (1000 MT)	4,629	4,629	12,103	12,103	7,500	9,000
<b>TY Imp. from U.S.</b> (1000 MT)	285	257	381	363	-	-
<b>Total Supply</b> (1000 MT)	153,487	153,517	159,598	159,663	158,319	157,440
<b>MY Exports</b> (1000 MT)	31,927	31,927	35,079	35,085	37,500	34,000
<b>TY Exports</b> (1000 MT)	31,927	31,927	35,079	35,085	37,500	34,000
<b>Feed and Residual</b> (1000 MT)	45,000	44,200	44,000	46,448	44,000	45,000
<b>FSI Consumption</b> (1000 MT)	63,250	63,840	64,000	64,130	64,500	64,410
<b>Total Consumption</b> (1000 MT)	108,250	108,040	108,000	110,578	108,500	109,410
<b>Ending Stocks</b> (1000 MT)	13,310	13,550	16,519	14,000	12,319	14,030
<b>Total Distribution</b> (1000 MT)	153,487	153,517	159,598	159,663	158,319	157,440
<b>Yield</b> (MT/HA)	5.687	5.6915	5.5032	5.5035	5.545	5.5189

(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 Wheat begins in July for all countries. TY 2023/2024 = July 2023 - June 2024

Source: FAS EU Posts.

EU wheat crop in MY 2023/24 has been revised down, and it is projected now to reach 134.4 MMT, still up from MY 2022/23 levels. After a dry spring in Western Europe, an excess of rains throughout the harvest season led wheat final production to fall below July forecasts in the major wheat producing Member States such as France, Germany, and Poland. Likewise, in Spain the significant drought resulted in lower than previously anticipated yields. On the other hand, after a disastrous crop in MY 2022/23 due to the drought, Hungary's wheat crop went back to above average yield and volume. The quality of the wheat crop is reportedly generally good in most European wheat producing countries. However, late rainfall throughout the harvest lowered the quality of some wheat in Germany and Poland. Protein content of French wheat is higher than in MY 2022/23 but still lower than the five-year average, which could be due to lower nitrogen fertilization because of higher fertilizer prices. EU wheat area in MY 2023/24 has been slightly adjusted downwards compared to previous estimates due to lower than anticipated plantings notably in France, Germany, Poland, and Spain, and not offset by higher area in Hungary.

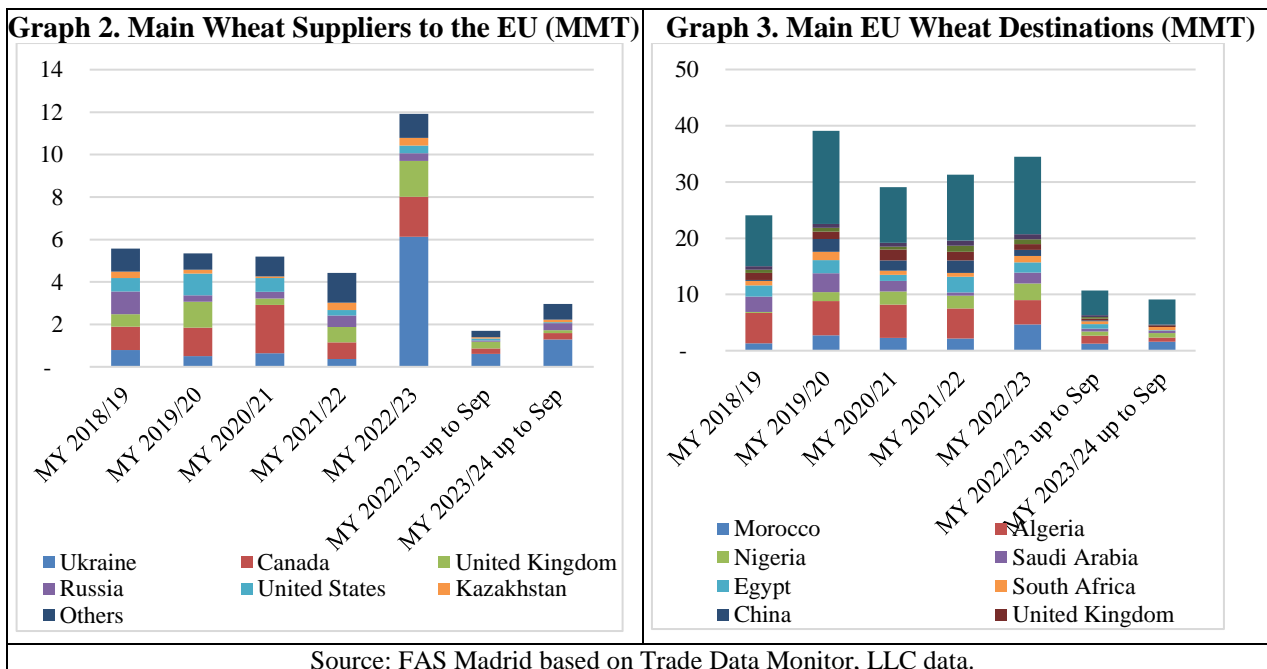
EU wheat feed uses are expected to slightly decrease in MY 2023/24 given the increased competitiveness of corn and barley in the feed formula. Despite lower wheat prices, farmers in most EU Member States are continuing to lower their feed purchases to reduce their operating costs, in addition to decapitalizing their cattle and pork herd in the context of an inflation-driven sluggish consumption of meat and dairy products. Animal diseases are also negatively affecting animal inventories.

EU FSI wheat uses are expected to slightly increase in MY 2023/24. This hides a small decline both in the milling sector and the starch sector, where high energy prices are negatively impacting the industries' margins and consumption is driven down by inflation. On the other hand, biofuel uses of wheat are expected to increase marginally, due to the higher competitiveness of wheat compared to other feedstocks.

The smaller Spanish wheat crop should continue to sustain EU wheat imports in MY 2023/24, albeit at a lower level than in MY 2022/23 due to the large EU corn supply. Ukraine is anticipated to remain a major supplier of wheat to the EU, despite the suspension of the United Nation's Black Sea Grain Initiative agreement, which is only partly replaced by shipping alongside Romanian and Bulgarian coasts and imports from Ukraine by road or train to neighboring countries.

EU wheat exports in MY 2023/24 are anticipated to remain strong, but still lower than in MY 2022/23 as EU origin wheat faces strong competition from Ukraine and Russia, in this case supported by the depreciation of the Russian Ruble during the third quarter of 2023. This is particularly true for North African markets, where French wheat exports are seeing its competitiveness eroded. China is expected to buy a significant amount of French wheat. Romania is also foreseen to export more of its price competitive wheat to North Africa and Egypt, as well as to Indonesia following an agreement on a joint sanitary certification program in November 2023. Poland is also expected to increase its MY 2023/24 exports supported by the weakness of the Polish Zloty.

Wheat ending stocks in MY 2023/24 are expected to decrease compared to Post previous estimate and reach slightly lower levels than in MY 2022/23.



## Section II. Coarse Grains<sup>4</sup>

### Corn

**Table 3. Production, Supply and Distribution - Corn**

Corn	2021/2022		2022/2023		2023/2024	
	Oct 2021		Oct 2022		Oct 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
<b>Area Harvested</b> (1000 HA)	9,227	9,247	8,820	8,837	8,265	8,300
<b>Beginning Stocks</b> (1000 MT)	7,828	7,828	11,390	11,364	7,182	7,191
<b>Production</b> (1000 MT)	71,549	71,500	52,292	52,900	59,800	60,200
<b>MY Imports</b> (1000 MT)	19,738	19,736	23,500	23,150	24,500	22,200
<b>TY Imports</b> (1000 MT)	19,738	19,736	23,500	23,150	24,500	22,200
<b>TY Imp. from U.S.</b> (1000 MT)	747	750	174	185	-	-
<b>Total Supply</b> (1000 MT)	99,115	99,064	87,182	87,414	91,482	89,591
<b>MY Exports</b> (1000 MT)	6,025	6,025	4,000	4,208	4,100	3,500
<b>TY Exports</b> (1000 MT)	6,025	6,025	4,000	4,208	4,100	3,500
<b>Feed and Residual</b> (1000 MT)	60,000	60,000	55,500	55,800	59,100	58,000
<b>FSI Consumption</b> (1000 MT)	21,700	21,675	20,500	20,215	20,900	20,855
<b>Total Consumption</b> (1000 MT)	81,700	81,675	76,000	76,015	80,000	78,855
<b>Ending Stocks</b> (1000 MT)	11,390	11,364	7,182	7,191	7,382	7,236
<b>Total Distribution</b> (1000 MT)	99,115	99,064	87,182	87,414	91,482	89,591
<b>Yield</b> (MT/HA)	7.7543	7.7322	5.9288	5.9862	7.2353	7.2530

(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 2023/2024 = October 2023 - September 2024

Source: FAS EU Posts.

MY 2023/24 EU corn production estimate is pegged at 60.2 MMT, marginally above the summer estimate, and well-above the previous season output. Production rebounded in most EU Member States mainly due to improved yields. However, as harvesting has not been concluded in some parts of Europe, production estimates could be further revised.

In general, growing conditions have been favorable in northern, western, and central Europe and less advantageous in the southern part. After the historical drought trimmed the crop last year, Hungary's corn production more than doubled this year with yields returning to normal. The cooler than usual weather and the decline in fertilizer use limited the increase in production. The hot and dry summer weather in Bulgaria had a severely negative impact on the corn crop, well below the summer estimate. Similar weather conditions prevailed in Romania, where in absence of rain, the soil moisture level deficit worsened. In conjunction with above-average temperatures during the critical phases of development, the drought hindered plant development, particularly in the eastern half of the country, limiting the production increase compared to the previous season.

<sup>4</sup>Coarse grains are the threshed, dry seeds of plant, cultivated for human and/or animal consumption and gathered in the dried, unprocessed state upon maturity. Coarse grains include corn, barley, rye, oats, mixed grains, and sorghum.



Conversely, despite a significantly lower area, the French crop benefited from abundant rainfall during the summer which supported above average yields and registered year-on-year recovery. A similar situation occurred in Germany, where the area expansion, in tandem with improved yields due to good rainfall over the summer, led to a production recovery compared to the previous season. Though slightly reduced from the earlier estimate, Italy also expects an improved corn output. EU Member States expecting cuts in production are Spain, due to the lower area planted, Poland, and the Czech Republic, because of smaller area and yields, though not as dramatic as initially projected. MY 2022/23 production estimate was revised up based on larger harvests in Romania, France, and Greece.

Due to its improved availability and price competitiveness against other grains, corn consumption is anticipated to increase in MY 2023/24 from the previous season, driven both by increased feed and industrial use. Feed use of corn is anticipated to grow in France, Spain, Hungary, Romania, Portugal, Poland, Croatia, and Ireland. The overall expected increase cancelled the potential reductions in feed from the Netherlands, Italy, Bulgaria, and Belgium. In the Netherlands, corn is currently the preferred grain for animal feed, but its feed incorporation is likely to decline because of the falling animal numbers. MY 2023/24 industrial utilization is anticipated to improve in Hungary, Poland, Spain, Italy, and Austria, reflecting improved competitiveness. That will offset the lower industrial demand coming from Belgium. Food use is predicted to increase slightly in Hungary under the prospects of demand recovery.

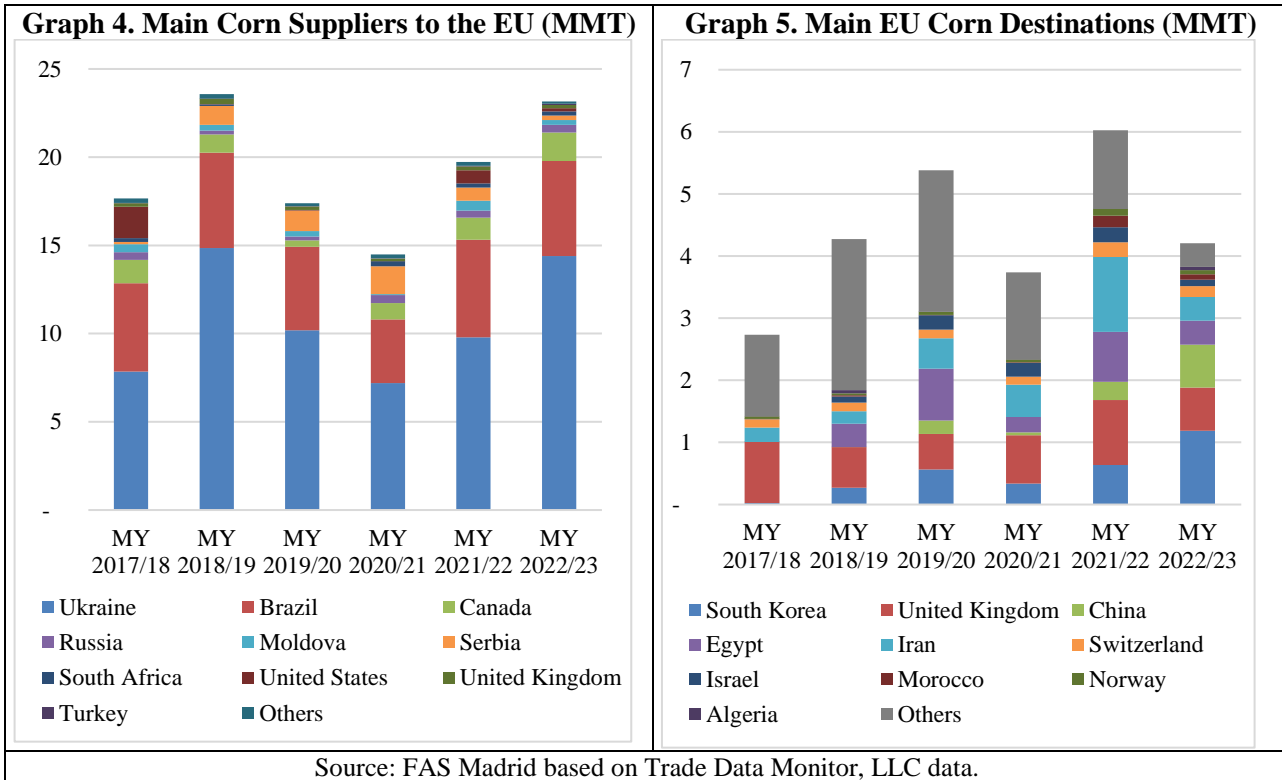
MY 2022/23 total consumption was revised down for all types of utilizations, because of the lower supply, higher competitiveness of alternative grains, declining livestock numbers, and deteriorating consumer purchasing power.

Imports in MY 2023/24 are foreseen nearly 1 MMT down from the previous season, but still above the five-year average. A lower import figure reflects an improved crop, but also the continuation of the trade regime adopted by Ukraine's border countries, namely Hungary, Poland, Slovakia, and Romania. Though anticipated to supply a lower quantity than the previous season because of falling stocks, Ukraine will remain the leading supplier due to its competitiveness and despite risks associated with the transit routes. The Danube River and the temporary corridor from the Odesa region through the Black Sea are currently the most cost-effective routes, followed by rail and road through western crossing border points. With its abundant supply, Brazil is predicted to increase its presence on the EU market, mostly intended to cover Spain's feed grains demand. Serbia, where the corn crop rebounded in MY 2023/24, is anticipated to regain its place on the EU market. Canada, South Africa, and Moldova will continue to cover part of the EU corn demand. Per the latest customs data, MY 2022/23 imports reached near record levels due to the EU's 15-year low crop, though lower than predicted earlier. That may be attributed to a slower pace of imports from Ukraine and Brazil in the last quarter of the MY 2022/23, compared to the previous season.

MY 2023/24 exports are anticipated to fall to 3.5 MMT as the lower exportable supply in the major EU corn exporters, such as Romania, and Bulgaria, was not compensated by the larger French exports. South Korea, China, and United Kingdom are anticipated to remain the top export markets. Per the latest

trade data, MY 2022/23 exports were above the summer estimate, due to demand from South Korea, China, Egypt, and Switzerland in the last quarter.

Higher corn consumption due to dropping prices combined with a lower level of imports and despite the improved crop will keep the ending stock tight in MY 2023/24, though slightly improved from the previous season.



## Barley

**Table 4. Production, Supply and Distribution - Barley**

Barley Market Year Begins	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
<b>Area Harvested</b> (1000 HA)	10,273	10,248	10,297	10,281	10,320	10,303
<b>Beginning Stocks</b> (1000 MT)	5,011	5,011	5,230	5,210	5,576	5,700
<b>Production</b> (1000 MT)	52,009	51,938	51,692	51,780	48,350	47,350
<b>MY Imports</b> (1000 MT)	991	993	2,022	1,985	1,800	2,100
<b>TY Imports</b> (1000 MT)	1,239	1,247	2,200	2,100	1,600	1,600
<b>TY Imp. from U.S.</b> (1000 MT)	-	-	-	-	-	-
<b>Total Supply</b> (1000 MT)	58,011	57,942	58,944	58,975	55,726	55,150
<b>MY Exports</b> (1000 MT)	7,331	7,332	6,668	6,675	6,200	6,150
<b>TY Exports</b> (1000 MT)	6,362	6,360	6,500	6,500	6,500	6,500
<b>Feed and Residual</b> (1000 MT)	32,800	32,800	33,800	33,600	31,200	30,900
<b>FSI Consumption</b> (1000 MT)	12,650	12,600	12,900	13,000	13,100	13,050
<b>Total Consumption</b> (1000 MT)	45,450	45,400	46,700	46,600	44,300	43,950
<b>Ending Stocks</b> (1000 MT)	5,230	5,210	5,576	5,700	5,226	5,050
<b>Total Distribution</b> (1000 MT)	58,011	57,942	58,944	58,975	55,726	55,150
<b>Yield</b> (MT/HA)	5.0627	5.0681	5.0201	5.0365	4.6851	4.5957

(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 Barley begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Source: FAS EU Posts.

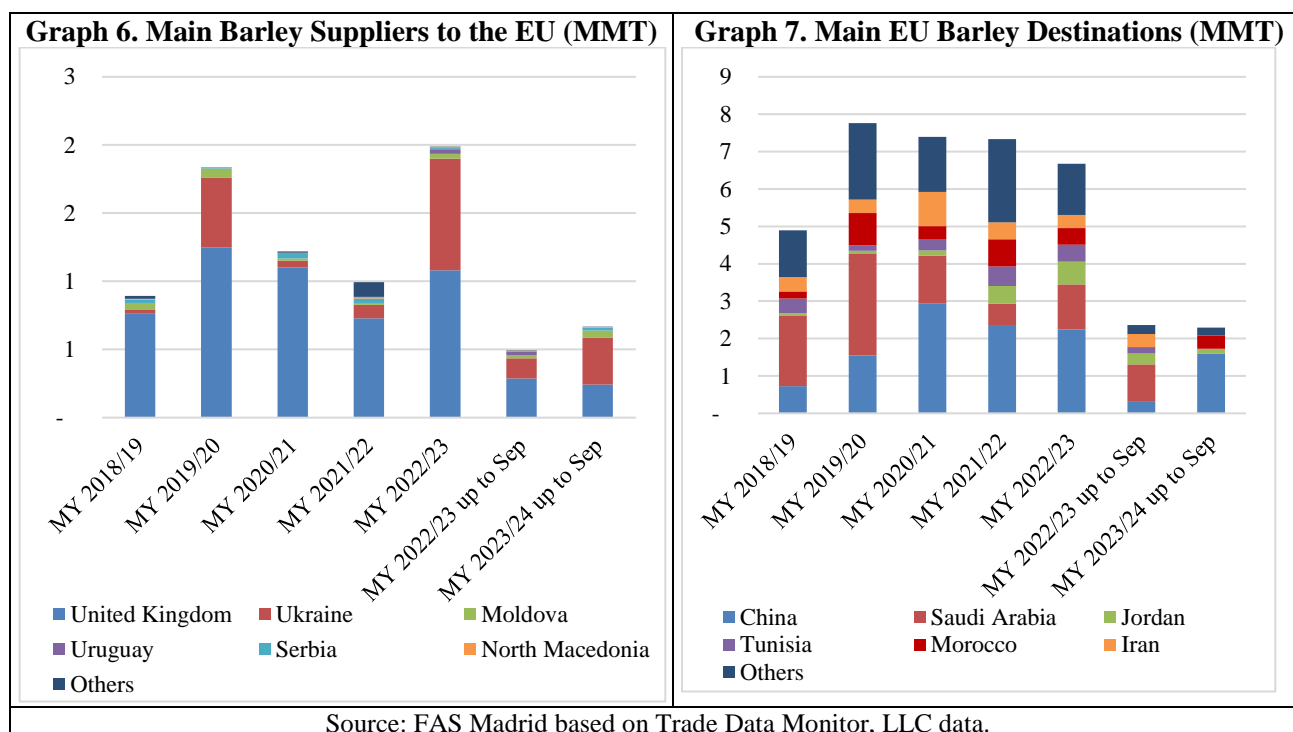
EU barley production in MY 2023/24 has been revised down to 47.3 MMT as severe drought – particularly in Spain – pushed yields even lower than the dire outlook in early summer. Adverse and erratic weather conditions also took a toll on yields in the Nordic countries and the Baltic states. Compared to the previous season, barley production significantly went down in Spain, Denmark, Sweden, Finland, and Ireland and declined to a lower extent in Germany, Poland, the Baltics, the Czech Republic, and Croatia. The rebound in harvest in France, Hungary, Romania, and Bulgaria was not enough to counter the losses. EU barley production in MY 2023/24 is the lowest recorded since MY 2011/12.

Feed barley consumption in MY 2023/24 in the EU is projected down, given the sharp drop in domestic supply registered in Spain, Ireland, and the Scandinavian countries. Additionally, since the beginning of the corn harvest in the northern hemisphere, competitiveness of feed barley eroded in most European markets. The contraction in the EU’s livestock sector demand, driven mainly by the reduction in swine inventories, negatively affects the utilization of feed barley. On a positive note, new processing capacity use for high-quality barley protein production in Hungary helps maintain the level of FSI uses despite the tight supply of spring barley in the brewing industry.

The exceptionally low EU production is expected to maintain a higher demand for barley imports, particularly from the Ukraine and the United Kingdom. Therefore, imports are revised up to 2.1 MMT in MY 2023/24.

Conversely, EU barley exports are projected down to 6.1 MMT because of reduced domestic availability. In addition, Russian barley has put downward pressure on global export prices and gained a price advantage on North African and Asian markets. Germany's exports destined for Saudi Arabia and North Africa are anticipated to drop in MY 2023/24. France's position in the Chinese market is solid, but the more competitive Russian and Ukrainian products and Australia's recent resolution of its trade dispute with China will cast a shadow on exports sales. At the same time, Romania's export potential improved over the past years stemming from the strategic role of Constanta in the transit of Ukrainian crops, and a rebound in production is also expected to give a moderate boost to Romanian exports in MY 2023/24. Regarding price hierarchy, Bulgaria and Lithuania also have the potential to gain room in the Middle East and North African markets.

Even though demand for feed barley is forecast significantly down, the unusually low supply impacts the level of ending stocks. Therefore, about five million MT are expected as carryout in MY 2023/24.



## Rye

Table 5. Production, Supply and Distribution - Rye

Rye Market Year Begins	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	1,928	1,928	1,777	1,770	1,850	1,850
Beginning Stocks (1000 MT)	742	742	902	901	701	671
Production (1000 MT)	8,011	8,010	7,631	7,600	7,580	7,600
MY Imports (1000 MT)	258	258	109	110	150	80
TY Imports (1000 MT)	219	220	125	150	150	150
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	9,011	9,010	8,642	8,611	8,431	8,351
MY Exports (1000 MT)	159	159	141	140	175	140
TY Exports (1000 MT)	210	210	125	150	175	170
Feed and Residual (1000 MT)	4,700	4,700	4,600	4,600	4,500	4,300
FSI Consumption (1000 MT)	3,250	3,250	3,200	3,200	3,150	3,110
Total Consumption (1000 MT)	7,950	7,950	7,800	7,800	7,650	7,410
Ending Stocks (1000 MT)	902	901	701	671	606	801
Total Distribution (1000 MT)	9,011	9,010	8,642	8,611	8,431	8,351
Yield (MT/HA)	4.1551	4.1546	4.2943	4.2938	4.0973	4.1081

(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 Rye begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Source: FAS EU Posts.

## Oats

Table 6. Production, Supply and Distribution - Oats

Oats Market Year Begins	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	2,544	2,544	2,337	2,320	2,310	2,270
Beginning Stocks (1000 MT)	471	471	395	420	498	595
Production (1000 MT)	7,471	7,467	7,409	7,500	6,810	5,800
MY Imports (1000 MT)	155	155	171	171	125	200
TY Imports (1000 MT)	209	209	150	160	125	125
TY Imp. from U.S. (1000 MT)	4	4	-	-	-	-
Total Supply (1000 MT)	8,097	8,093	7,975	8,091	7,433	6,595
MY Exports (1000 MT)	227	227	77	78	100	70
TY Exports (1000 MT)	202	202	80	80	100	100
Feed and Residual (1000 MT)	6,050	6,020	5,950	6,000	5,700	5,000
FSI Consumption (1000 MT)	1,425	1,426	1,450	1,418	1,425	1,362
Total Consumption (1000 MT)	7,475	7,446	7,400	7,418	7,125	6,362
Ending Stocks (1000 MT)	395	420	498	595	208	163
Total Distribution (1000 MT)	8,097	8,093	7,975	8,091	7,433	6,595
Yield (MT/HA)	2.9367	2.9351	3.1703	3.2328	2.9481	2.5551

(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 Oats begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Source: FAS EU Posts.

In MY 2023/24, a combination of lower area and poor yields have reduced EU production of oats to 5.9 MMT. All major EU oat producing Member States, namely Poland, Finland, Spain, Sweden, and Denmark, registered production declines. In Poland, low temperatures in spring and the related delays in starting sowing pushed yields down. In the Nordic countries (Finland, Sweden, and Denmark) oat production declined significantly due to heavy rainfall during harvest. Moreover, the sunny and dry early summer also had a negative impact in grain production in the Nordics. In Spain, the dry conditions through the crop cycle slashed grain yields. In Germany, the decline in production in 2023 is the result planting delays due to wet soils and inaccessible fields, cold temperatures in spring, and lack of rains in early summer.

### Mixed Grains<sup>5</sup>

**Table 7. Production, Supply and Distribution – Mixed Grains**

Mixed Grain	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
<b>Area Harvested</b> (1000 HA)	3,578	3,556	3,177	3,166	3,050	3,050
<b>Beginning Stocks</b> (1000 MT)	436	436	687	687	698	910
<b>Production</b> (1000 MT)	15,001	15,000	13,361	13,363	12,900	12,800
<b>MY Imports</b> (1000 MT)	-	-	-	-	-	-
<b>TY Imports</b> (1000 MT)	-	-	-	-	-	-
<b>TY Imp. from U.S.</b> (1000 MT)	-	-	-	-	-	-
<b>Total Supply</b> (1000 MT)	15,437	15,436	14,048	14,050	13,598	13,710
<b>MY Exports</b> (1000 MT)	-	-	-	-	-	-
<b>TY Exports</b> (1000 MT)	-	-	-	-	-	-
<b>Feed and Residual</b> (1000 MT)	13,000	13,000	11,700	11,500	11,365	11,100
<b>FSI Consumption</b> (1000 MT)	1,750	1,749	1,650	1,640	1,650	1,640
<b>Total Consumption</b> (1000 MT)	14,750	14,749	13,350	13,140	13,015	12,740
<b>Ending Stocks</b> (1000 MT)	687	687	698	910	583	970
<b>Total Distribution</b> (1000 MT)	15,437	15,436	14,048	14,050	13,598	13,710
<b>Yield</b> (MT/HA)	4.1926	4.2182	4.2055	4.2208	4.2295	4.1967

(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 Mixed Grain begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Source: FAS EU Posts.

<sup>5</sup>Figures for EU mixed grain include triticale, and the threshed, dry seeds of wheat, barley, corn, oats, rye, and sorghum grown and harvested on the same field.

## Sorghum

**Table 8. Production, Supply and Distribution – Sorghum**

Sorghum Market Year Begins	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
<b>Area Harvested</b> (1000 HA)	147	151	129	132	133	159
<b>Beginning Stocks</b> (1000 MT)	21	21	17	15	14	13
<b>Production</b> (1000 MT)	799	812	553	534	690	810
<b>MY Imports</b> (1000 MT)	161	161	42	42	100	22
<b>TY Imports</b> (1000 MT)	168	168	40	38	100	22
<b>TY Imp. from U.S.</b> (1000 MT)	120	120	0	2	-	-
<b>Total Supply</b> (1000 MT)	981	994	612	591	804	845
<b>MY Exports</b> (1000 MT)	16	16	15	15	15	10
<b>TY Exports</b> (1000 MT)	19	18	15	14	10	10
<b>Feed and Residual</b> (1000 MT)	925	940	560	540	750	797
<b>FSI Consumption</b> (1000 MT)	23	23	23	23	23	23
<b>Total Consumption</b> (1000 MT)	948	963	583	563	773	820
<b>Ending Stocks</b> (1000 MT)	17	15	14	13	16	15
<b>Total Distribution</b> (1000 MT)	981	994	612	591	804	845
<b>Yield</b> (MT/HA)	5.4354	5.3775	4.2868	4.0455	5.188	5.0943

(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 Sorghum begins in October for all countries. TY 2023/2024 = October 2023 - September 2024

Source: FAS EU Posts.

## Section III. Rice

**Table 9. Production, Supply and Distribution – Rice**

Rice, Milled Market Year Begins	2021/2022		2022/2023		2023/2024	
	Sep 2021		Sep 2022		Sep 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
<b>Area Harvested</b> (1000 HA)	401	401	330	327	340	350
<b>Beginning Stocks</b> (1000 MT)	682	682	909	910	809	810
<b>Milled Production</b> (1000 MT)	1,732	1,732	1,336	1,344	1,428	1,407
<b>Rough Production</b> (1000 MT)	2,661	2,677	2,086	2,137	2,230	2,185
<b>Milling Rate (.9999)</b> (1000 MT)	6,510	6,470	6,404	6,289	6,404	6,439
<b>MY Imports</b> (1000 MT)	2,408	2,407	2,303	2,305	2,400	2,300
<b>TY Imports</b> (1000 MT)	2,492	2,490	2,400	2,400	2,400	2,300
<b>TY Imp. from U.S.</b> (1000 MT)	18	23	-	-	-	-
<b>Total Supply</b> (1000 MT)	4,822	4,821	4,548	4,559	4,637	4,517
<b>MY Exports</b> (1000 MT)	413	414	389	401	400	390
<b>TY Exports</b> (1000 MT)	402	404	400	401	400	390
<b>Consumption and Residual</b> (1000 MT)	3,500	3,497	3,350	3,348	3,400	3,340
<b>Ending Stocks</b> (1000 MT)	909	910	809	810	837	787
<b>Total Distribution</b> (1000 MT)	4,822	4,821	4,548	4,559	4,637	4,517
<b>Yield (Rough)</b> (MT/HA)	6.6359	6.6758	6.3212	6.5352	6.5588	6.2429

(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 Rice, Milled begins in January for all countries. TY 2023/2024 = January 2024 - December 2024

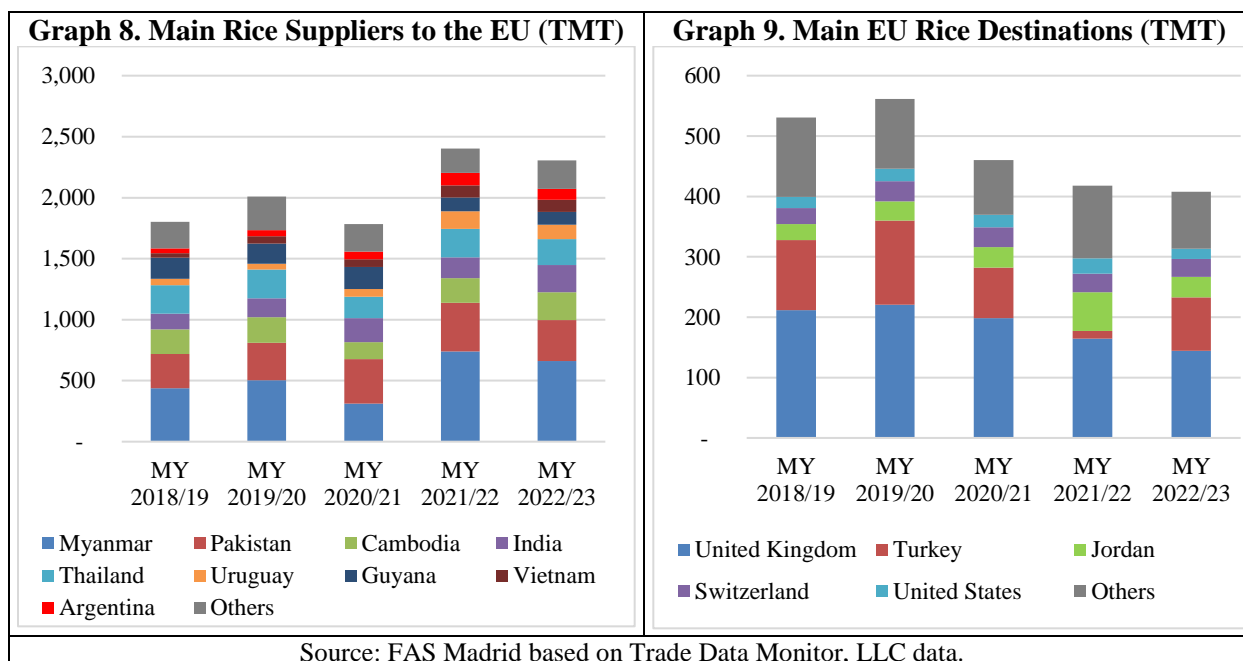
Source: FAS EU Posts.

EU rice production<sup>6</sup> is forecast to reach 1.4 MMT in MY 2023/24, up from the 1.3 MMT registered in MY 2022/23, but still well below output levels in MY 2021/22. The recovery in MY 2023/24 is driven by higher volumes forecast in Italy, Greece, Portugal, France, and Romania. MY 2023/24 rice production is forecast to decrease in Spain and Bulgaria and remain stable in Hungary. In MY 2023/24, EU rice area is projected at 350 thousand Ha, mainly driven by increases in Italy. Spain's MY 2023/24 rice planted area is projected to decline only marginally compared to MY 2022/23, as the recovery in plantings in Extremadura offset the extreme drought-driven low-plantings registered in Andalucía.

EU rice consumption is forecast to remain steady in MY 2023/24, after declining in MY 2022/23 in response to soaring prices.

MY 2023/24 EU rice imports are projected to remain flat compared to MY 2022/23. The EU continues to consolidate its net importing position as domestic Indica rice production falls short of meeting the bloc's needs. Other than main EU rice producing Member States, the Netherlands is a key gateway for rice imports to other EU Member States, as is Belgium, given its large milling capacity and its non-existent domestic production. Other large EU rice importing Member States include France and Germany, given their relatively high consumption compared to their virtually non-existent domestic rice production.

MY 2023/24 EU rice exports are projected at 390 thousand MT, marginally down from MY 2022/23 levels. Most of the EU rice exports consist of Japonica varieties to the United Kingdom and Turkey.



<sup>6</sup>EU rice production is concentrated in seven Member States: Italy, Spain, Greece, Portugal, Bulgaria, France, and Romania.



## Section IV. Policy<sup>7</sup>

### Member State Grains Import Policy

**Romania:** Based on the agreement with Ukraine, four commodities (wheat, corn, rapeseeds, sunflower seeds) were denied entry into Romania for 30 days starting on September 15. During this time, the Romanian government approved legislation for implementing an import licensing system. In mid-October, the Romanian government approved an emergency ordinance setting up the import requirements and the authorization procedure. The ordinance is perceived to be equivalent to a “*de-facto*” ban. The ordinance provisions will expire on December 31, 2023.

**Bulgaria:** Bulgarian authorities signed a memorandum with the interested parties to extend the import ban until November 30. In the meantime, Bulgaria negotiated with Ukraine to observe its newly introduced licensing and export quotas regime. The country should be ready with its estimates for allowed imports from Ukraine by the last week of November. In absence of any new regulation, currently there is no sufficient clarity or public information about how the new import regime will function. However, the country should be ready to allow imports from Ukraine by the end of November.

**Slovakia:** After the European Commission lifted the ban on Ukrainian agricultural commodities on September 15, the government of Slovakia decided to extend the ban unilaterally. In response to Ukraine’s World Trade Organization complaint,<sup>8</sup> the Ukrainian and Slovak Ministers of Agriculture agreed to create a grain trade licensing system that would allow for lifting the ban on imports of the four commodities to Slovakia (wheat, corn, rapeseed, and sunflower seeds).

**Hungary:** In defiance of the European Commission Decision, Hungary maintained the import ban on grains and oilseed imports from Ukraine and expanded the restrictions including further products of 25 tariff lines on September 16, 2023.

**Poland:** After the European Commission lifted the ban on the import of four agricultural products to the EU on September 15, 2023, the government in Poland, in accordance with previous announcements, unilaterally maintained the ban for an indefinite period. Wheat flour, its milling products, and rapeseed meal have been added to the banned products. The Polish government's position has not been changed by the complaint against Poland lodged by the Ukrainian government with the World Trade Organization (WTO).

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<sup>7</sup> For additional information on EU Policy affecting grains, please consult the [Grain and Feed Annual 2023](#) EU GAIN Report.

<sup>8</sup> On September 18, 2023, Kyiv filed a complaint with the WTO against the three EU countries (Hungary, Slovakia, and Poland) over their refusal to lift the import ban on Ukrainian products despite the EU’s decision to end the four-month embargo.

## EU Steel and Aluminum Duties Targeting U.S. Grains

On June 22, 2018, the EU imposed additional tariffs of 25 percent on U.S. corn, semi-milled and milled rice, and products in retaliation against U.S. safeguard measures on EU steel and aluminum ([Commission Implementing Regulation \(EU\) 2018/886](#)). On October 30, 2021, the United States and European Union agreed to end the dispute over U.S. steel and aluminum tariffs. On November 26, 2021, under [Commission Implementing Regulation \(EU\) 2021/2083](#), the EU suspended tariffs affecting U.S. agricultural products from January 1, 2022, until December 31, 2023.

## EU Rice Policy

From September 7, 2023, under [Commission Implementing Regulation 2023/1701](#) the import duty for husked rice under HS Code 100620, other than husked basmati rice of the varieties referred to in Article 1 of [Commission Regulation 972/2006](#), shall be 42.50 Euros/MT.

### Abbreviations used in this report

<b>ASF</b>	African Swine Fever
<b>Benelux</b>	Belgium, the Netherlands, and Luxemburg
<b>CY</b>	Calendar Year
<b>e</b>	Estimate (of a value/number for the current, not yet completed, marketing year)
<b>EU</b>	European Union (Current EU-27, without the UK).
<b>EHD</b>	Epizootic Hemorrhagic Disease
<b>f</b>	Forecast (of a value/number for the next, not yet started, marketing year)
<b>FAS</b>	Foreign Agricultural Service
<b>Coarse Grains</b>	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.
<b>Ha</b>	Hectares
<b>HPAI</b>	Highly Pathogenic Avian Influenza
<b>HRI</b>	Hotels, Restaurants, and Institutions
<b>IPAD</b>	International Production Assessment Division
<b>FSI</b>	Food, Seed, and Industrial
<b>MMT</b>	Million Metric Tons
<b>MRL</b>	Maximum Residue Limits
<b>MS</b>	EU Member State(s)
<b>MT</b>	Metric Ton (1000 kg)
<b>MY</b>	Marketing Year. July to June for all grains, except for corn which follows an October to September, and rice which follows a September to August calendar
<b>PRRS</b>	Porcine Reproductive and Respiratory Syndrome
<b>TMT</b>	Thousand Metric Tons
<b>TY</b>	Trade Year. July to June for wheat, October to September for coarse grains, and January to December for rice
<b>UK</b>	United Kingdom
<b>U.S.</b>	United States
<b>WTO</b>	World Trade Organization

## Related Reports

<b>Title</b>	<b>Date</b>
<a href="#">Grain and feed Market Update Bulgaria - 2023</a>	11/21/2023
<a href="#">EU Grain Summer Update 2023</a>	07/20/2023
<a href="#">Grain and feed Market Update Bulgaria - 2023</a>	07/11/2023
<a href="#">Spanish Grain Supply Chain Shows Resilience in Challenging Times</a>	06/24/2022
<a href="#">Grain Supply Chain Actors Agree on Drastic Crop Decline in Spain</a>	06/07/2023
<a href="#">Grain Production Decline to Test Supply Chain Logistics Resilience in Spain</a>	06/01/2023
<a href="#">EU Grain and Feed Annual 2023</a>	04/15/2023

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## Attachments:

No Attachments