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Foreign Agricultural Service

GAIN Global Agricultural Information Network

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Report Name: Large Crop Expected to Reduce Spain Grain Import Needs

Country: Spain

Post: Madrid

Report Category: Grain and Feed

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Report Highlights:

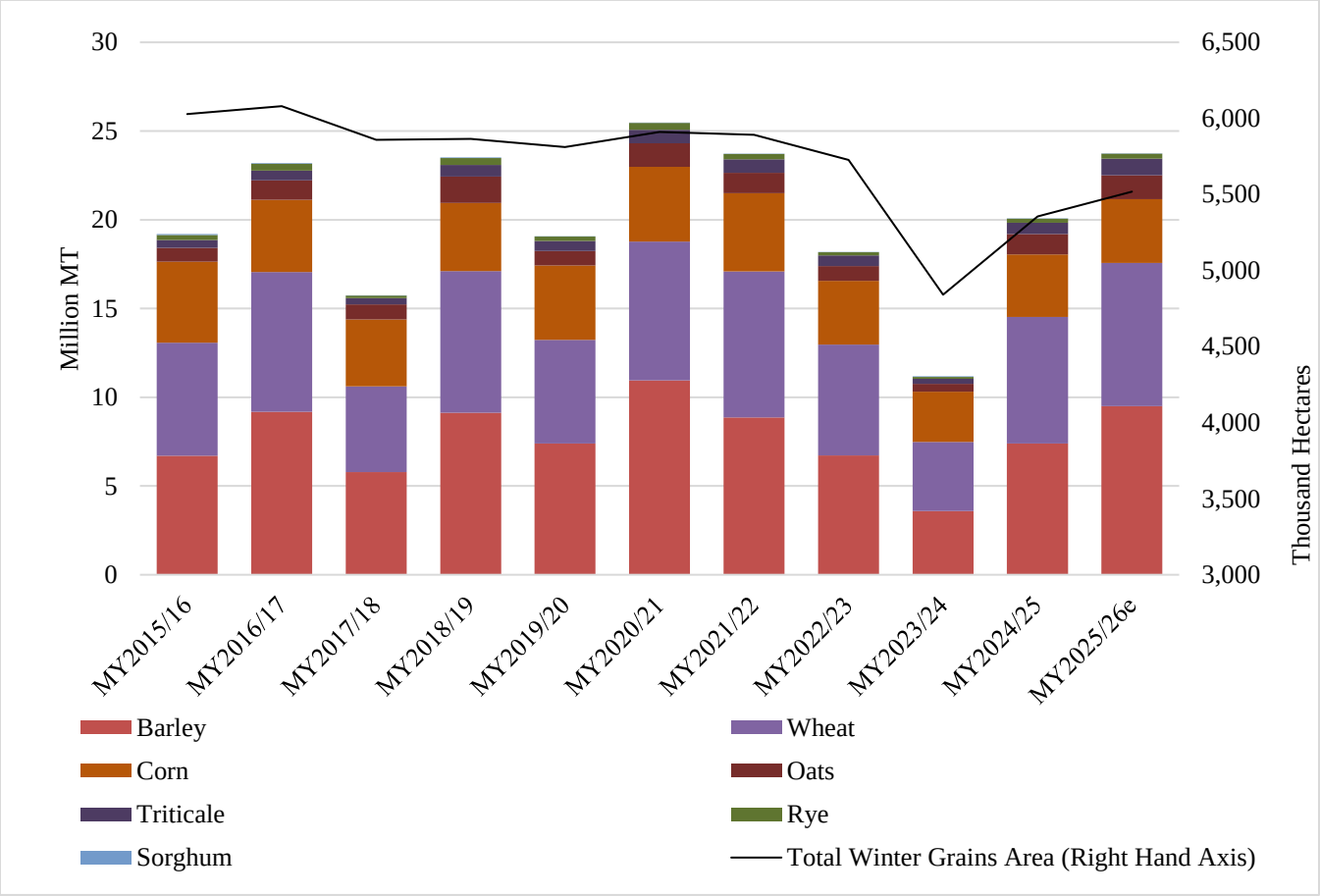
Abundant precipitation and mild temperatures prevailing since the beginning of March have favored winter grain crop development and increased yield expectations. Similarly, ample water supplies have allowed a recovery in corn area. However, high temperatures in the second half of May reduced yield expectations in some regions. Spain's total grain production is expected to exceed 24.1 million MT in MY 2025/26. Grain import demand is projected at 14 million MT- down from the over 16 million MT estimated for MY 2024/25.

Area

After years trending down, due to stiff competition for land from more profitable tree crops, official statistics reveal a recovery in area planted to grains in Spain for MY 2025/26.

An upward trend in grain prices in the Fall planting season, combined with comparatively lower input prices from the highs registered in 2022 and 2023, sent a signal for improved farmers' margins and contributed to a recovery in planted area for winter grains. The initially negative outlook on water availability at the beginning of the hydrological year led farmers in Spain to increase their more drought-resilient winter grains plantings at the expenses of spring planted crops. A larger area planted to corn is projected as the country's water reservoirs filled with late winter and spring precipitation, replacing sunflower or sugar beet planting in the southern and northern half of the country respectively.

Figure 1. Spain's Grain Area and Production



Source: MAPA. Avance de Superficies and FAS Madrid estimates.

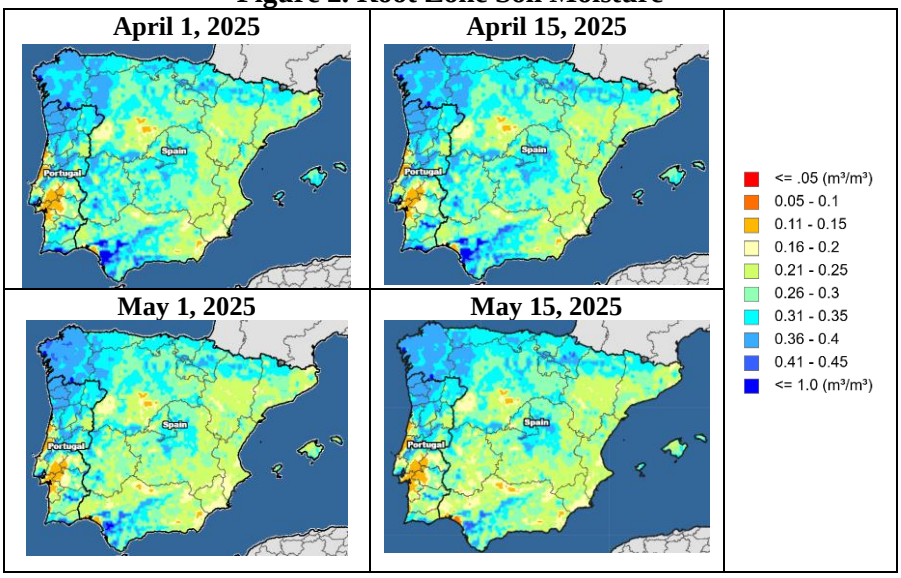
In Spain, early fall (October) precipitation caused delays in the harvest of summer crops such as corn and sunflower. In some grain growing areas, particularly in the country's east, excessive soil moisture prevented farmers from entering their fields, hence delaying winter-grain planting operations. However, fall rains were ultimately beneficial for the initial development stages of winter grain plants. The absence of rain since mid-November, combined with above average temperatures, allowed farmers to catch up with planting operations and compensated for the initial delays.

The combination of mild fall and winter temperatures and relatively ample and long-awaited winter precipitation since late January contributed to a very favorable germination of winter crops across Spain, despite the initial delays caused by early fall precipitations in the country's east, and the drier conditions to the country's northwest.

Spring 2025 was marked by abundant rainfall from early March until the second half of May, which not only restored soil moisture across the country, but also significantly improved water storage levels and secured above average yields on rain-fed land. March and April registered below average temperatures, delaying winter grain development. However, the heat wave in the second half of May reduced winter grain yield expectations, particularly in Castile-La Mancha, where the behind-schedule crop struggled with the high temperatures.

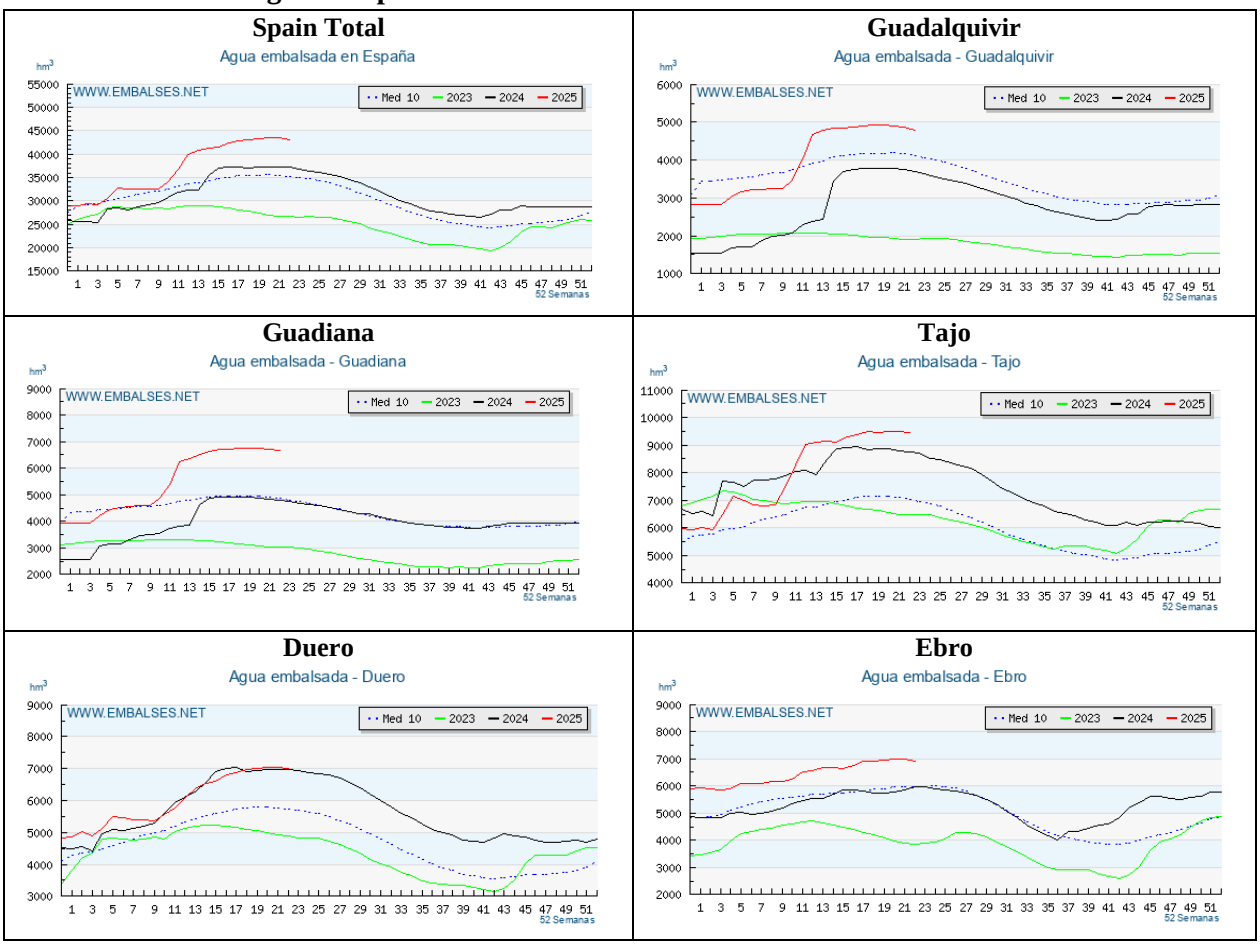
At the national level, water reserves are currently at 76.8 percent of total storage capacity. Irrigation water availability allows for a recovery of the area planted to corn. According to Post projections, Spain's grain corn plantings could potentially amount to nearly 320 thousand Hectares in MY 2025/26.

Figure 2. Root Zone Soil Moisture



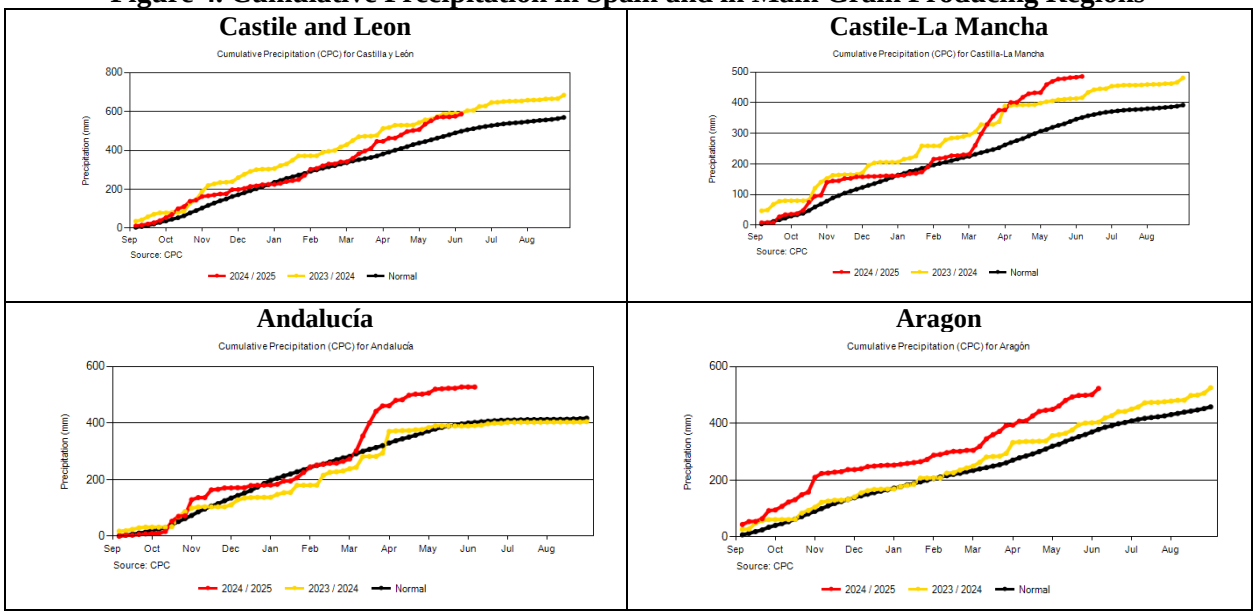
Source: IPAD/Foreign Agricultural Service/USDA.

Figure 3. Spain Total and River Basin Water Reservoir Levels



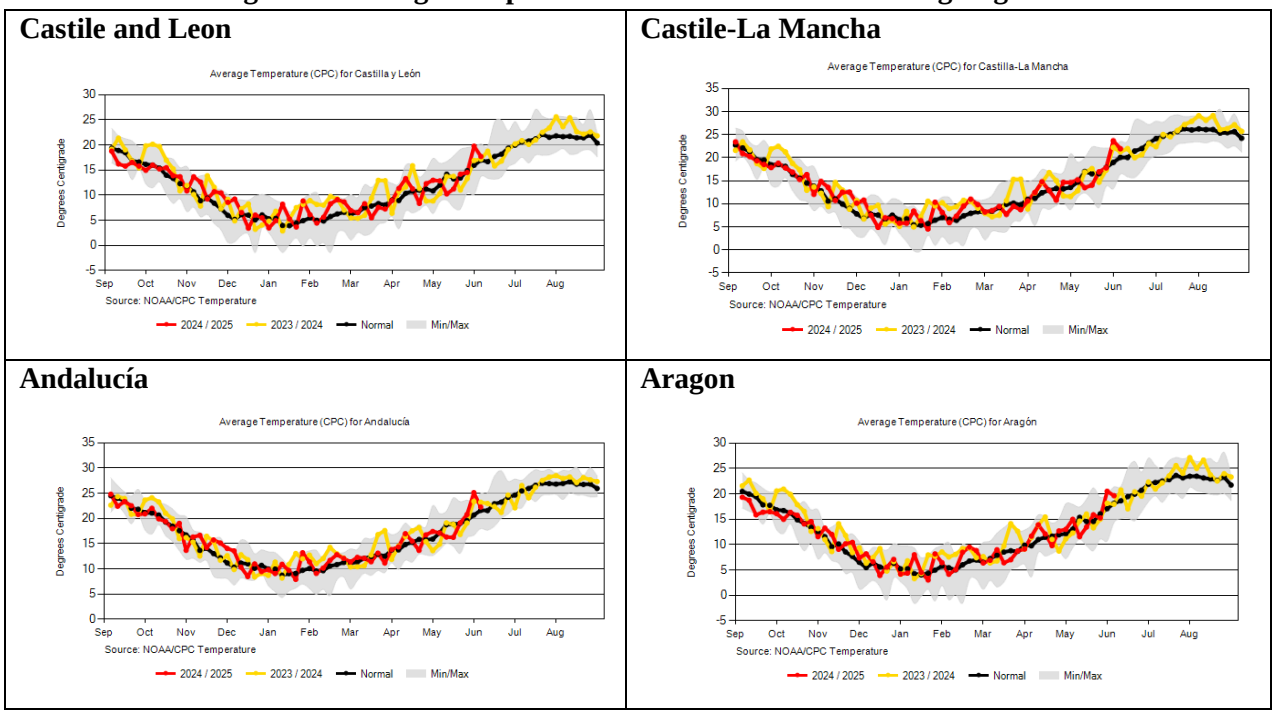
Source: Embalses.net.

Figure 4. Cumulative Precipitation in Spain and in Main Grain Producing Regions



Source: IPAD/Foreign Agricultural Service/USDA.

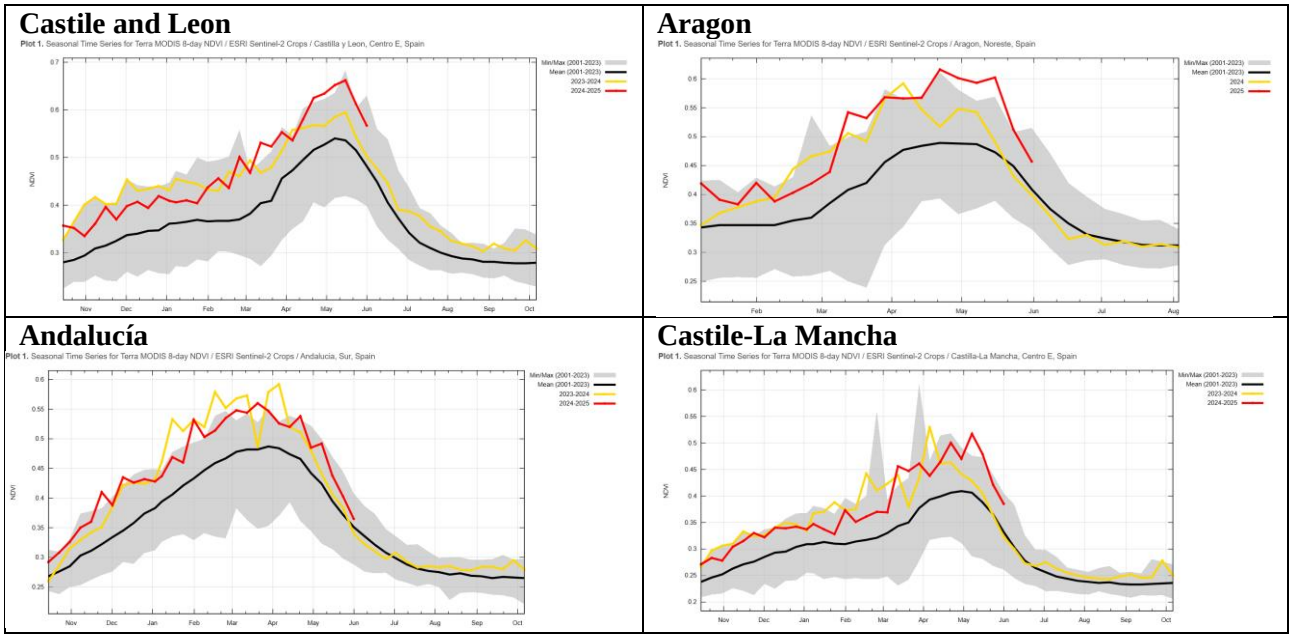
Figure 5. Average Temperatures in Main Grain Producing Regions



Source: IPAD/Foreign Agricultural Service/USDA.

The Crop Vegetation Health Index (VHI) in Spain's major grain producing regions was exceptional until mid-May. In some regions such as such as Castile and Leon and Aragon, it exceeded the largest VHI recorded within the 2001-2023 historical series.

Figure 6. Seasonal NVDI in Spain



Source: USDA/NASA GLAM.

Production

Post projects that production will be above last year's figure and above average levels across all growing regions. In the case of corn, virtually all is grown under irrigation, hence yields are very stable. Assuming average yields in a larger corn area, grain corn production could exceed 3.6 MMT, which would leave a total grain crop of over 24.1 MMT.

Table 1. Spain's Winter Grain Production Estimates (1,000 MT)

Crop	MAPA	Asegrain	EU Commission	ASAJA	Infomarket	ACCOE	COCERAL	Ag Coops	FAS Madrid
Date Released	March 2025	May 15, 2025	May 28, 2025	May 30, 2025	June 9, 2025	June 5, 2025	June 11, 2025	June 12, 2025	June 2025
Wheat	6,852	9,578	8,155	N/A	8,495	8,748	8,161	9,053	8,500
Soft	6,184	8,623	7,352	7,700	7,578	7,819	7,267	8,321	7,600
Durum	668	955	803	N/A	917	929	894	732	900
Barley	7,461	10,584	8,586	9,800	9,596	9,936	9,246	10,104	9,500
Oats	1,118	N/A	1,038	N/A	N/A	1,689	1,286	1,306	1,300
Rye	231	N/A	256	N/A	N/A	331	288	314	300
Triticale	675	N/A	738	N/A	N/A	981	744	906	900
Winter Grains	16,337	N/A	18,773	19,500	N/A	21,685	19,725	21,683	20,500
Corn	-	N/A	3,726	N/A	3,932	N/A	3,705	3,588	3,600
Total Grains	N/A	N/A	22,499	N/A	N/A	N/A	23,430	25,271	24,100

Sources: Provisional estimations by: MAPA (Spanish Ministry for Agriculture, Fisheries and Food), EU Commission, ASAJA (Young Farmers Union), Infomarket (Private Market Analyst), Asegrain (Private Market Analyst), ACCOE (National Grain Elevators), COCERAL, Agricultural Cooperatives, and FAS Madrid estimates.

While a sizeable grain crop is projected, the persistent rains during spring forced farmers to opt for lower yielding short-cycle spring grain varieties. The combination of abundant precipitation and high soil moisture prevented farmers from treating or fertilizing and triggered concerns about pest incidence and grains protein content in some instances. The excessive heat registered in late May is expected to lower yields for an otherwise record crop, particularly in Spain's central plateau.

Harvesting operations in Spain started with certain delays in late May in **Andalucía** and continue to move north. The Normalized Difference Vegetation Index (NDVI) for this region is exceptional, as it coincides and, in some instances exceeds, the largest NDVI recorded within the 2001-2023 historical series. Farmers report good yields and specific weights to the detriment of protein content. Some contacts in the field report adverse plant health effects caused by the excessive moisture. High temperatures registered in late May and early June came in too late to have a negative effect in this region's final output.

Similar to Andalucía, in **Aragon**, the high temperatures registered since the second half of May are not expected to have a major impact on yields. After obtaining relatively poorer results than the other main grain growing regions in MY 2024/25, Aragon is projected to witness a significant recovery in grain production in MY 2025/26, with NDVI levels exceeding the 2001-2023 historical reference. The combination of abundant precipitation and mild temperatures prevailing in spring are expected to result in a rebound of this region's winter grains output and area planted to corn.

In **Castile-La Mancha,** weather conditions, particularly timely early spring precipitation accompanied by mild temperatures, contributed to good, although delayed, winter grain crop development. In terms of NDVI, while very positive, it is somewhat below the outstanding development registered in the record setting MY 2020/21 (Crop year 2019/20) and declined sharply when the heat wave in late May hit the crop. High temperatures in late spring negated an otherwise excellent grain crop, particularly in the case of wheat.

Castile and León, Spain's largest grain-producing region, is a later-season cereal-producing area and largely oriented to barley production. In this region, above average yields can still be achieved given the combination of larger area planted to grains, irrigation water availability, and the fact that grain formation is still being completed.

Consumption and Trade

On the demand side, positive production margins in livestock sectors justify a steady demand in feed ingredients. The combination of an above average MY 2025/26 and somewhat expanding feed grains demand is expected to put Spain's total grain import needs at 14 MMT, down from the over 16 MMT of grain imports estimated for MY 2024/25.

Abbreviations used in this report

EU European Union
FAS Foreign Agricultural Service
IPAD International Production Assessment Division
Ha Hectares
MAPA: Ministry of Agriculture, Fisheries and Food
MY Marketing Year
MT Metric Ton (1,000 kg)
MMT Million Metric Tons
MY Marketing Year
MS EU Member State(s)
TMT Thousand Metric Tons

Attachments:

No Attachments.