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Report Highlights:

EU grain production in MY 2025/26 is expected to exceed last season's levels due to larger winter grain area and improved yields. The larger domestic grain availability combined with the reinstitution of the Ukraine tariff rate quota system is expected to reduce imports and increase internal movement of grains to supply the steady internal consumption levels. The EU is expected to face increased competition in its traditional grain export markets as Ukraine redirects trade flows from the EU to third country destinations.

Disclaimer: This report presents an updated outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2025/26. 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

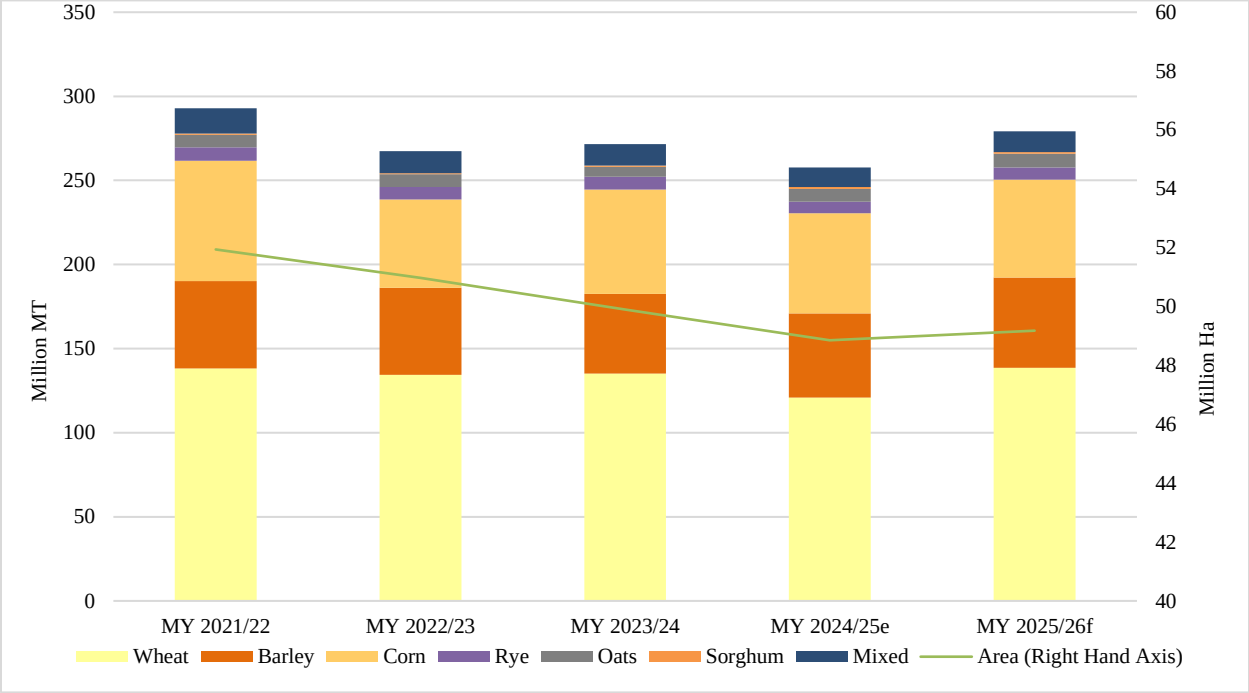
Total Grains[1]	2023/2024		2024/2025		2025/2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	50,337	50,218	49,032	48,864	50,010	49,205
Beginning Stocks (1000 MT)	32,799	32,799	31,247	30,924	26,630	27,977
Production (1000 MT)	272,414	271,603	259,299	257,658	278,375	279,235
MY Imports (1000 MT)	34,768	34,737	32,095	31,911	28,230	28,980
TY Imports (1000 MT)	34,396	34,397	32,010	31,745	28,230	28,995
TY Imp. from U.S. (1000 MT)	1,677	1,341				
Total Supply (1000 MT)	339,981	339,139	322,641	320,493	333,235	336,192
MY Exports (1000 MT)	49,529	49,528	35,020	37,369	42,590	44,815
TY Exports (1000 MT)	49,437	49,438	35,255	37,685	42,590	44,815
Feed and Residual (1000 MT)	156,705	156,971	158,350	153,520	160,500	159,865
FSI Consumption (1000 MT)	102,500	101,716	102,641	101,627	103,391	102,038
Total Consumption (1000 MT)	259,205	258,687	260,991	255,147	263,891	261,903
Ending Stocks (1000 MT)	31,247	30,924	26,630	27,977	26,754	29,474

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

Total Distribution (1000 MT)	339,981	339,139	322,641	320,493	333,235	336,192

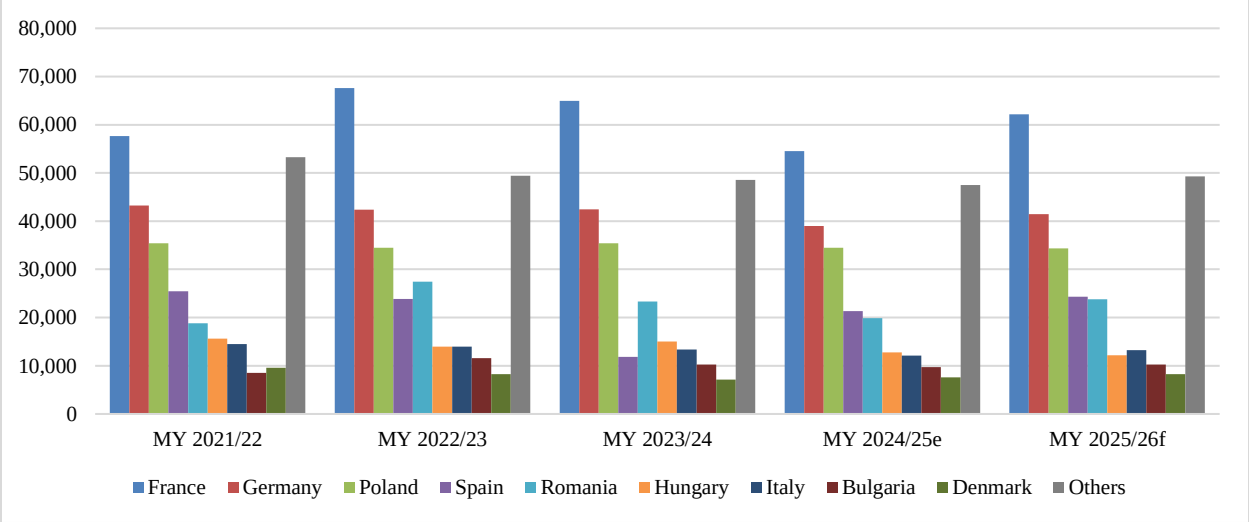
Source: FAS EU Posts.

Figure 1. EU Grain Area and Production



Source: FAS EU Posts.

Figure 2. Grain Production by EU Member States (MMT)



Source: FAS EU Posts.

Area planted to grains in the EU in MY 2025/26 is expected to amount to 49.2 million Hectares (Ha), up from the 48.9 million Ha planted in MY 2024/25, ending the downward trend in grain-planted area initiated back in MY 2021/22, as farmers try to maximize winter grains area since the weather risks are lower compared to spring crops.

European Union (EU) total grain production in MY 2025/26 is expected to exceed MY 2024/25 levels and amount to 279.2 million metric tons (MMT). This production increase stems from the larger area planted and improved yields across the EU, most notably in France, Romania, and Germany, where adverse weather conditions slashed yields in the previous season. In the case of Spain, the production increase is driven by the close to ideal weather conditions registered in MY 2025/26, boosting yields to close to historic record levels. While the final impact of heat in summer grains is yet to be assessed, both Italy and Bulgaria are expecting substantially improved production in MY 2025/26. Hungary, where unfavorable conditions ranging from extreme heat during grain filling to excessive dryness, constitutes the exception to the rule among the EU largest grain producing Member States. In Poland, after an exceptionally cold and dry spring, there was a significant improvement in the weather, with rainfall and temperatures favorable for plant growth, which increased forecasts and currently the total grain harvest is estimated at a level similar to the previous year.

Grain Crops Development in Main EU Producing Member States

In Spain, abundant precipitations and mild temperatures prevailing since the beginning of March favored winter grain crop development and increased yields expectations. Similarly, the ample water supplies have allowed for a recovery of the country's corn and rice area. Only the high temperatures since the second half of May curbed yields expectations in some regions, negating an otherwise record grain crop.

After almost two years of very wet weather, fully replenishing underground water reservoirs, **France** has been experiencing a dry period since the spring of 2025. The dryness came too late to negatively impact winter crops such as wheat, and winter barley. However, it advanced the wheat and barley harvest by about two or three weeks. These weather conditions are likely to stress spring-planted crops such as spring barley and corn, whose final yields will be determined by August rainfall and temperature patterns. Very hot temperatures in the southwest of France in the first half of July may have impacted corn flower fertility, with temperatures above 35 Celsius degrees.

In Northern **Italy,** wet conditions persisted until mid-May, creating favorable conditions for the spread of pests and diseases. A heatwave in June and early July then brought heat stress, lowering yield expectations for winter crops. In contrast, winter grains in Central Italy are in very good condition, with high yields anticipated, except in the central-western regions, where a prolonged dry spell in June negatively affected yield potential. In the South, the winter crop season concluded with highly favorable expectations, particularly in Sicily's major durum wheat-producing areas. Summer grains across the region are also developing well, supported by adequate water availability. Although a wet spring caused some initial delays in plantings, above-average temperatures in early July have helped to partially compensate.

In **Germany**, early spring conditions were too dry in most regions, with less than 50 percent of the normal precipitation registered. According to the German meteorological office, the period between February through April was the dryest in Germany since 1931. Cool nights with dew formation brought

some relief from the otherwise drought conditions. Rain in May and June helped to improve the production outlook but was not sufficient, especially in the eastern part of the country. The hot spell with temperatures of 36-39 Celsius degrees in the first week of July sped up maturity, especially on less fertile soils, and may have a negative effect on yields and lead to an early start of winter grains harvest. On the positive side, the dry conditions reduced the incidence of fungal diseases and the quality of winter grains is expected to be excellent.

In **Finland**, **Sweden**, and **Denmark**, grain production is expected to rebound due to a combination of larger area and better yields compared to the previous season.

The beginning of spring 2025 in **Poland** created unfavorable conditions for the development of winter grains. In April, minus 8 Celsius-degree frosts accompanied by a strong shortage of rainfall inhibited the development of winter grains and jeopardized spring plantings, particularly in the case of corn given its higher temperature requirements for germination compared to other spring-planted grains. The long-awaited rains arrived at the end of May, improving soil moisture and making up for the initially anticipated productivity losses. All in all, the overall picture for the upcoming grain harvest in Poland is now much more promising than at the beginning of the cold spring.

Similarly, in **Lithuania**, a long cold spring with heavy frosts delayed plant vegetation. However, sunny days and high temperatures since the second half of June have resulted in improved yield expectations for grain. Conversely, in **Latvia**, a mild start to spring gave a strong boost to the growth of winter grains and earlier than usual planting of spring crops. Harvest forecasts were very promising until April. However, sudden frosts in early and mid-May and then two weeks of torrential rain and floods registered between late May and early June that washed away fertilizers from the field and impeded field treatments, significantly reduced yield potential. In **Estonia**, spring conditions for grain crops were favorable resulting in good soil moisture after May and June precipitations, although early spring cold-spells had already taken a toll in yields.

In **Romania**, spring started with above average temperatures and precipitation to the country's west but below the average in the southeastern grain growing area. April was warm and one of the driest months in half a century. In the first half of April, the daily temperatures were below the freezing threshold throughout the country, while in the second half of April, summer temperatures were reached. Such weather slowed winter grain development and delayed corn plantings. However, the abundant rains and lower-than-average temperatures in May supported winter grains development, favored corn germination, and boosted soil moisture levels across the country. May was among the top four most rainy May months in Romania over the past fifty years, delaying again the development of the crops. Overall, a recovery in winter grains output is projected in Romania. Hot days in June to some extent accelerated the winter grains maturation process, offsetting initial delays and triggering water stress, particularly in the case of spring grains such as corn.

Prospects for winter grain crops in Bulgaria are optimistic due to favorable weather and larger planted area. The fall planting for winter grains was done at the optimal time. Overall, moderate temperatures and sufficient rainfall provided favorable conditions for winter crops, despite a cold spell in early April and lower-than-usual temperatures around mid-May. Abundant rainfall at the end of May improved soil moisture levels, offering fair conditions for grain formation. Winter crops show above-average biomass accumulation and are advanced in development.

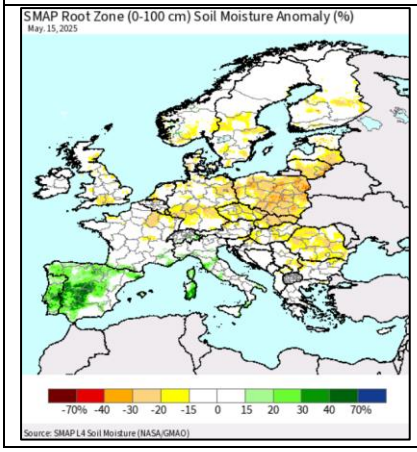
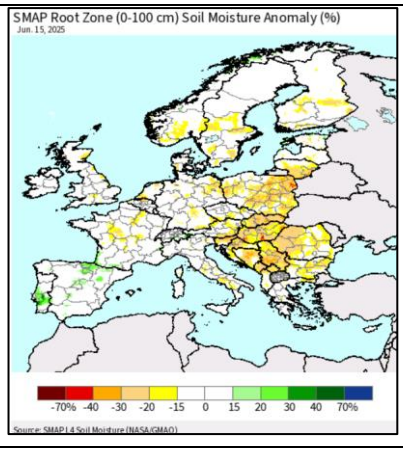
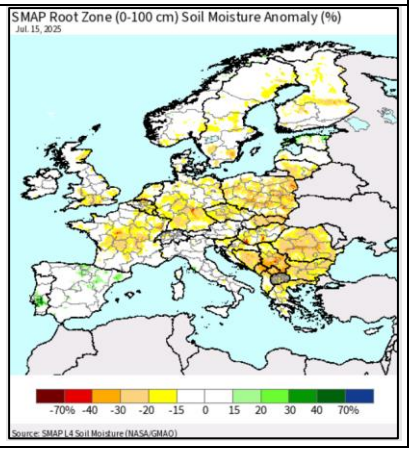
The smaller area devoted to corn in Bulgaria was planted with delays. The initial expectations were for possible recovery in yield and production of corn after a record low crop in MY 2024/25, although extreme summer temperatures and dryness in July are already negatively impacting yields.

In **Hungary**, consecutive years of drought have led to changes in the country's crop structure, with winter grains increasing area at the expense of corn. Farmers' decisions are increasingly driven by production risk aversion rather than by market signals. Following an unusually cool month of May, summer began with heat waves and no precipitation. These conditions resulted in early ripening and reduced yields and specific weights. Moreover, the severe storms in mid-July provoked crops lodging in the fields that had not yet been harvested. Therefore, despite the increased area, the reduction in yields is expected to prevent production levels from expanding.

In **Czechia**, ongoing drought conditions and a decline in the efficacy of crop protection products is driving farmers' shift to less input intensive crops. The area planted to rye and barley has declined while area planted to durum wheat and oats has increased. Similar to last season, spring crop development was hindered by alternating waves of severe frost and drought. Hailstorms in June caused localized damage to agricultural crops, especially wheat and barley. However, overall grain production in MY 2025/26 is expected to exceed previous season's levels.

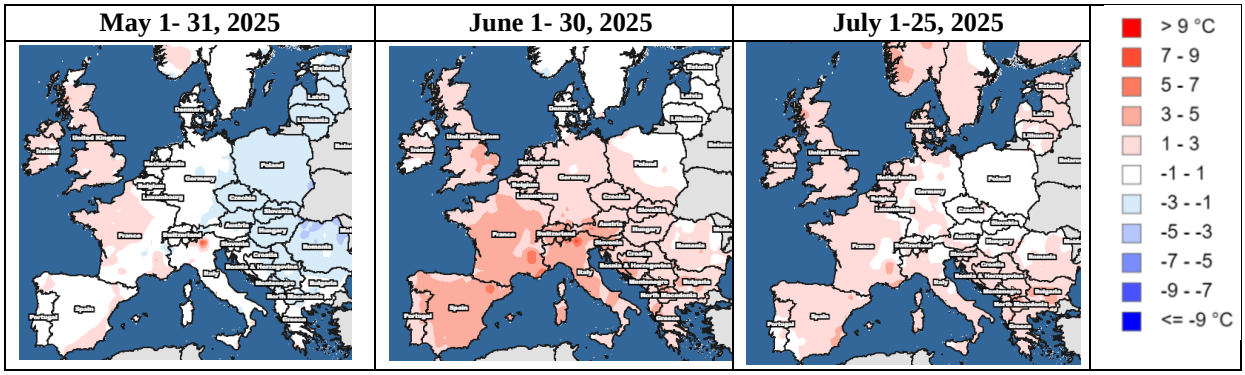
After the initially good winter grains crop establishment, the MY 2025/26 grain harvest in **Slovakia** is being significantly impacted by extreme drought, low temperatures in May in contrast with high temperatures registered in June, and intense thunderstorms. Nonetheless, producers are still cautiously optimistic and project average yields.

Map 1. Soil Moisture Anomaly

May 15, 2025	June 15, 2025	July 15, 2025
		

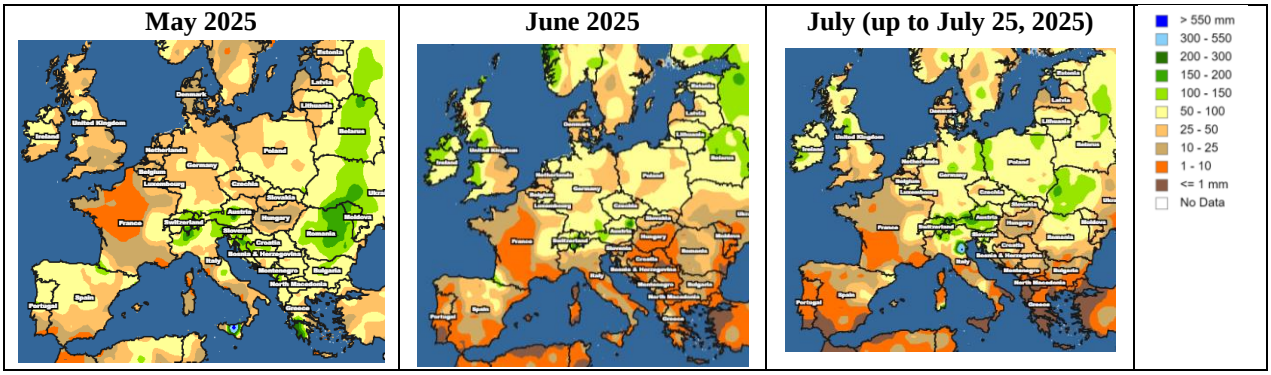
Source: IPAD/GMA/ FAS/USDA.

Map 2. Average Temperature Departure from Normal



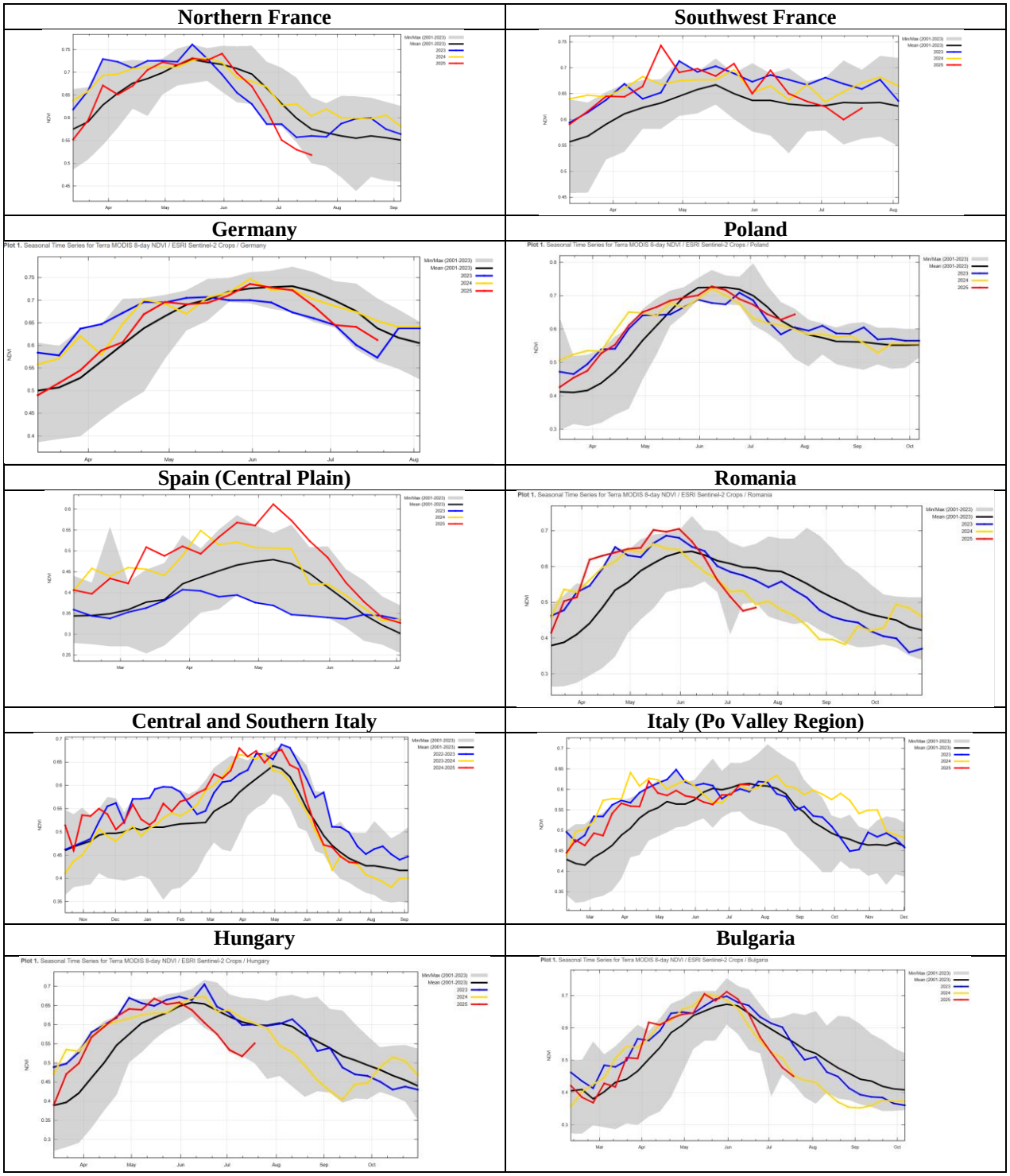
Source: IPAD/GMA/ FAS/USDA.

Map 3. Total Rainfall (mm)



Source: IPAD/GMA/ FAS/USDA.

Figure 3. NDVI in Main Grain Producing Member States



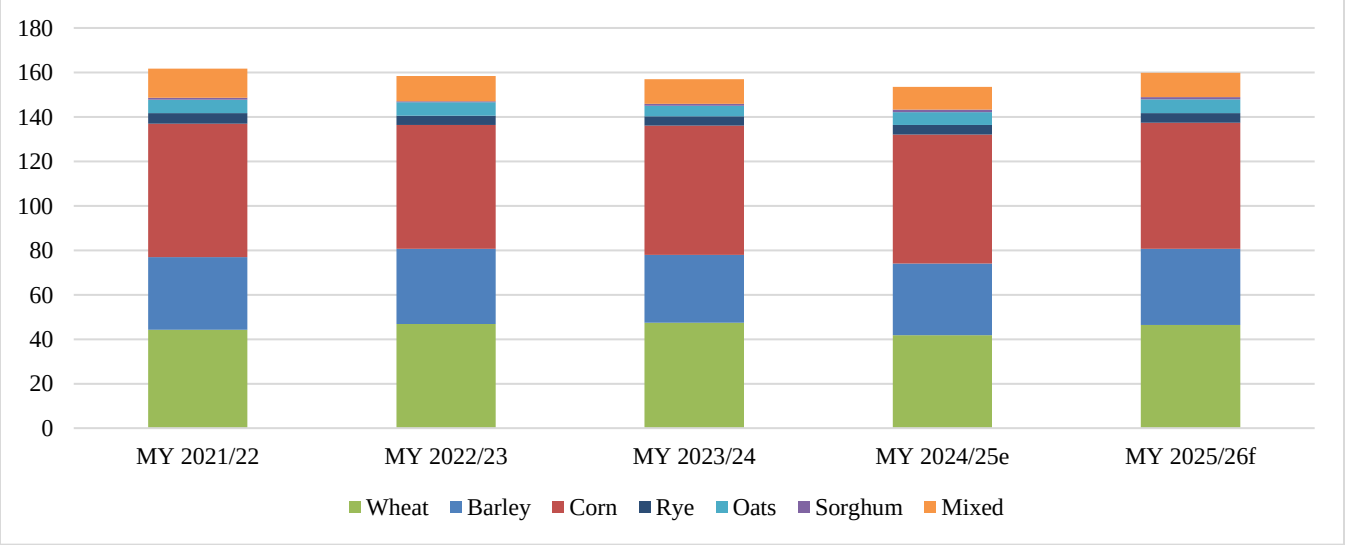
Source: IPAD/GMA/ FAS/USDA.

EU grain production is largely dedicated to animal feed, which represents nearly two-thirds of total grain consumption in the EU. Food uses account for less than one third of total disappearance, whereas industrial processes (including biofuels[2]) represent just below ten percent of the EU's total grain demand.

EU total feed grains demand is projected to grow marginally in MY 2025/26, driven by the reactivation of demand, particularly in Spain, France, Romania, and Hungary, together with the Nordic countries, that counters the declines projected for the Netherlands and Bulgaria. The drivers for the grain demand increase in these Member States include positive feeding margins in poultry and swine production operations. Slaughter at higher live weight in the case of the swine sector, given the poorer conversion rate at this stage, boosts affordable feed consumption. In the case of dairy farms, the larger feed demand originates from the increases registered in productivity per animal, that ultimately derive from improved genetics and richer feeds. Nevertheless, further feed demand expansion is limited by the negative impact of animal diseases or strict environmental rules.[3]

Feed corn remains the preferred grain used for feed purposes in MY 2025/26. However, the ample EU wheat and barley crop is expected to boost these grains' consumption in MY 2025/26. The reinforcement of Ukraine's tariff rate quota (TRQ) for wheat is expected to reduce this grain's competitiveness in feed, yielding space to corn in the feed formula, particularly as of Q4 of 2025.

Figure 5. Feed Grain Uses in the EU (1,000 MT)



Source: FAS EU Posts.

[2] Additional information regarding the EU's Bioethanol Sector is available in the latest EU Biofuels Report and in the latest Biofuel Mandates in the EU by Member State.
[3] Additional information regarding the EU's animal production is available in the latest EU Livestock, EU Poultry and EU Dairy GAIN Reports.

A moderate increase of Food, Seed and Industrial (FSI) use is projected for MY 2025/26, driven by declining inflation and flourishing tourism activity that is boosting consumption in the Hotels, Restaurants, and Institutions (HRI) channel and the demand for starch and other industrial grain-based products such as maltodextrin, glucose, ethanol, Dried Distillers' Grains with Solubles (DDGS), and Corn Gluten Feed (CGF).

Overall grain exports in MY 2025/26 are expected to recover compared to MY 2024/25, when unfavorable weather conditions slashed yields and deteriorated grain quality aspects in the main grain export-oriented EU Member States such as France, Romania, Poland, and Germany. In MY 2025/26, the EU's total grain imports needs are expected to decline compared to MY 2024/25, given the increased domestic availability in main importing countries, such as Spain. Similarly, the phase out of Ukraine's Autonomous Trade Measures (ATM)s,[4] ending Ukraine's unlimited market access to the EU, is expected deviate Ukraine wheat, corn, and barley exports to other destinations and result in increased intra-EU trade and boost competition in EU's traditional grain export markets.

Grain ending stocks are expected to return to more comfortable levels in MY 2025/26, driven by the larger EU winter grains production. Conversely, lower stocks are projected for corn, reflecting the lower domestic crop projected.

Section I. Wheat

Table 2. Production, Supply and Distribution – Wheat

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	24,320	24,270	22,701	22,680	24,000	23,900
Beginning Stocks (1000 MT)	16,268	16,268	15,789	15,750	12,362	13,500
Production (1000 MT)	135,375	135,180	122,123	120,870	137,250	138,630
MY Imports (1000 MT)	12,658	12,658	10,700	10,400	6,500	7,000
TY Imports (1000 MT)	12,658	12,658	10,700	10,400	6,500	7,000
TY Imp. from U.S. (1000 MT)	343	331				
Total Supply (1000 MT)	164,301	164,106	148,612	147,020	156,112	159,130
MY Exports (1000 MT)	38,012	38,012	26,500	28,800	32,500	35,200
TY Exports (1000 MT)	38,012	38,012	26,500	28,800	32,500	35,200
Feed and Residual (1000 MT)	46,500	47,424	45,500	41,820	46,500	46,430
FSI Consumption (1000 MT)	64,000	62,920	64,250	62,900	64,500	63,000
Total Consumption (1000 MT)	110,500	110,344	109,750	104,720	111,000	109,430
Ending Stocks (1000 MT)	15,789	15,750	12,362	13,500	12,612	14,500
Total Distribution (1000 MT)	164,301	164,106	148,612	147,020	156,112	159,130
Yield (MT/HA)	5.5664	5.5698	5.3796	5.3294	5.7188	5.8004
(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 2025/2026 = July 2025 - June 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

[4] ATMs allowed tariff-free entry of Ukrainian agricultural products, including a significant increase in wheat imports until June 5, 2025. For additional details, please consult this report's Policy Section.

Overall, EU wheat crop in MY 2025/26 is expected to increase to 138.6 MMT, fueled by a sharp recovery of the French wheat crop as well as larger German, Romanian, Italian, Slovak and Spanish crops, combined with a stable Polish crop and marginally lower Hungarian crop. The EU wheat area for MY 2025/26 has been marginally adjusted upward from previous estimates.

Weather conditions throughout the wheat growing season were considerably different across the EU. Bulgaria and Romania benefited from adequate rainfall throughout the winter and spring of 2025 leading to optimal growing conditions, which could lead to above-average yields and good quality. After a disastrous crop in MY 2024/25, good weather throughout the growing season and abundant underground water reservoirs will enable France to get a decent wheat crop in MY 2025/26, significantly up from MY 2024/25. While some dryness in the late spring and excessive temperature may lead to small specific weight grains, especially in Northern France, both large volume and good quality are expected overall. In Germany, much improved planting conditions, larger areas and good weather conditions throughout the growing season, despite some dryness in some regions in April and May, will lead to a larger wheat crop in MY 2025/26.

In Northern Italy, persistent wet weather lasting until mid-May 2025 led to increased pest and disease pressure. However, the return of warmer conditions is expected to support an average wheat yield. In Southern Italy, particularly in Sicily, favorable weather throughout the growing season is projected to result in above-average durum wheat yields.

The wettest spring ever recorded in Spain, combined with mild temperatures during most of the crop cycle, has boosted wheat yields to over average levels and resulted in a two-week delay in terms of development. The high temperatures registered in late May and early June came too late to reduce yields potential. The wheat crop in Czechia is expected to remain at the MY 2024/25 level. On the other hand, the Slovak wheat crop is expected to grow significantly due to favorable weather conditions.

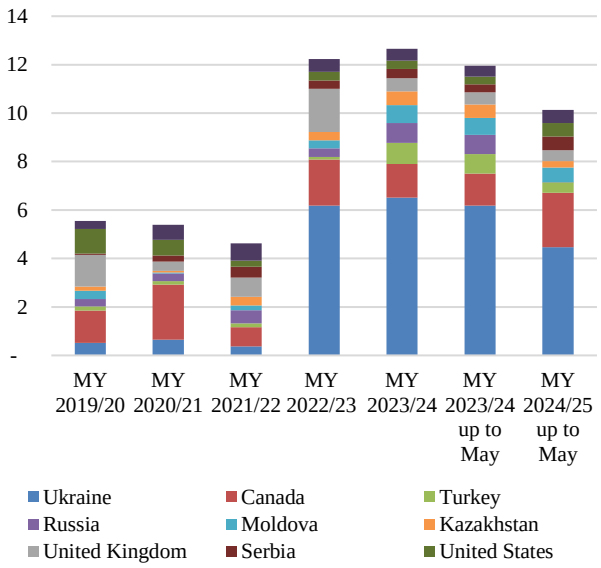
Hungary suffered from dry weather in the spring as well as early heatwaves, which boosted the ripening of the crop and led to an early harvest. Significant lodging was also reported due to thunderstorms in July 2025, further lowering the yield potential from their high 2024 level. The Polish wheat crop suffered from a late frost in April 2025 which also lowered spring wheat plantings. The dryness which lasted until May in most of Poland also negatively impacted the wheat crop potential.

Wheat imports are foreseen to significantly decrease in MY 2025/26 in response to the significant recovery in EU domestic wheat availability, especially in Spain, and a slightly lower Italian durum wheat demand. Similarly, the decrease will be enhanced by the implementation of a 1 MMT zero-duty import quota (538,333 MT from 6 June 2025 to 31 December 2025)[5] from Ukraine, in place of the Autonomous Trade Measures (ATM). The new quota severely limits EU imports of Ukrainian wheat, which are estimated to reach close to 5 MMT in MY 2024/25. In MY 2024/25, EU wheat imports have been revised up slightly due to higher than anticipated imports of competitively priced Ukrainian wheat shipments into Spain.

EU wheat exports in MY 2025/26 are anticipated to increase in line with a larger domestic crop projected. MY 2024/25 EU wheat exports estimates have been revised up from previous low forecasts due to higher exports from France, Latvia, Lithuania, and Bulgaria stemming from its increased price competitiveness in the second half of the marketing year. Romania and Bulgaria were the largest EU wheat exporting countries in MY 2024/25.

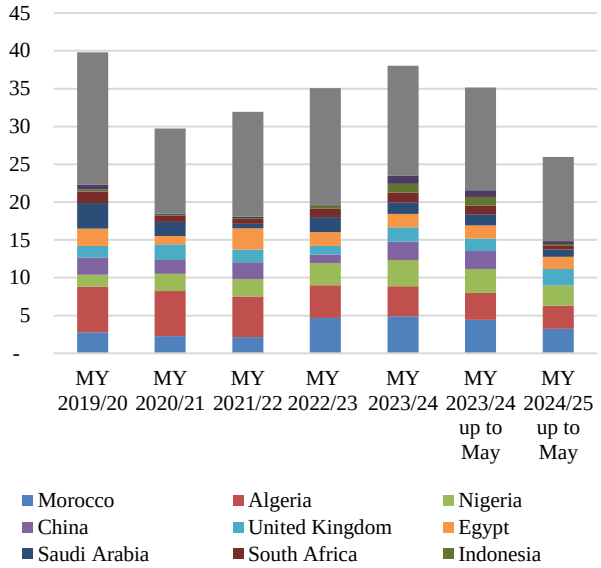
MY 2025/26 wheat feed uses in the EU are projected to raise, due to a higher crop combined with very competitive prices. With a higher supply, wheat stocks are expected to increase in MY 2025/26, easing the tension in the previously tighter market.

Figure 6. Main Wheat Suppliers to the EU (MMT)



Source: Trade Data Monitor LLC. Trade data include wheat products.

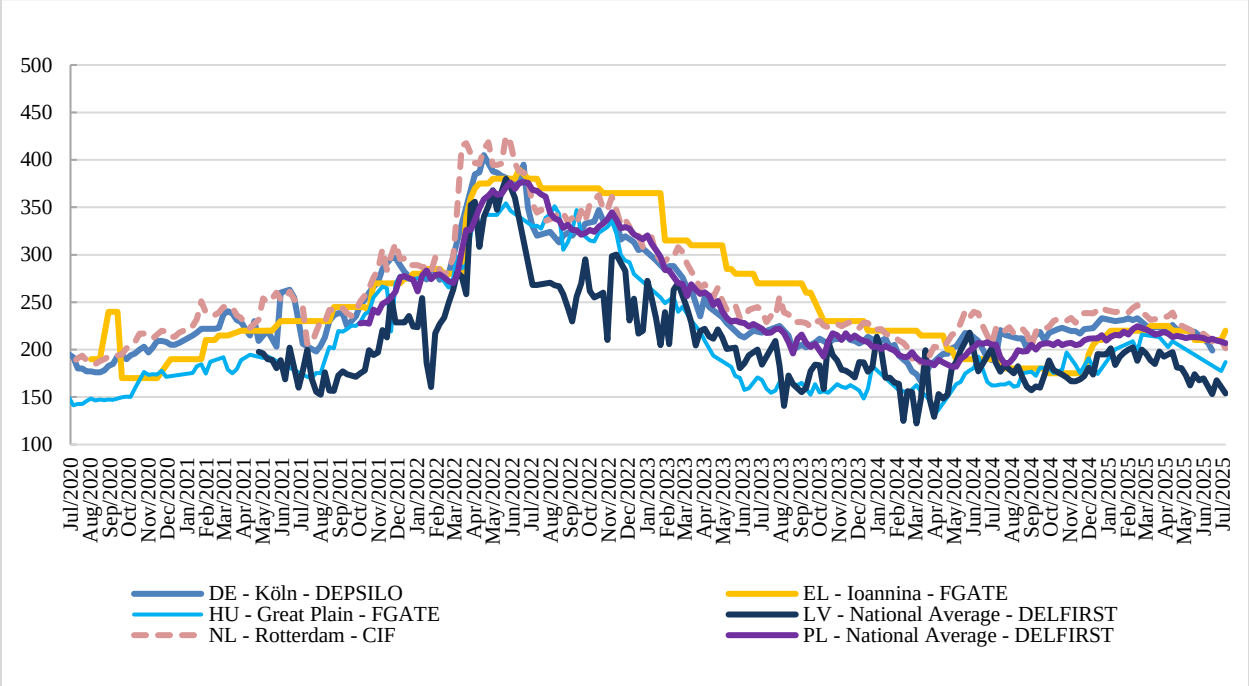
Figure 7. Main Export Destinations for EU Wheat (MMT)



Source: Trade Data Monitor LLC. Trade data include wheat products.

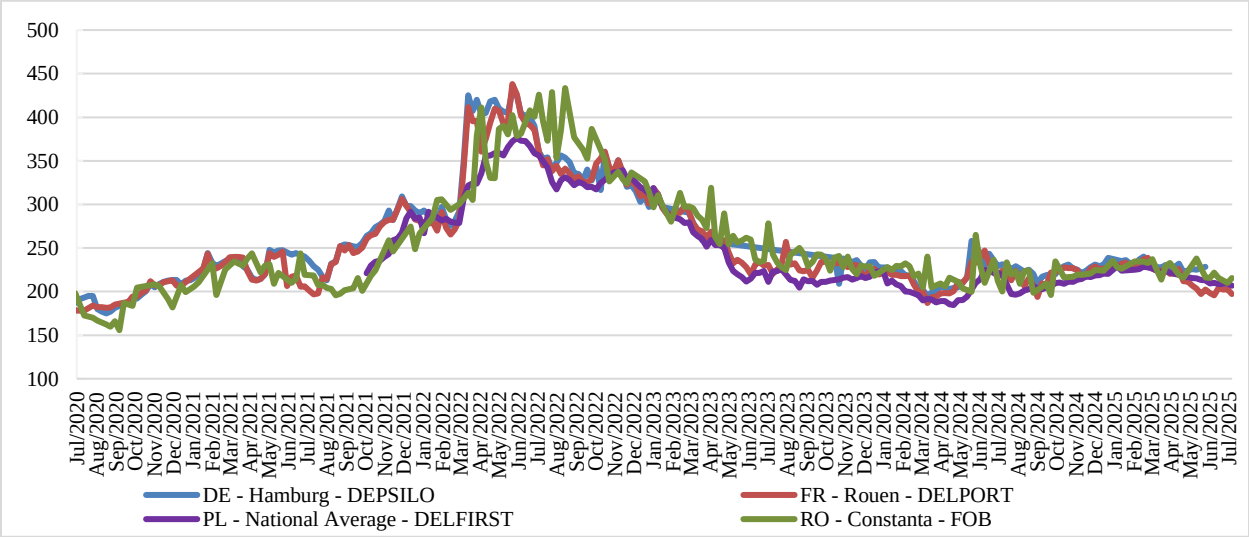
[5] For additional details, please consult this report's Policy Section.

Figure 8. EU Feed Wheat Prices (Euros/MT)



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

Figure 9. EU Milling Wheat Prices (Euros/MT)



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

Section II. Coarse Grains[6]

Corn

Table 3. Production, Supply and Distribution – Corn

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8,283	8,283	8,704	8,600	8,250	8,050
Beginning Stocks (1000 MT)	8,024	8,024	7,314	7,178	6,326	6,278
Production (1000 MT)	61,947	61,950	59,312	59,500	60,000	58,150
MY Imports (1000 MT)	19,832	19,833	20,000	20,300	20,500	20,900
TY Imports (1000 MT)	19,832	19,833	20,000	20,300	20,500	20,900
TY Imp. from U.S. (1000 MT)	1,333	1,009				
Total Supply (1000 MT)	89,803	89,807	86,626	86,978	86,826	85,328
MY Exports (1000 MT)	4,389	4,389	2,400	2,500	3,000	2,500
TY Exports (1000 MT)	4,389	4,389	2,400	2,500	3,000	2,500
Feed and Residual (1000 MT)	58,300	58,200	58,200	58,000	57,700	56,700
FSI Consumption (1000 MT)	19,800	20,040	19,700	20,200	20,100	20,250
Total Consumption (1000 MT)	78,100	78,240	77,900	78,200	77,800	76,950
Ending Stocks (1000 MT)	7,314	7,178	6,326	6,278	6,026	5,848
Total Distribution (1000 MT)	89,803	89,807	86,626	86,978	86,826	85,328
Yield (MT/HA)	7.4788	7.4792	6.8143	6.9186	7.2727	7.2236
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

EU corn production is forecast to plunge to 58.1 MMT in MY 2025/26, down from the previous Post estimate and previous season levels. The reasons for the production decline include both the sharp area reduction and the worsening of prospects. If the drought persists and heat waves continue with the same strength and persistence, EU corn yields could be further reduced, particularly to the EU's southeast.

The planting conditions were similar across the EU, with a few exceptions. The cold weather in April, in some instances with freezing temperatures, delayed corn plantings across EU. Lower-than average temperatures in May with good rainfall boosted soil moisture levels but hindered plant development. Weather conditions in June hastened the growth process, but heat waves and lack of rainfall in July cancelled some of the positive effects of the earlier moisture, reducing the crop capacity to perform. Signs of drought impact and heat have become visible in the fields. These were more evident in Romania and Hungary, which reported large downward revisions in harvest expectations, which are not being outweighed by improved prospects in France, Germany, Spain, Italy, Austria, and Belgium.

[6] 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. Is the total of corn, barley, rye, oats, mixed grains, and sorghum.

In Romania, the corn production estimate was significantly trimmed compared to the spring estimates, though above the previous season. This is due to both a historic low-planted area, as well as the frequency of days with high temperatures and no significant rain in the first part of the summer.

In neighboring Hungary, over ten percent of the planted area suffered total drought damage. Six weeks of extremely dry and hot weather caused extensive damage to corn, prompting a sharp downward revision in harvest. Similarly, in Slovakia, the crop performance was impacted by the rainfall deficit in the spring and the cold weather in May.

A cold spring created less favorable conditions for corn in Poland, so the harvest is now projected lower. Moving south, in Bulgaria, the cold spell in the middle of May hampered the germination and early vegetative development of corn, while temperatures above 30 Celsius degrees at the end of June began to negatively affect the plants. The weather in July was not favorable for corn development with extreme high temperatures and dryness.

In Northern Italy, the corn crop is developing well, supported by adequate water availability. The delays caused by the wet spring have been partially offset by above-average temperatures in the following weeks.

France is revised up slightly both area and harvest, though both remain below the previous season. However, very high temperature in the southwest of France in the first part of July may raise concerns regarding the corn flowering process.

In MY 2025/26, fears about another season with corn fields damaged by heat waves and prolonged dryness resulted in a record low corn planted area of just above 8 million Ha to the advantage of winter crops. This downward trend was more pronounced in EU Member States that experienced large losses in the previous years with this crop, such as Romania, Hungary, Bulgaria but also in France, Slovakia, and Croatia. Conversely, area increases were reported in Poland, Austria, and Spain, where the wettest spring in record allowed farmers to increase significantly corn area, but these could not offset the contractions expected in the other EU Member States.

Imports are revised up in MY 2025/26 to cover the supply gap created by a lower domestic crop. Spain, the Netherlands, Italy, Portugal, and Ireland, which are corn-deficient, are anticipated to be the major recipients. With a harvest rebound, the main corn supplier to EU, Ukraine, is foreseen to increase its deliveries, though its competitiveness is threatened by the recently enforced trade agreement between EU and Ukraine.[7] Ample new crop supplies foreseen for Brazil and the United States may provide additional relief for the EU market, though the volume imported from the latter depends on the outcome of the ongoing US-EU trade negotiations.

MY 2024/25 imports were adjusted slightly upward to satisfy the increased consumption. Ukraine, the United States, Brazil, and Canada are the key suppliers this season. While still on top, the Ukrainian

[7] For additional details consult Section IV Policy.

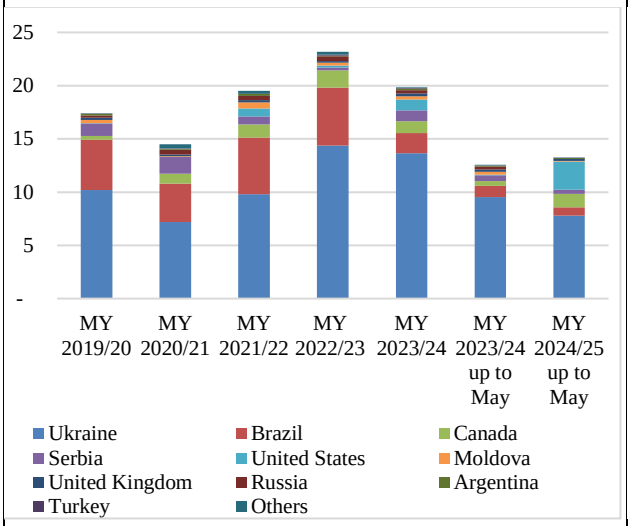
shipments to the EU declined year-on-year by nearly twenty percent during the first eight months of MY 2024/25 due to the country's lower exportable supply. In contrast, during the same timeframe, Canada nearly tripled its exports to the EU, while the United States supplied 2.6 MMT, up from 37,000 MT in the previous season, amid a large exportable supply and improved competitiveness. The higher internal demand and the somewhat delayed crop development is expected to reduce Brazil's corn competitiveness, weakening its presence on the EU market during the summer months. Other smaller suppliers, such as Moldova and Serbia, drastically reduced their shipments to EU due to production shortfalls.

On the global market, EU corn presence is anticipated to be small in MY 2025/26. The export estimate was revised downward as compared to the spring estimate to reflect the lower harvest projection at the EU level. MY 2025/26 exports are now forecast to remain unchanged year-on-year. This would be the second consecutive year with EU exports halved by adverse weather conditions. In terms of destinations, the United Kingdom is likely to remain the EU's most important corn export destination in MY 2025/26. Similarly, in MY 2024/25, EU corn exports are projected significantly down from previous season's levels due to poor harvests in the leading EU corn exporting Member States. Exports to most destinations declined, except for the United Kingdom, where they grew, primarily because of French shipments. Despite their geographical position advantage, the Black Sea EU countries, Romania and Bulgaria, could not fully capitalize on the tariff-rate quotas approved for import by Türkiye, because of the reduced exportable supply.

EU's total corn consumption is forecast to decline to 76.9 MMT in MY 2025/26, due to a combination of reduced EU corn production and an ample supply of competitively priced alternative feed grains, such as feed wheat and barley. A lower corn use in feed is largely determined by Spain, and to a less extent by Germany, Hungary, Portugal, and the Netherlands. Feed corn uses increase in Romania, Poland, Ireland, and Belgium, but are not large enough to offset the feed decline in the major corn-users. Total corn consumption is anticipated to be stable in MY 2024/25, with the lower feed grain use being compensated by increased industrial uses. Although corn is the most competitive option in tandem with soybean meal in feed ratios, the feed use is anticipated to decrease in the last quarter of the current season, due to availability of the newly harvested alternative MY 2025/26 feed grains. In contrast to feed, industrial corn utilization figure in MY 2024/25 is revised further up to reflect a higher utilization in Germany, Austria, and Bulgaria, buoyed by a robust starch demand.

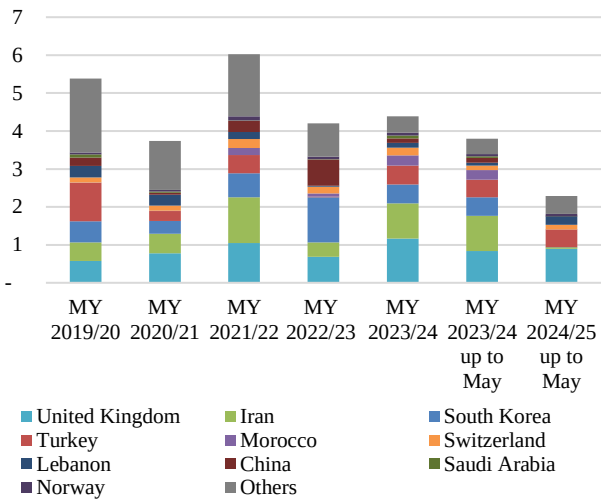
Inventories at the end of MY 2025/26 are projected to tighten further on account of the downwards revision of harvest prospects and the only moderate increase projected for imports. In MY 2024/25, the carry-out stocks are set to decline over the previous season, due to production shortfall and steady consumption, combined with the delays and lower volume anticipated of Brazilian corn shipments.

Figure 10. Main Corn Suppliers to the EU (MMT)



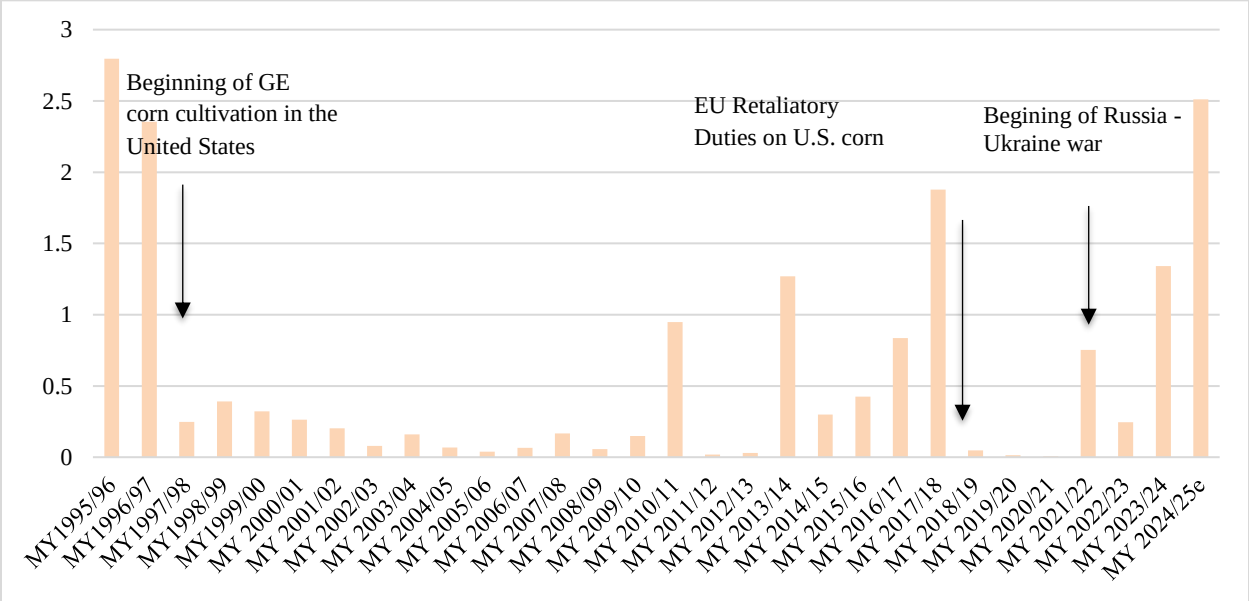
Source: Trade Data Monitor LLC.

Figure 11. Main Export Destinations for EU Corn (MMT)



Source: Trade Data Monitor LLC.

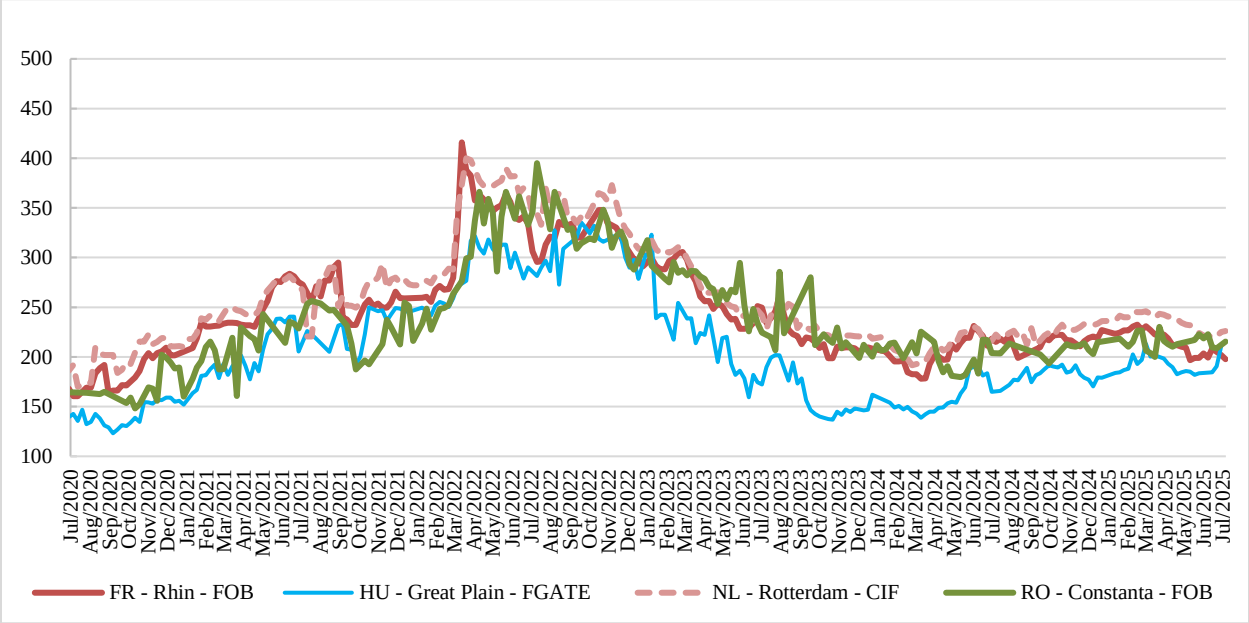
Figure 12. U.S. Corn Exports to the EU (MMT)[8]



Source: Trade Data Monitor, LLC data and Exports Sales Report.

[8] Corn Marketing Year is October - September.

Figure 13. EU Corn Prices (Euros/MT)



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

Barley

Table 4. Production, Supply, and Distribution – Barley

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	10,350	10,327	10,319	10,290	10,380	10,170
Beginning Stocks (1000 MT)	5,726	5,726	5,632	5,444	5,560	5,919
Production (1000 MT)	47,903	47,383	50,328	50,115	53,100	53,680
MY Imports (1000 MT)	1,962	1,929	1,200	1,040	1,000	900
TY Imports (1000 MT)	1,625	1,625	1,100	900	1,000	900
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	55,591	55,038	57,160	56,599	59,660	60,499
MY Exports (1000 MT)	6,759	6,759	5,900	5,840	6,800	6,800
TY Exports (1000 MT)	6,694	6,695	6,100	6,100	6,800	6,800
Feed and Residual (1000 MT)	30,700	30,485	33,000	32,240	34,300	34,300
FSI Consumption (1000 MT)	12,500	12,350	12,700	12,600	12,800	12,850
Total Consumption (1000 MT)	43,200	42,835	45,700	44,840	47,100	47,150
Ending Stocks (1000 MT)	5,632	5,444	5,560	5,919	5,760	6,549
Total Distribution (1000 MT)	55,591	55,038	57,160	56,599	59,660	60,499
Yield (MT/HA)	4.6283	4.5883	4.8772	4.8703	5.1156	5.2783
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

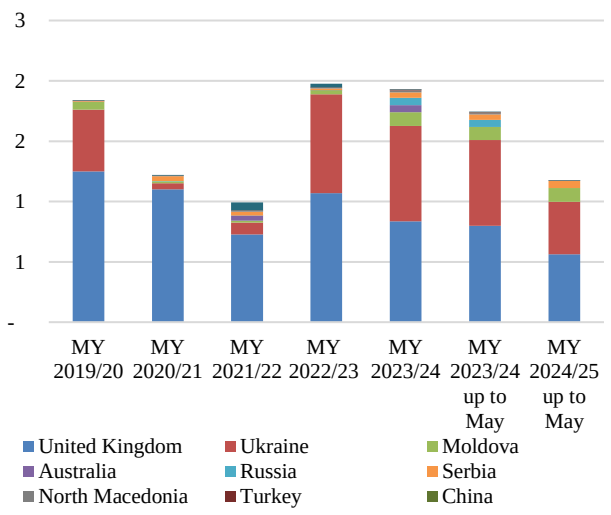
Barley production in the EU is expected to amount to 53.7 MMMT, with higher yields projected year-on-year. Initial harvest results are positive in Spain, France, Germany, Romania, Bulgaria, Hungary, and Italy. Barley yields are also promising in northern EU Member States. High early summer temperatures in the final growth stages accelerated barley-ripening in most parts of the continent. In central Europe, heatwaves and the lack of rainfall hastened the end of the growing cycle and hindered grain filling. However, since barley is harvested relatively earlier than other grain crops, yields were less affected by the hot and dry conditions prevailing at the end of the winter grains season.

The EU barley area for MY 2025/26 is estimated at 10.2 million Ha and has been revised down compared to previous season levels, mostly in the Nordic countries. Farmers in the main producing countries, such as France, Germany, Denmark, and Poland have reduced their plantings, with the notable exceptions of Spain and Romania, where area planted to barley has expanded.

Total barley consumption in MY 2025/26 is set to edge up to 47.2 MMT, driven by solid demand for feed barley due to better supply and improved competitiveness against corn in the EU market, particularly in large barley producers such as France and Spain. Additionally, barley and wheat are expected to fill the gap in the EU's feed formula left by poor corn harvests anticipated in Romania and Hungary. Despite the sluggish demand by the EU's malting industry, the enhanced processing capacities in the biofuel industry in Hungary is projected to lead to moderate growth in FSI consumption.

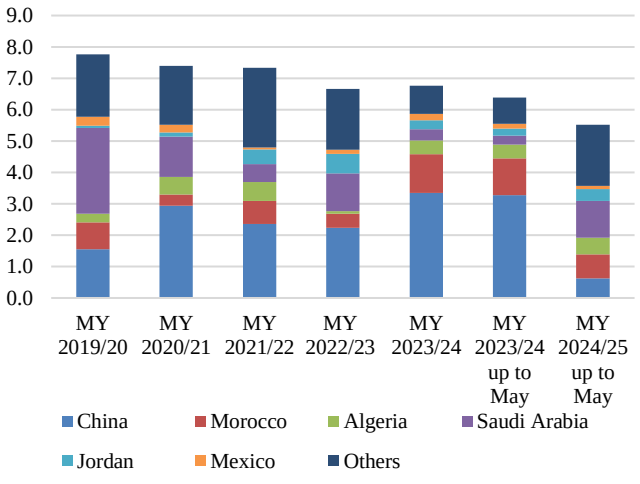
Given the promising EU barley production volumes, EU barley imports are projected to remain low, at around 0.9 MMT, while exports are expected to bounce back to 6.8 MMT in MY 2025/26. France has potential to improve its position in China with competitive prices against Australia and Ukraine. Germany is also expected to maintain exports to the Middle East and North Africa, while Romania has an opportunity to increase its exports to these markets. Due to the hike in production and improved availability of wheat, largely preferred by feed compounders, barley stocks are expected to rise by the end of MY 2025/26.

Figure 14. Main Barley Suppliers to the EU (MMT)



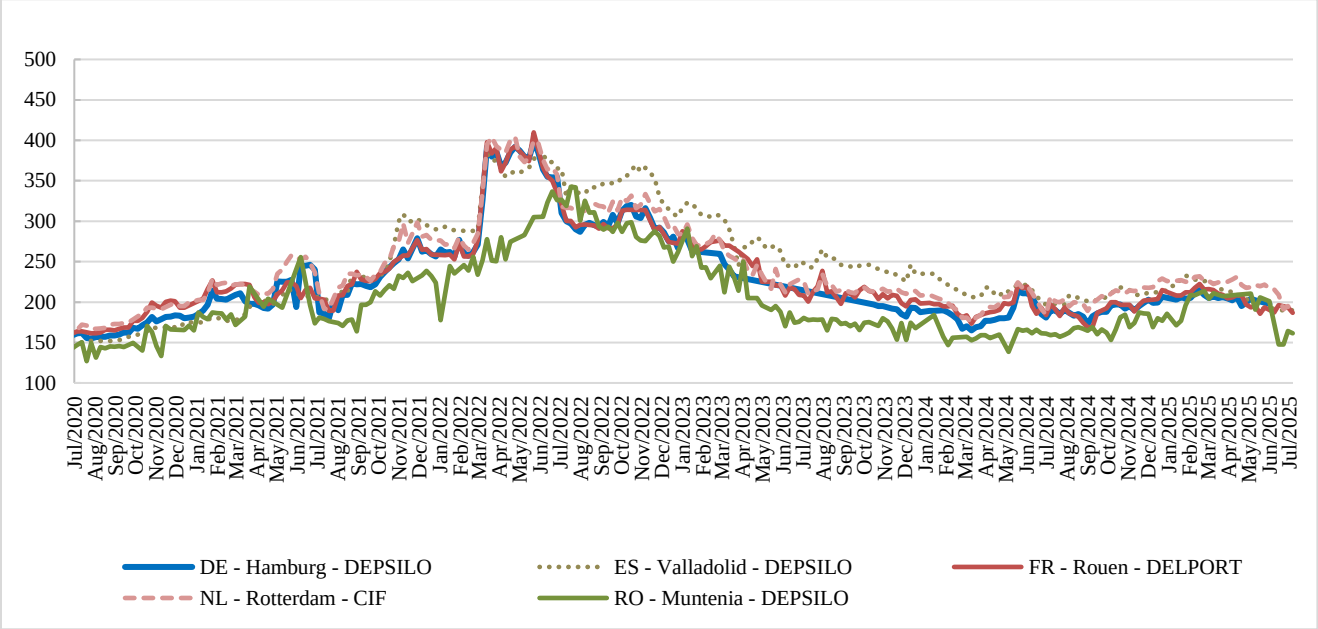
Source: Trade Data Monitor LLC.

Figure 15. Main Export Destinations for EU Barley (MMT)



Source: Trade Data Monitor LLC.

Figure 16. EU Barley Prices (Euros/MT)



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

Rye

Table 5. Production, Supply and Distribution – Rye

Rye	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1,881	1,877	1,732	1,731	1,780	1,750
Beginning Stocks (1000 MT)	1,202	1,202	1,313	1,343	929	926
Production (1000 MT)	7,647	7,644	6,896	6,876	7,400	7,180
MY Imports (1000 MT)	187	187	20	40	40	25
TY Imports (1000 MT)	167	167	25	25	40	40
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	9,036	9,033	8,229	8,259	8,369	8,131
MY Exports (1000 MT)	238	238	100	114	150	150
TY Exports (1000 MT)	213	213	125	150	150	150
Feed and Residual (1000 MT)	4,400	4,168	4,200	4,280	4,450	4,320
FSI Consumption (1000 MT)	3,085	3,284	3,000	2,939	3,000	2,930
Total Consumption (1000 MT)	7,485	7,452	7,200	7,219	7,450	7,250
Ending Stocks (1000 MT)	1,313	1,343	929	926	769	731
Total Distribution (1000 MT)	9,036	9,033	8,229	8,259	8,369	8,131
Yield (MT/HA)	4.0654	4.0725	3.9815	3.9723	4.1573	4.1029
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Oats

Table 6. Production, Supply and Distribution – Oats

Oats	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2,284	2,284	2,485	2,473	2,500	2,545
Beginning Stocks (1000 MT)	596	596	253	251	597	528
Production (1000 MT)	5,941	5,922	7,754	7,635	7,450	8,200
MY Imports (1000 MT)	109	110	65	56	90	80
TY Imports (1000 MT)	98	98	65	60	90	80
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	6,646	6,628	8,072	7,942	8,137	8,808
MY Exports (1000 MT)	118	118	100	100	125	150
TY Exports (1000 MT)	118	118	115	120	125	150
Feed and Residual (1000 MT)	4,825	4,809	5,850	5,800	5,800	6,200
FSI Consumption (1000 MT)	1,450	1,450	1,525	1,514	1,525	1,533
Total Consumption (1000 MT)	6,275	6,259	7,375	7,314	7,325	7,733
Ending Stocks (1000 MT)	253	251	597	528	687	925
Total Distribution (1000 MT)	6,646	6,628	8,072	7,942	8,137	8,808
Yield (MT/HA)	2.6011	2.5928	3.1203	3.0873	2.9800	3.2220
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Mixed Grains[9]

Table 7. Production, Supply and Distribution – Mixed Grains

Mixed Grain	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	3,070	3,021	2,870	2,865	2,900	2,606
Beginning Stocks (1000 MT)	968	968	925	917	772	737
Production (1000 MT)	12,807	12,706	11,797	11,578	12,200	12,500
MY Imports (1000 MT)						
TY Imports (1000 MT)						
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	13,775	13,674	12,722	12,495	12,972	13,237
MY Exports (1000 MT)	-	-	-	-	-	-
TY Exports (1000 MT)	-	-	-	-	-	-
Feed and Residual (1000 MT)	11,200	11,100	10,500	10,300	10,700	10,920
FSI Consumption (1000 MT)	1,650	1,657	1,450	1,458	1,450	1,459
Total Consumption (1000 MT)	12,850	12,757	11,950	11,758	12,150	12,379
Ending Stocks (1000 MT)	925	917	772	737	822	858
Total Distribution (1000 MT)	13,775	13,674	12,722	12,495	12,972	13,237
Yield (MT/HA)	4.1717	4.2059	4.1105	4.0412	4.2069	4.7966
(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 2025/2026 = October 2024 - September 2025						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

[9] 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	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	149	156	221	225	200	184
Beginning Stocks (1000 MT)	15	15	21	41	84	89
Production (1000 MT)	794	818	1,089	1,084	975	895
MY Imports (1000 MT)	20	20	110	75	100	75
TY Imports (1000 MT)	16	16	120	60	100	75
TY Imp. from U.S. (1000 MT)	1	1				
Total Supply (1000 MT)	829	853	1,220	1,200	1,159	1,059
MY Exports (1000 MT)	13	12	20	15	15	15
TY Exports (1000 MT)	11	11	15	15	15	15
Feed and Residual (1000 MT)	780	785	1,100	1,080	1050	995
FSI Consumption (1000 MT)	15	15	16	16	16	16
Total Consumption (1000 MT)	795	800	1,116	1,096	1,066	1,011
Ending Stocks (1000 MT)	21	41	84	89	78	33
Total Distribution (1000 MT)	829	853	1,220	1,200	1,159	1,059
Yield (MT/HA)	5.3289	5.2436	4.9276	4.8178	4.875	4.8641
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Section III. Rice

Table 9. Production, Supply and Distribution – Rice

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	346	346	394	393	415	422
Beginning Stocks (1000 MT)	828	828	699	746	844	843
Milled Production (1000 MT)	1,371	1,370	1,595	1,537	1,770	1,646
Rough Production (1000 MT)	2,141	2,268	2,491	2,586	2,764	2,783
Milling Rate (.9999) (1000 MT)	6,404	6,041	6,404	5,944	6,404	5,914
MY Imports (1000 MT)	2,109	2,110	2,350	2,200	2,200	2,110
TY Imports (1000 MT)	2,411	2,414	2,300	2,250	2,200	2,150
TY Imp. from U.S. (1000 MT)	17	17				
Total Supply (1000 MT)	4,308	4,308	4,644	4,483	4,814	4,599
MY Exports (1000 MT)	359	362	400	390	425	415
TY Exports (1000 MT)	362	363	400	390	425	415
Consumption and Residual (1000 MT)	3,250	3,200	3,400	3,250	3,550	3,300
Ending Stocks (1000 MT)	699	746	844	843	839	884
Total Distribution (1000 MT)	4,308	4,308	4,644	4,483	4,814	4,599
Yield (Rough) (MT/HA)	6.1879	6.5549	6.3223	6.5802	6,6602	6.5948
(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 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

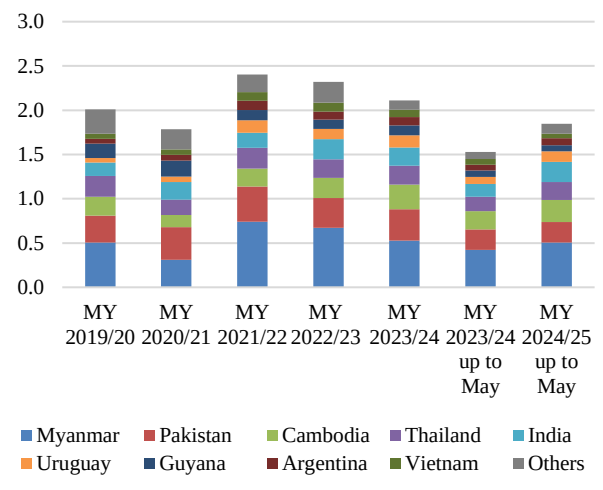
Source: FAS EU Posts.

In MY 2025/26, EU rice production[10] is forecast to rise over the previous year with growth in Italy, Spain, Greece, and Hungary outpacing the negligible decline anticipated in France. Production is expected to level off in Portugal, Bulgaria, and Romania. In MY 2025/26, EU rice area is forecast to increase driven mainly by Spain, Italy, and Greece. In Spain, improved irrigation water availability allowed farmers to maximize their rice planting potential. In Italy, the increase in rice area is linked to its profitability, as rice market prices remain strong. Rice planted area is projected to level off in Portugal, France, Bulgaria, and Romania.

EU rice consumption is projected to uptick in MY 2025/26, driven by easing inflation, sustained HRI activity, and rising demand for convenient and versatile meal options.

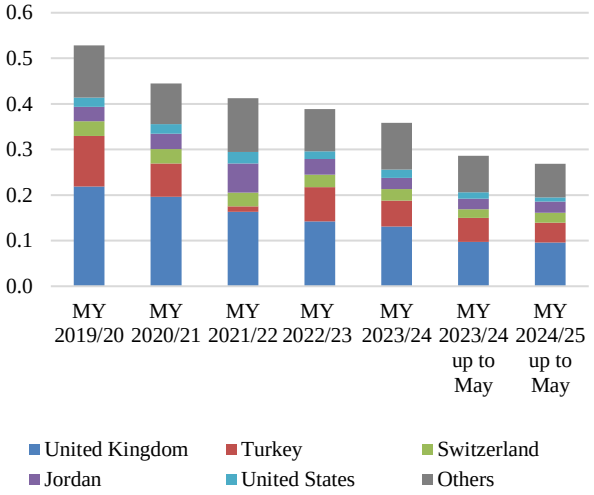
Larger availability in EU stocks and domestically produced rice in MY 2025/26 will lower demand for imports.

Figure 18. Main Rice Suppliers to the EU (MMT)



Source: Trade Data Monitor LLC.

Figure 19. Main Export Destinations for EU Rice (MMT)



Source: Trade Data Monitor LLC.

[10] EU rice production is concentrated in seven Member States: Italy, Spain, Greece, Portugal, Bulgaria, France, and Romania.

Section IV. Policy[11]

Common Agricultural Policy (CAP)

On May 14, 2025, the European Commission published a proposal to simplify the CAP. The proposed measures target the administrative burden, controls, implementation of the CAP as well as CAP crisis management tools. Notably, the proposal simplifies environmental requirements (GAECs for good agro-environmental conditions) linked to eco-payments for farmers. The proposal is now going through the EU legislative process and is expected to be adopted before the end of 2025.

EU – Ukraine Grain Trade Relations

From 2022 until June 5, 2025, the EU granted Ukraine full trade liberalization, suspending import duties, quotas, and trade defense measures for imports from Ukraine on a temporary basis through the Autonomous Trade Measures (ATM) Regulation.

Since June 6, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA). Most of the quotas are smaller than actual Ukrainian exports to the EU for calendar year 2024.[12] Regulation 1132/2025 reintroduced import quotas on Ukrainian agricultural goods, putting an end to the ATMs granted to imports from Ukraine to the EU in the aftermath of the Russia-Ukraine war. Under this Commission Regulation, EU imports of corn, sugar, poultry, eggs, and other key products now face tariff-rate quotas (TRQ). The quotas have been prorated for the seven months remaining of 2025. Once thresholds are met, standard tariffs would apply. The reintroduction of the TRQs includes new features such as the first come, first served system for the DCFTA quotas, based on the date of acceptance of the customs declaration, without need of prior licenses. Once quotas are used up, the Most Favored Nation (MFN) tariff will apply (95 Euros per MT of medium and low-quality wheat and 93 Euros per MT in the case of barley).

Table 10. TRQs for Ukraine (June 6, 2025 to December 31, 2025)[13]

Product	Annual Quantity (MT)	Quantity from June 6, 202 to December 31, 2025	Period	Origin	In-Quota Duty (€/MT)
Common wheat and products	1,000,000	583,333	Jan-Dec	Ukraine	12 (vs. 95 outside quota)
Corn and products	650,000	379,167	Jan-Dec	Ukraine	12 (vs. EU duty calculation)
Barley and products	350,000	204,167	Jan-Dec	Ukraine	12 (vs. 93 outside quota)

Source: Regulation (EU) 1132/2025.

[11] For additional information on EU Policy affecting grains, please consult the EU Annual Grain and Feed Report 2024.
[12] For additional information on EU Policy affecting grains, please consult the Ukraine: EU Updates Import Quotas for Ukrainian Product Report.
[13] For additional quotas to export grains to the EU, please consult the Policy Section in EU Annual Grain and Feed Report 2025

On June 30, 2025, the European Commission announced that it has reached an agreement in principle with Ukraine on the review of the DCFTA. As part of the agreement, Ukraine committed to gradually align its agricultural production standards with the EU by 2028. The agreement includes updated TRQs, for wheat, maize, barley, and oats. Please note that while the Commission announced the agreement, it still needs to be approved by a qualified majority of the 27 EU Member States.

EU – Russia and Belarus Grain Trade Relations

On July 9, 2025, Regulation 2025/1344 was published in the Official Journal. This Regulation increases tariffs by an additional 50 percent on top of the common rate for imports of certain goods originating in or exported directly or indirectly from the Russia and Belarus. The list includes oats, rice, products of the milling industries (malt, starches, inulin, wheat gluten), and cereal flour.

EU – United States Grain Trade Relations

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. Since then, the tariffs have been suspended several times, the latest until August 7, 2025, with Implementing Regulation 2025/1564.

On July 27, 2025, the United States and the European Union announced a deal on tariffs and trade with a single 15 percent tariff rate for the vast majority of EU exports and a zero-for-zero tariffs on certain agricultural products. At the time of writing, no details on the list of agricultural products that would benefit from zero tariffs have been published.

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[14]
f	Forecast (of a value/number for the next, not yet started, marketing year)
FAS	Foreign Agricultural Service
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.
Ha	Hectares
HRI	Hotels, Restaurants, and Institutions
IPAD	International Production Assessment Division
FSI	Food, Seed, and Industrial
MMT	Million Metric Tons
MS	EU Member State(s)
MT	Metric Ton (1000 kg)
MY	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
TMT	Thousand Metric Tons
TDM[15]	Trade Data Monitor LLC.
TY	Trade Year. July to June for wheat, October to September for coarse grains, and January to December for rice
U.S.	United States

Related Reports

Title	Date
Spain: Large Crop Expected to Reduce Spain Grain Import Needs	06/17/2025
Bulgaria: Grain and Feed Market Update	06/09/2025
United Kingdom: Grain and Feed Annual	06/04/2025
EU Annual Grain and Feed Report 2025	04/16/2025
EU Imposition of Duties on Chinese Lysine Presents Opportunity for US Suppliers	03/31/2025

[14] Austria, Belgium, Luxembourg, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden.

[15] Trade figures throughout the report are based on Trade Data Monitor LLC. data, which are sourced from EU Member State customs data, and the U.S. Bureau of Census.

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Attachments:

No Attachments