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Report Highlights:

In MY 2025/26, EU grain total production is anticipated to revert to average levels and amount to 274 MMT. However, excessive soil moisture conditions in the EU's north and southwest and the drought conditions reported in the bloc's center and east have the potential to deteriorate initial estimates. The short MY 2024/25 crop in main grain exporting Member States reduced EU's grains presence in third country markets. In a context of steady EU animal feed demand, imports stayed at comparatively low levels given the ample domestic grain supplies in net grain importing Member States. The recent announcements to postpone bilateral retaliatory measures have restored predictability for now in the EU's grain market.

Disclaimer: This report presents the first 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

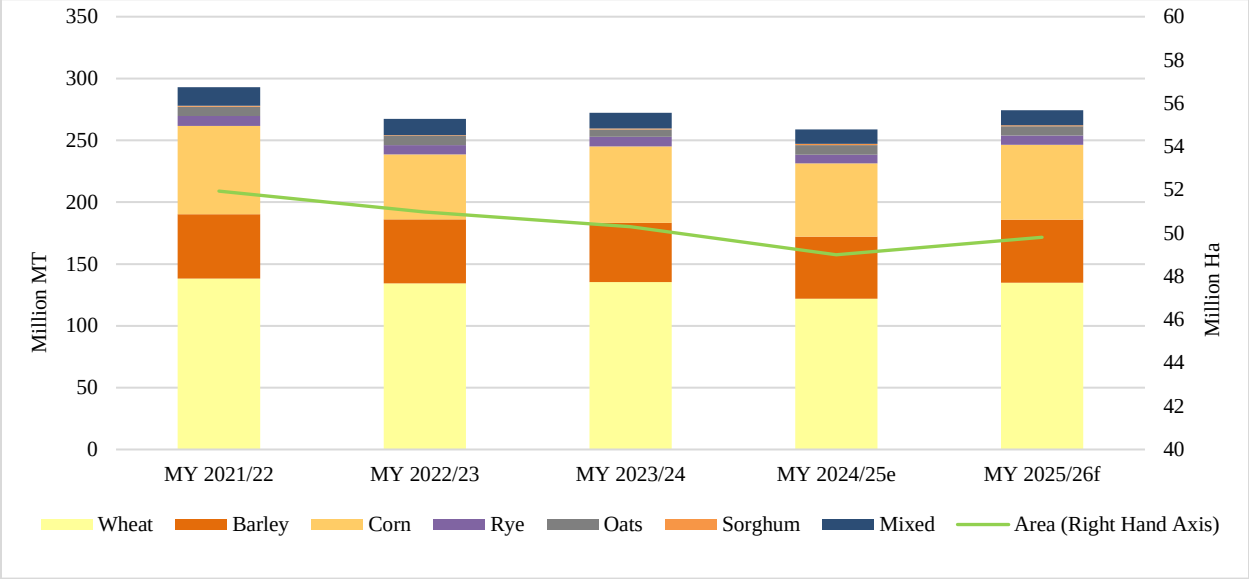
Table 1. Production, Supply and Distribution - Total Grains[1]

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

Total Grains	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	50,294	49,032	48,998		49,808
Beginning Stocks (1000 MT)	32,799	32,799	31,019	30,917		27,651
Production (1000 MT)	272,414	272,333	258,199	258,798		274,470
MY Imports (1000 MT)	34,762	34,736	32,245	31,340		30,705
TY Imports (1000 MT)	34,390	34,363	32,250	31,275		30,685
TY Imp. from U.S. (1000 MT)	1,676	1,353				
Total Supply (1000 MT)	339,975	339,868	321,463	321,055		332,826
MY Exports (1000 MT)	49,491	49,521	35,255	34,296		43,956
TY Exports (1000 MT)	49,399	49,430	35,480	34,400		43,945
Feed and Residual (1000 MT)	156,980	158,124	158,060	158,430		158,999
FSI Consumption (1000 MT)	102,485	101,306	102,855	100,678		101,150
Total Consumption (1000 MT)	259,465	259,430	260,915	259,108		260,149
Ending Stocks (1000 MT)	31,019	30,917	25,293	27,651		28,721
Total Distribution (1000 MT)	339,975	339,868	321,463	321,055		332,826

Source: FAS EU Posts.

Figure 1. EU Grain Area and Production



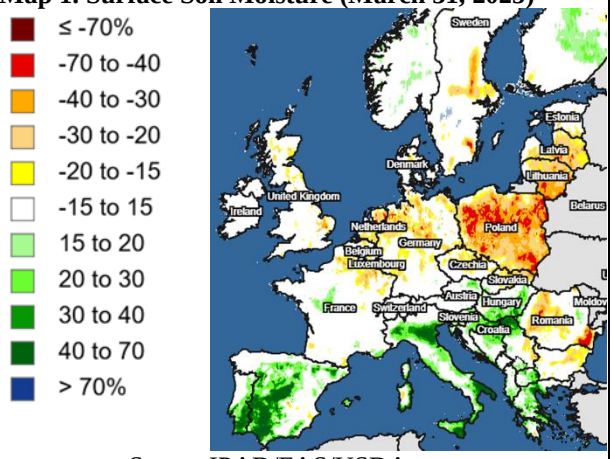
Source: FAS EU Post estimates based on Member State statistical sources.

Early estimates indicate that EU farmers may have increased their MY 2025/26 grain plantings, which are estimated to amount to 49.8 million Hectares (Ha), up from the 49.0 million registered in MY 2024/25. The flexibilization of crop rotation and crop diversification requirements introduced[2] in the Common Agricultural Policy (CAP) in MY 2025/26 has allowed farmers to allocate more area planted to their main grain crop. Moreover, EU farmers are increasingly opting to maximize winter crops area since the weather risks are comparatively lower compared to spring crops.[3] This is particularly true in central and southeast EU Member States such as Hungary, Bulgaria, and Romania, where corn yields were significantly hit by the summer drought in MY 2024/25. In Germany and France, in contrast to the difficulties faced in MY 2024/25, the improved conditions during planting season have allowed farmers to carry out their winter sowings uneventfully. In Spain, after years of trending down, due to stiff competition for land from more profitable tree crops, first official statistics reveal a recovery in planted area to winter grains for MY 2025/26.

Total grain production in the EU in MY 2025/26 is currently forecasted at 274.5 million MT, a significant recovery from the 258.8 million estimated for MY 2024/25. Winter grains development to the time of writing has been positive across the EU. Soil moisture was adequate for planting, and mild winter temperatures prevailed resulting in negligible winterkill impact across the EU. However, the combination of excessive moisture in the EU's southwest and the drought conditions in the EU's center and east are starting to raise concerns regarding winter grains performance.

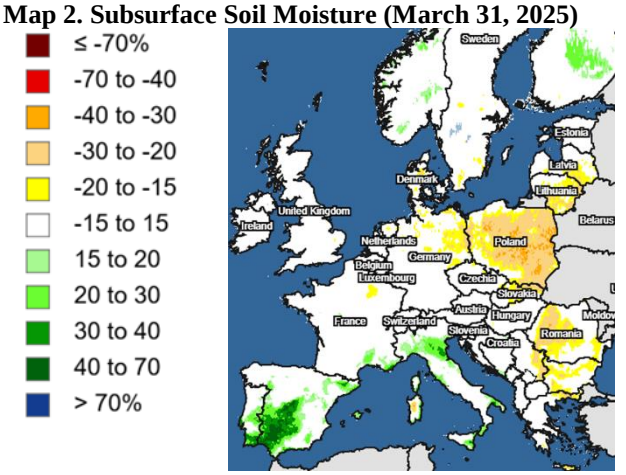
[2] According to Regulation (EU) 1468/2024. For additional information see Section IV Policy.
[3] Information regarding crop calendars for EU Grain and Oilseeds production can be found in the link.

Map 1. Surface Soil Moisture (March 31, 2025)



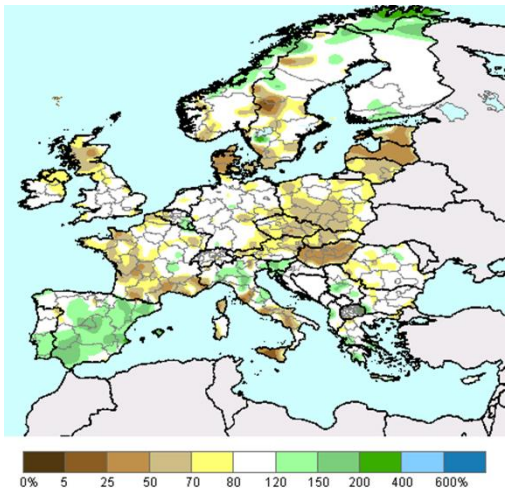
Source IPAD/FAS/USDA.

Map 2. Subsurface Soil Moisture (March 31, 2025)



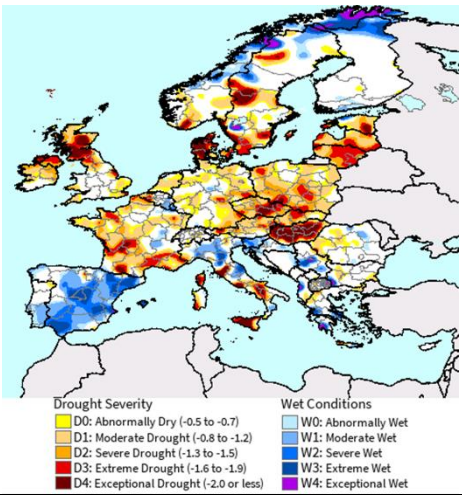
Source IPAD/FAS/USDA.

Map 3. Percent of Normal Precipitation (October 1, 2024 - March 31, 2025)



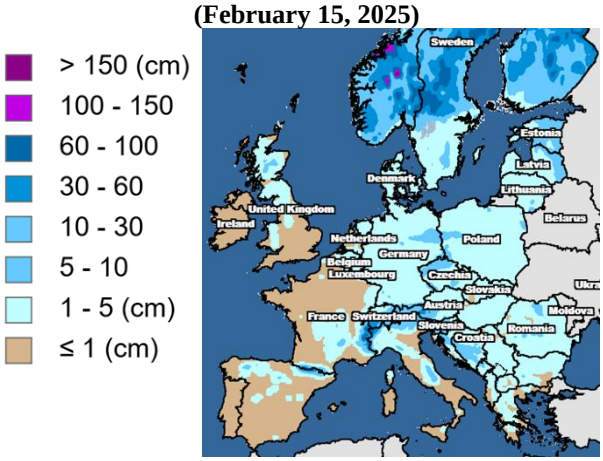
Source IPAD/FAS/USDA.

Map 4. Drought Severity (October 1, 2024 - March 31, 2025)



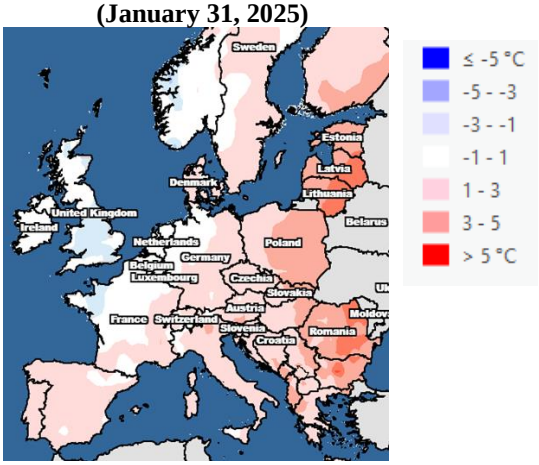
Source IPAD/FAS/USDA.

Map 5. Snow Cover (February 15, 2025)



Source IPAD/FAS/USDA.

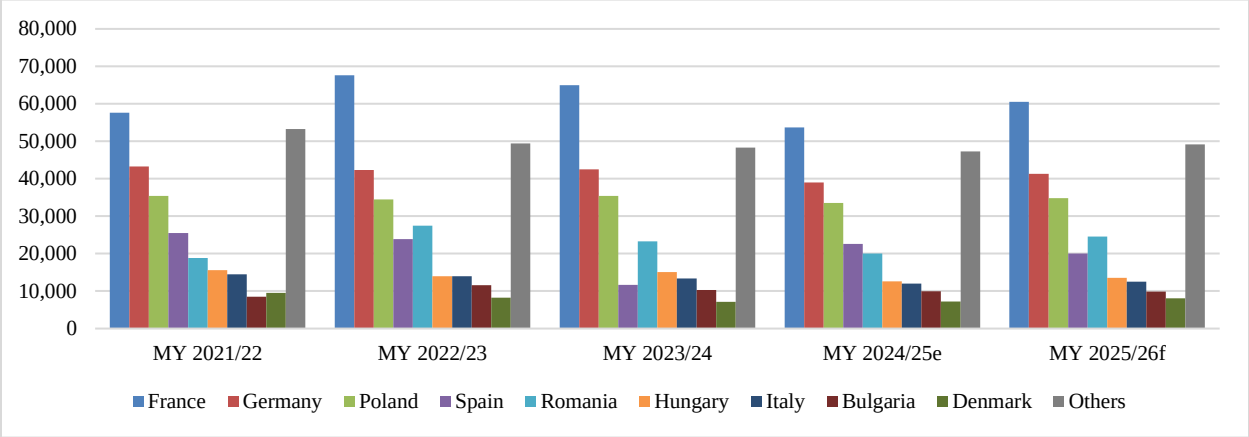
Map 6. Departure from Normal Temperature (January 31, 2025)



Source IPAD/FAS/USDA.

EU Member States Grain Crop Situation Outlook

Figure 2. Grain Production by EU Member State



Source: FAS EU Posts.

Similarly to MY 2024/25, MY 2025/26 in France started off impacted by excessive rains since fall 2024. The soil moisture negatively impacted root growth in winter grains, particularly in the center of the country and the northeastern grain growing regions. This damage has the potential to negatively impact yield prospects. A significant amount of the area planted to wheat in those regions may have to be tilled over and planted to spring crops such as corn or sunflower. The winter grains crop condition is somewhat better than last year's but below the five-year average. Grain crops have developed behind schedule. However, the favorable weather conditions have prevailed in the main grain growing areas since early March 2025, which has allowed farmers to plant spring grains under ideal conditions and apply fertilization and pesticide treatments as needed.

Crop conditions for plantings of winter grains in Germany were favorable, except for the delays caused by the late harvest of potatoes and sugar beets. Germination and early plant development were generally good. While winterkill was not a problem, the effects of the cold spell in mid-February have not been fully assessed.

The initially dry soil conditions registered in Poland in the first half of September were negated by the heavy rains in the second half of the month, particularly in the country's southwest, where devastating floods occurred. Favorable conditions for elsewhere allowed timely winter grain plantings to be completed by the end of October. Temperatures in November supported vegetation and created good conditions for the emergence, growth, and development of all winter crops. Winter crops entered winter dormancy in very good condition and no winterkills were reported after winter. Crop condition to date is assessed as good.

Sowing of winter crops in Hungary was initially hampered by heavy rainfalls and mud, but the dry weather and abundant soil moisture created favorable conditions again for sowing and early development from the second half of October. Nevertheless, the upper soil layer dried out in November, and grains faced difficulties in germination and uneven initial development. No frost damage is reported

to date given the mild winter temperatures. However, the limited precipitations are starting to raise concerns over yields potential.

In Czechia and Slovakia, winter crops were negatively affected by the excess rainfall in fall. Plantings were delayed and crops removed from the fields. Conversely, the sub superficial soil moisture is now depleted, and crops already show drought impact, which is particularly pronounced on the southern slopes. Winter temperatures were mild, and snow precipitation was limited, with almost no rain in February and March. The current significant moisture deficit may affect the growth of winter crops and the establishment of the new crop in spring.

After heavy rainfalls in September 2024, fall and winter in Austria were very dry, especially in the eastern and southern regions, where most of crop production takes place. While summer crops harvest was delayed due to wet conditions, the dry conditions later negatively impacted germination of late sown winter crops. Overall, temperatures have not been low enough to significantly reduce pest pressure. While no winterkill has been reported, the cold-spell registered in mid-February may have a somewhat negative impact in the absence of snow cover. Grain growing regions in Austria need more water for good crop development.

In northern Italy, the conditions have been favorable for winter crops, with mild temperatures and normal precipitation, which has contributed to good growth of crops such as wheat and barley. In Southern Italy, including Sardinia and Sicily, the warm and rainy climate has positively contributed to the development of winter crops, such as durum wheat, although the humidity and higher temperatures may have affected plant hardening and management.

A combination of larger area and improved yields is expected to result in a large grain output in MY 2025/26 in Croatia. In Greece, the larger output is entirely attributed to the improved yields anticipated after the previous drought-hit season.

In Spain, early fall October precipitations caused delays in harvest of summer crops such as corn and sunflower. The excessive soil moisture preempted some farmers, particularly in the country’s east, from entering their fields, which delayed winter-grains planting operations. However, fall rains were ultimately beneficial for the initial development stages. The absence of rains since mid-November combined with above average temperatures allowed farmers to catch up with planting operations and compensate for the initial delays. The ample precipitation levels in the month of March significantly improved soil moisture and irrigation water availability. If mild temperatures prevail until the end of the winter crop vegetative cycle, Spain output levels could exceed the current already over-average yields expectations.

In Romania, rains in mid-September partially alleviated soil dryness, allowing farmers to prepare their fields and proceed with sowing the winter grains. Fall precipitations were abundant. Winter temperatures and snow cover favored plants dormancy and provided protection against frost respectively. Some of the south-eastern areas, traditionally dry, witnessed very good rainfall levels, contributing to plant development and improving yield prospects for this major agricultural region.

Fall weather was mixed but generally favorable for the development of the winter grains in Bulgaria, except for the country's northeast, where precipitation is needed to improve soil moisture. Grain yield potential is highly dependent on fertilizer and other input applications, which may be challenging considering recent price increases.

Grain yields in MY 2025/26 are expected to exceed previous season levels in Denmark, Sweden, the Netherlands, and Belgium. Conversely, in Finland, grain yields are expected to revert to average after the good output registered in the previous season.

MY 2025/26 EU Grain Demand Holds Steady

Post forecasts the EU's total grain consumption for MY 2025/26 at 260 MMT, up from the 259 MMT estimated in MY 2024/25. Feed demand is the main driver and is expected to expand by one MMT year-on-year and amount to 159 MMT in MY 2025/26. The steady demand from EU chicken meat production to supply the increasing preference for poultry meat, particularly by the thriving tourism and Hotel, Restaurant, and Institutional (HRI) activity is seen as the leading reason for this increase, despite a declining, or at most stagnant, cattle and swine feed demand.[4]

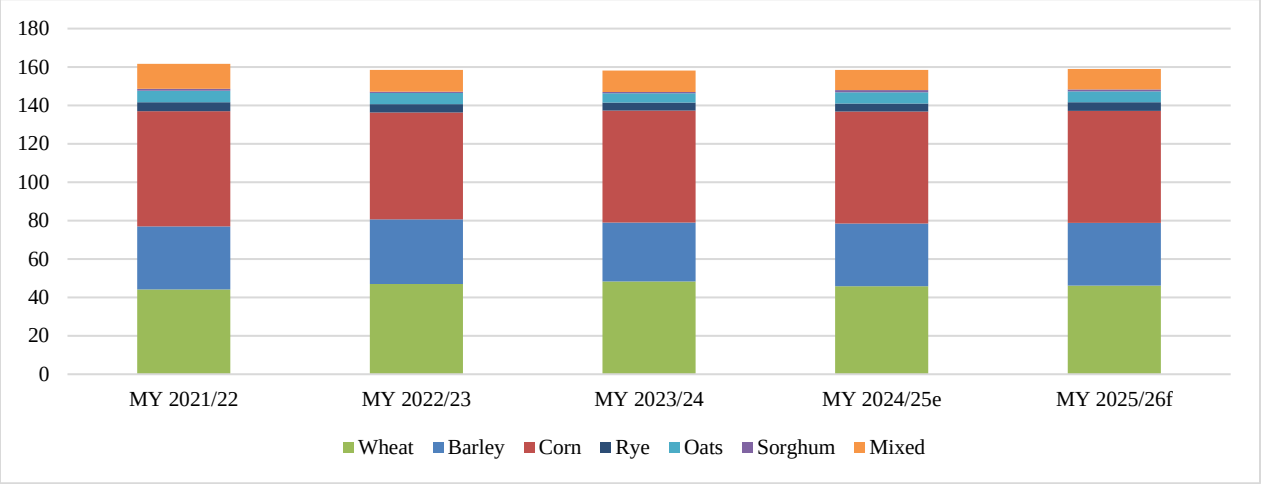
In MY 2025/26, domestically available grains are expected to increase their share in feed comparatively more than protein meals. Even though a recovery in feed wheat consumption is projected in MY 2025/26, provided a return to average crop size materializes, corn is expected to remain the preferred feed grain in the EU. Regulatory hurdles, including the EU's Deforestation Regulation (EUDR) implementation on December 31, 2025, have the potential to favor grain use in the feed mix. Feed corn in MY 2024/25 is expected to be used at a high level in combination with readily available soybean meal. High prices of fat for animal feed benefit corn, which has higher energy content compared to other grains.

Food, Seed, and Industrial (FSI) uses in MY 2025/26 are expected to exceed MY 2024/25 levels only marginally. The increase can be entirely attributed to the increased industrial uses. The largest, albeit still small, increases in industrial use are reported in Germany, where a higher biofuel mandate[5] and greater use of grains for biomethane production drive the increase in use. In Romania and Hungary, increased installed capacity and capacity use respectively drive expansion of industrial uses. In Italy, the malting industry expansion provides additional opportunities for barley in human consumption.

[4] Additional information regarding animal sector trends can be consulted in the most recent in the most recent Poultry and EU Livestock GAIN reports.

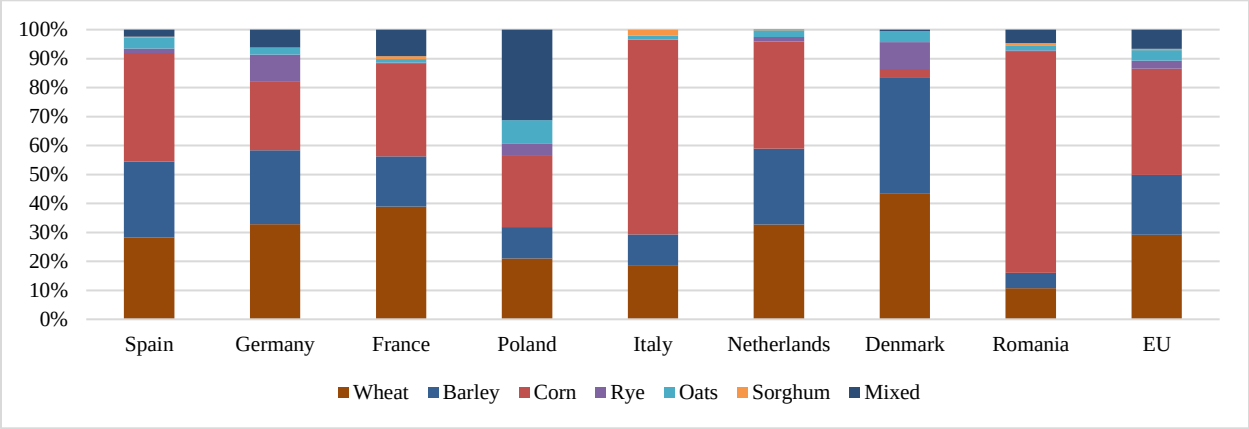
[5] Additional information regarding EU's Bioethanol Sector is available in the latest EU Biofuels Report and in the latest Biofuel Mandates in the EU by Member State.

Figure 3. Feed Use by Type of Grain in the EU (MMT)



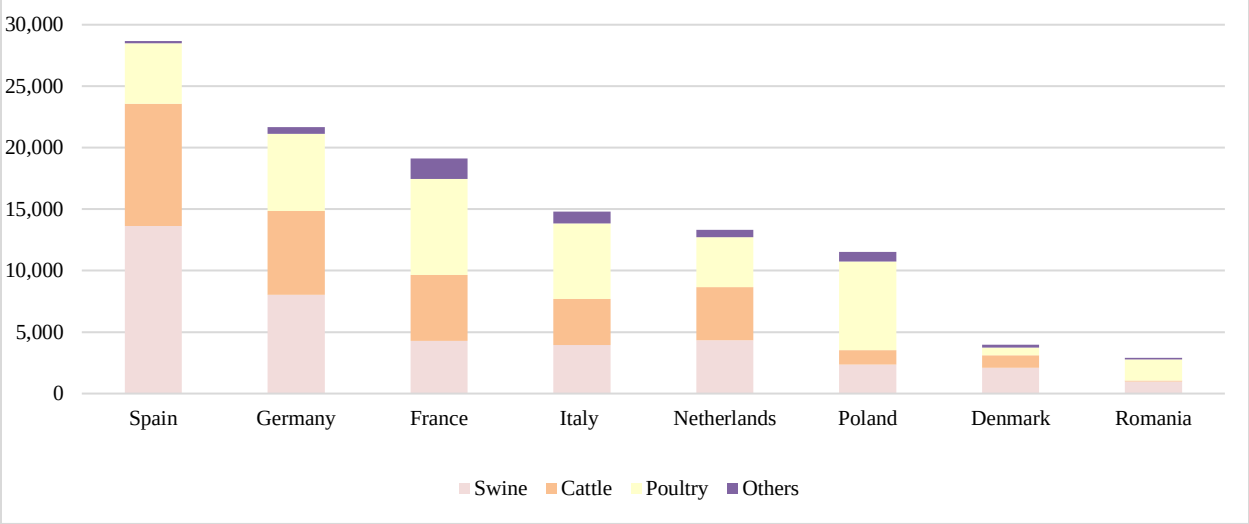
Source: FAS EU Posts estimates.

Figure 4. Preferred Feed Grain in the EU's Largest Feed Markets - MY 2025/26 Forecast



Source: FAS EU Posts estimates.

Figure 5. Industrial Compound Feed in EU Main Producing Member States by Type - 2023



Source: FAS EU based on FEFAC data.

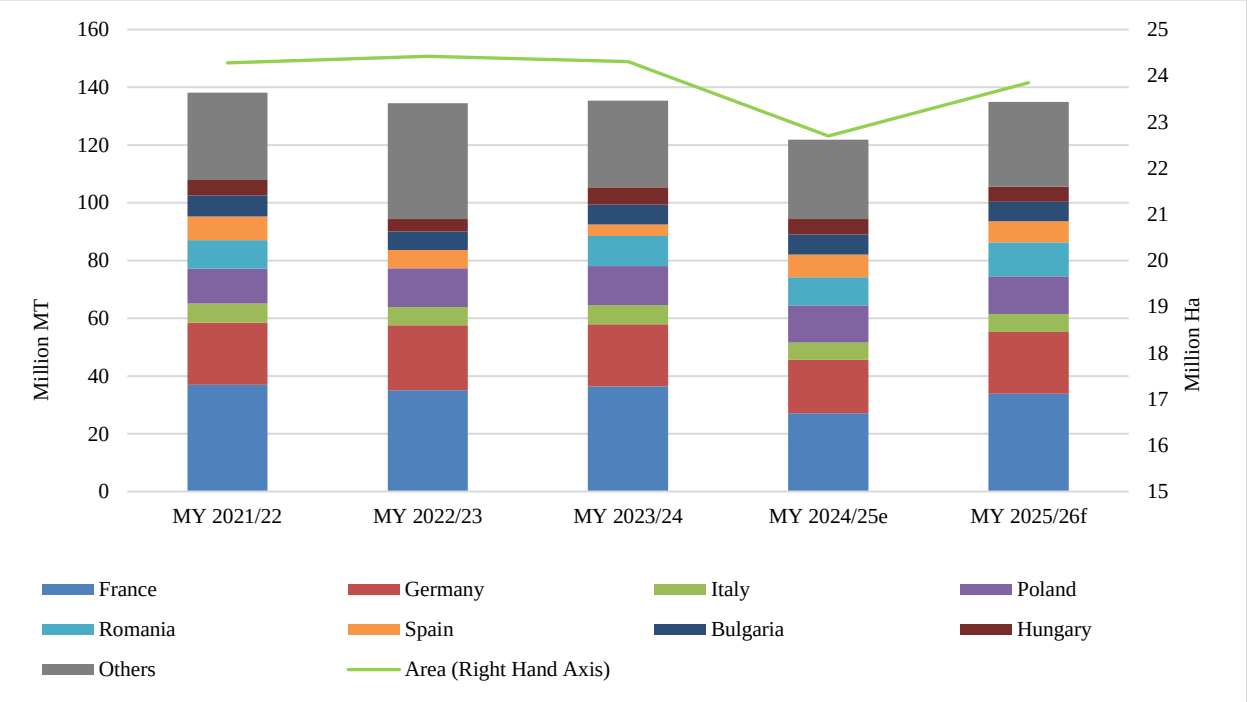
Section I. Wheat

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	24,306	22,701	22,700		23,850
Beginning Stocks (1000 MT)	16,268	16,268	15,821	15,397		13,027
Production (1000 MT)	135,375	135,335	121,023	121,830		134,900
MY Imports (1000 MT)	12,652	12,658	10,700	10,000		9,200
TY Imports (1000 MT)	12,652	12,658	10,700	10,000		9,200
TY Imp. from U.S. (1000 MT)	343	343				
Total Supply (1000 MT)	164,295	164,261	147,544	147,227		157,127
MY Exports (1000 MT)	37,974	38,004	26,500	26,000		34,000
TY Exports (1000 MT)	37,974	38,004	26,500	26,000		34,000
Feed and Residual (1000 MT)	46,500	48,300	45,500	45,900		46,200
FSI Consumption (1000 MT)	64,000	62,560	64,250	62,300		62,400
Total Consumption (1000 MT)	110,500	110,860	109,750	108,200		108,600
Ending Stocks (1000 MT)	15,821	15,397	11,294	13,027		14,527
Total Distribution (1000 MT)	164,295	164,261	147,544	147,227		157,127
Yield (MT/HA)	5.5664	5.5680	5.3312	5.3670		5.6562
(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.

Figure 6. EU Wheat Area and Production



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

EU wheat area is expected to rebound in MY 2025/26 from the very low level registered in MY 2024/25 and amount to 23.8 million Ha. Across the EU, but especially in France and Germany, farmers are anticipated to plant more wheat. The hike is partly driven by the flexibilization of CAP crop rotation requirements,[6] but also due to the better planting conditions, notably in central and eastern EU. In France, the area planted to wheat is now foreseen to increase driven by higher soft wheat planting, which more than offsets lower durum plantings. Note that a small amount of the area planted to wheat, probably several thousand hectares, may have to be tilled over and re-planted to spring crops due to excessive rainfall in winter. In Germany, farmers are also expected to have increased their wheat area as the planting conditions improved considerably over MY 2024/25. Hungary wheat area has expanded too, as farmers switched away from the less profitable rapeseed crop. In the case of Poland, the early harvest of MY 2024/25 corn allowed farmers to increase wheat plantings for MY 2025/26. Romanian and Bulgarian farmers planted more wheat as they feared that yet another dry and hot summer in 2025 could again hamper spring crops yields. Spanish farmers also planted more wheat, benefiting from favorable weather conditions and crop rotation flexibilization requirements.

After a disastrous MY 2024/25 wheat crop due to a combination of lower area, poor yields, and poor quality due to unfavorable weather conditions in many EU countries, the MY 2025/26 wheat crop is expected to bounce back to average and amount to 134.9 million MT. The larger projected production results from a combination of larger area and anticipated improved yields. Overall, by early spring 2025, wheat fields are mostly in good condition, with the notable exception of France, where both soft wheat and durum were impacted by excessive precipitation in winter 2025, even if the dry conditions that prevailed since early March 2025 are improving the prospect. The rains impacted root growth especially in the central and north-eastern regions of France. The weaker root system could negatively impact the yield prospect. According to Cere'Obs, the official French grain crop grading service, close to 74 percent of the wheat crop is in a good to very good condition in the first week of March 2025, compared to the less than 65 percent in the same week of MY 2024/25. However, the crop condition is significantly lower than the five-year average.

In Germany and Poland, where germination and early plant development were generally good, average yields are projected. Romanian wheat growers are also anticipating a recovery in yield as the wheat crop is currently in a very good situation. On the other hand, Hungarian wheat yields are expected down from the high level of MY 2024/25, as winter crops faced dryness during germination and plants' initial development was uneven.

[6] According to Regulation (EU) 1468/2024. For additional information see Section IV Policy.

Within FSI, both food and industrial wheat uses in the EU are expected to marginally increase in MY 2025/26. Wheat uses for biofuel purposes are anticipated to remain stable in MY 2025/26 as no new plants are scheduled to enter operations. Due to the shorter availability, FSI uses of wheat are expected to slightly decline in MY 2024/25, with the decline affecting mostly the starch industry while the milling uses keep rising slowly.

In the longer term, the EU milling industry is experiencing a significant consolidation, with medium-sized mills either being shut down or merged with larger mills belonging to industrial groups. Analysts note that milling capacity is generally underused. At the same time, in many EU countries, small scale mills are still providing high quality wheat flour to local bakeries for specialty breads. Overall, in the EU, basic bread consumption is gradually declining while the consumption of specialty and industrial products (including wholegrain products), pasta, snacks, cookies, and similar confectionary products using wheat flour is growing, supported by a decline in wheat prices since MY 2023/2024 that has eased the inflationary pressure on wheat-based food products.

EU feed use of wheat in MY 2025/26 is forecasted to rise slightly from the low MY 2024/25 level. However, in MY 2024/25 and despite the shorter availability, low wheat prices helped support the competitiveness of wheat in feed rations, raising feed uses from previously lower forecasts. The demand for wheat is also fueled by an increased EU poultry production, despite a declining, or at most stagnant, cattle and swine feed demand.[7]

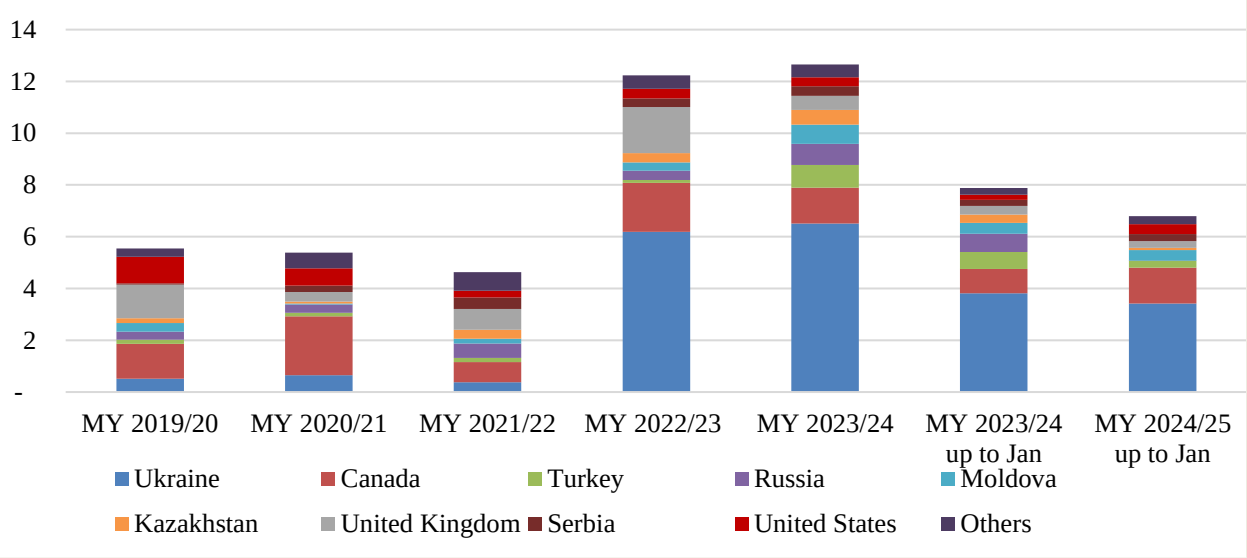
EU wheat imports in MY 2025/26 are likely to go down and amount to 9.2 MMT. Import demand from third countries in Spain, and to a smaller extent Italy, are projected to decline considering the anticipated improved EU output. U.S. wheat[8] is among the products targeted in the EU Commission's response to the reimposition of U.S. Section 232 tariffs on aluminum and steel. However, the EU's 25 percent retaliatory measures are now on hold until mid-July.[9] These actions, if finally enforced, combined with Chinese duties on U.S. wheat, would have the potential to reshape global wheat trade routes.

Available trade data and import licenses issued to date indicate that EU wheat imports in MY 2024/25 will decrease from the high import levels in MY 2023/24 of 12.7 MMT and amount to just 10 MMT. EU wheat imports are expected to decrease in MY 2024/25 as Spain, the largest EU grain import market, sees the domestic crop rebound from the low grain output level registered in MY 2023/24. Even if the price spread between wheat and corn continue to remain minimal, high fat prices and ample soybean meal supplies will push feed manufacturers to maximize corn in the feed formula at the expense of wheat.

[7] Additional information regarding animal sector trends can be consulted in the most recent in the most recent Poultry and EU Livestock GAIN reports.
[8] HS Code: 10011900, durum wheat (excl. seed for sowing).
[9] For additional information regarding potential EU import duties, consult Policy Section below. For additional information, please consult GAIN Report: Compendium of Chinese Tariffs on United States Agricultural and Related Products and China: SCTC Announces Retaliatory Tariffs on US Agricultural Products.

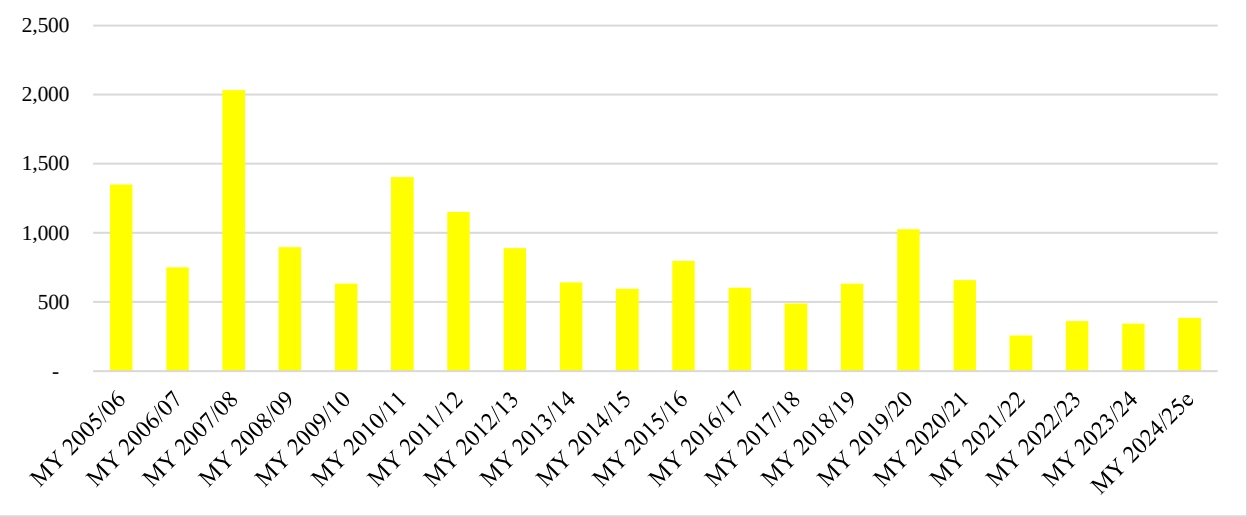
Main third country suppliers to the EU include Ukraine,[10] which accounts for a significant share of the bloc's wheats imports, followed by Canada. Canadian, and U.S. wheat to a lesser extent, have partially covered the gap left by the low availability of high protein wheat within the EU, especially with the lower quality French wheat crop. The EU has not imported any significant amount of Russian wheat in the first half of MY 2024/25.

Figure 7. Main Wheat Suppliers to the EU (1,000 MT)



Source: Trade Data Monitor, LLC.

Figure 8. EU Imports of U.S. Wheat (TMT)

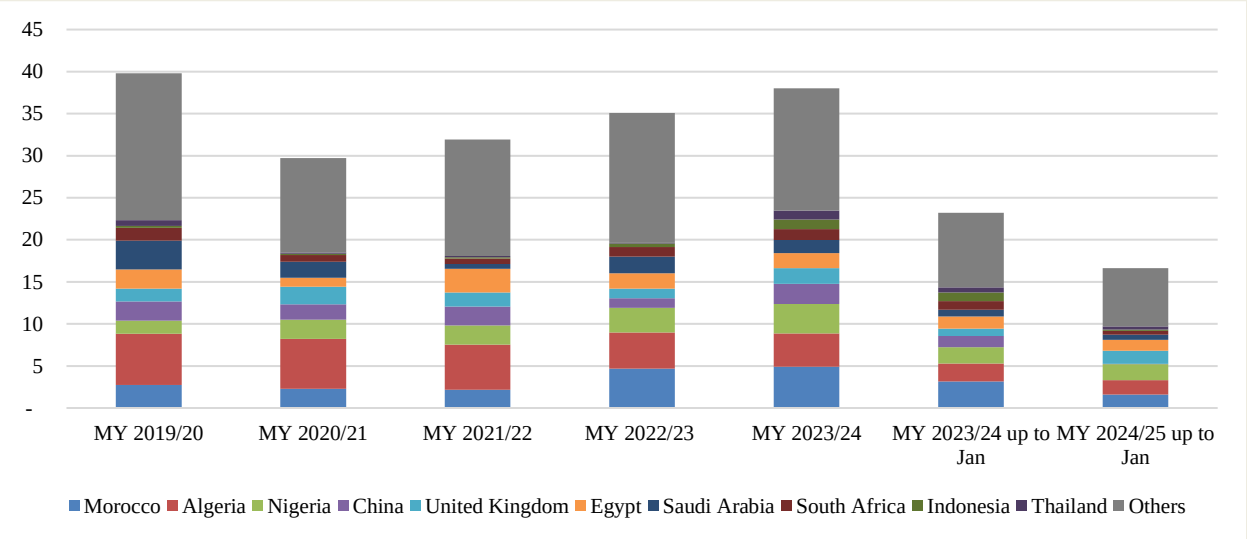


Source: Trade Data Monitor, LLC data.

[10] Note that wheat is not included in the EU import cap set by the March 2024 extension of the EU Autonomous Trade Measures (ATMs) with Ukraine. For additional information, consult Policy Section below.

EU wheat exports in MY 2025/26 are anticipated to recover from the very low MY 2024/25 levels. Main wheat-exporting EU Member States include France, Romania, Germany, Poland, Bulgaria, and the Baltic countries. In MY 2024/25, EU wheat exports are expected to stay at 26 MMT due to the short crop combined with poorer quality. France is expected to lose its rank as largest EU wheat exporter to Romania and Bulgaria. Even lower EU wheat prices in the last quarter of the MY 2024/25 are not expected to support EU wheat exports. Nigeria, Morocco, and the United Kingdom are expected to remain the EU's largest wheat customers in MY 2024/25. Algeria used to be a steady and large customer of French milling wheat, given its significant shipping cost advantage. However, in MY 2024/25 a combination of wheat quality issues and political disputes following France's recognition of Moroccan sovereignty over Western Sahara have resulted in the closure of the Algerian market to French wheat. Algeria is now increasingly buying price-competitive Bulgarian and Russian wheat. Since the United Kingdom also suffered from a poor domestic wheat crop, the country is likely to import close to 2 MT of EU wheat, mainly from Germany, but also from Italy, Denmark, and Poland. Egypt and Saudi Arabia are expected buy significant amounts of wheat from Romania and Bulgaria in MY 2024/25. Sub-Sahara countries such as Nigeria, Cote d'Ivoire, Cameroon, and South Africa will remain larger customers of EU wheat in MY 2024/25. For the second consecutive year, the United States is also a large importer of EU wheat and wheat products. On the other hand, China is anticipated to purchase a minimal amount of EU wheat in MY 2024/25 given the strong competition from Australia, Canada, Russia, Kazakhstan, and the United States[11], in the first five months of MY 2024/25.

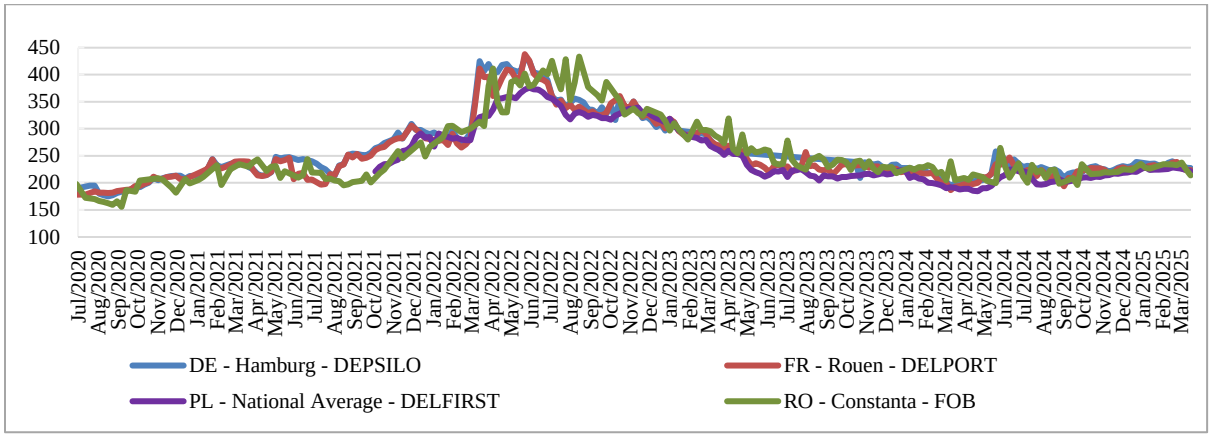
Figure 9. Main Wheat Destinations for EU Wheat (1,000 MT)



Source: Trade Data Monitor, LLC.

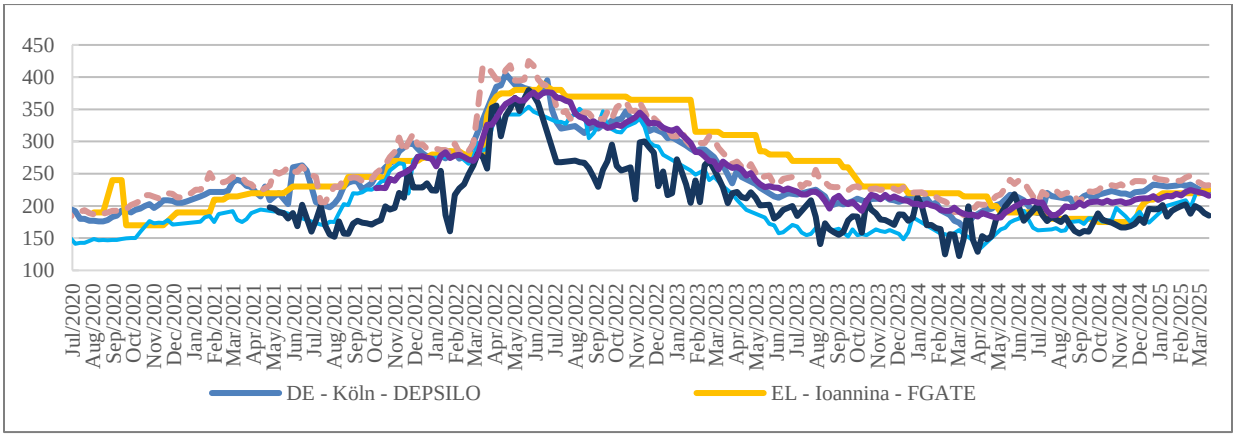
[11] For additional information regarding potential EU import duties, consult Policy Section below. For additional information, please consult GAIN Report: Compendium of Chinese Tariffs on United States Agricultural and Related Products and China: SCTC Announces Retaliatory Tariffs on US Agricultural Products.

Figure 10. EU Milling Wheat Prices (Euros/MT)



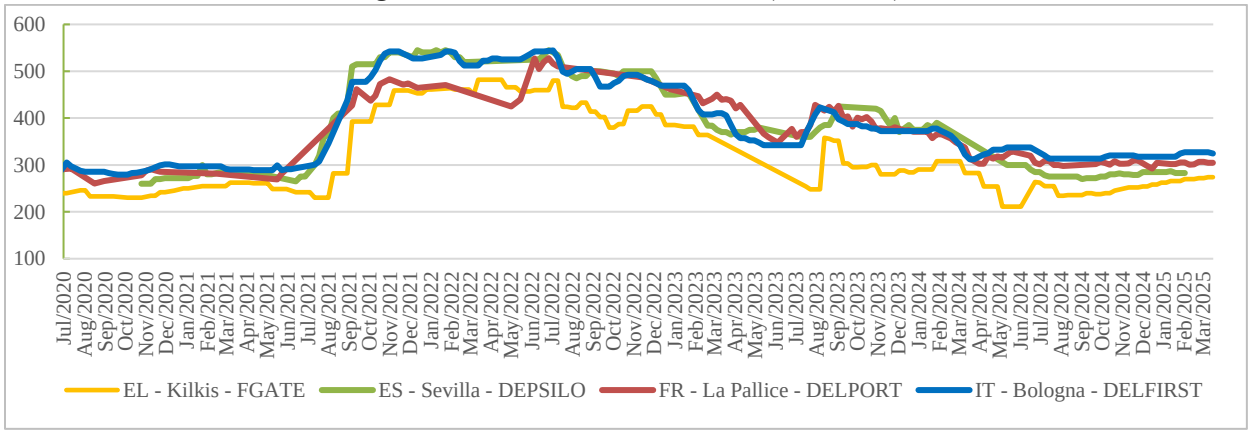
Source: EU Commission based on Member States notification according to Regulation (EU) 2017/1185.

Figure 11. EU Feed Wheat Prices (Euros/MT)



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

Figure 12. EU Durum Wheat Prices (Euros/MT)



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

The larger expected crop could help raise the ending stocks in MY 2025/26. Supported by tighter wheat supply, and despite lower exports, EU wheat ending stocks in MY 2024/25 are expected to decrease, particularly due to the significantly lower stocks in France.

Section II. Coarse Grains

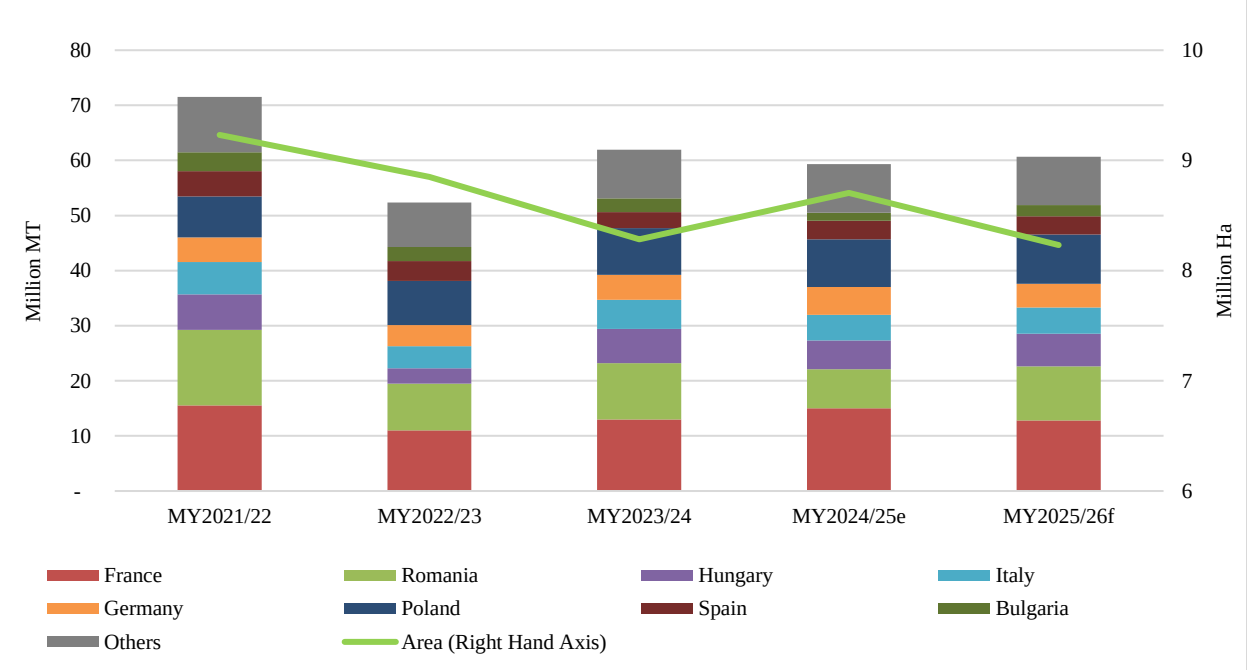
Corn

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	8,700		8,230
Beginning Stocks (1000 MT)	8,024	8,024	7,314	7,278		6,442
Production (1000 MT)	61,947	61,950	59,312	59,300		60,700
MY Imports (1000 MT)	19,832	19,833	20,000	20,100		20,300
TY Imports (1000 MT)	19,832	19,833	20,000	20,100		20,300
TY Imp. from U.S. (1000 MT)	1,333	1,008				
Total Supply (1000 MT)	89,803	89,807	86,626	86,678		87,442
MY Exports (1000 MT)	4,389	4,389	2,500	2,300		3,000
TY Exports (1000 MT)	4,389	4,389	2,500	2,300		3,000
Feed and Residual (1000 MT)	58,300	58,300	57,700	58,200		58,300
FSI Consumption (1000 MT)	19,800	19,840	19,700	19,736		20,060
Total Consumption (1000 MT)	78,100	78,140	77,400	77,936		78,360
Ending Stocks (1000 MT)	7,314	7,278	6,726	6,442		6,082
Total Distribution (1000 MT)	89,803	89,807	86,626	86,678		87,442
Yield (MT/HA)	7.4788	7.4792	6.8143	6.8161		7.3755
(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.

Figure 13. EU Corn Area and Production



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

EU corn area is projected to decline in MY 2025/26 compared to MY 2024/25 and amount to just above 8.2 million Ha. With very few exceptions, most EU corn-producing Member States expect a drop in corn area. This is largely due to the lower planting area available for spring crops, as strong concerns over heatwaves and drought-induced crop damage in corn drive farmers' decisions, leading them to opt for more resilient winter grain plantings.

In Germany and France, winter crops planted area are anticipated to return to the earlier higher levels, trimming the area available for corn, despite the relatively good yields witnessed in the previous season in the latter. A large decline is projected in Romania,[12] where interest in corn is fading because of the consecutive past three years with summer heat and droughts. For similar reasons, in Bulgaria and Hungary, farmers are losing their trust in the corn crop. Conversely, area is predicted to expand in Poland and Austria, as corn is a substitute for sugar beet, for which contracted area with sugar processing plants is shrinking. Similarly, a potentially larger corn planted area is projected in Spain, as the country's water reservoirs are being refilled, allowing for larger surface to be irrigated, combined with CAP crop rotation and flexibility in diversification requirements. Italy's corn area is forecast to increase slightly, particularly in Veneto, Emilia-Romagna, and Friuli-Venezia Giulia regions, driven by the lower profitability of alternative crops such as wheat and soy, as well as favorable weather conditions. Other Member States report small area variations, either upward as in the case of Austria, Croatia, Lithuania, Portugal, Slovenia, or downward in Belgium, Czechia, Denmark and Slovakia.

In MY 2025/26, despite the lower planted area in the core corn-growing Member States, production is expected to recover marginally and amount to 60.7 million MT, under the assumption of improved yields. Romania is expected to have the largest production rebound driven by improved yields, compared to the bottom levels registered in the previous drought-hit season. For the same reason, Hungary and Bulgaria foresee significant production boosts. However, corn yields are dependent on the weather conditions at the sowing time and the success of corn flowering phase in the summer. Small increases are also expected in Poland, Italy, Austria, Greece, Portugal, and Spain. Conversely, France and Germany are anticipated to harvest a lower production, as the exceptional yields registered in MY 2024/25 are not expected to be repeated.

Abundant rainfall in the fall and winter replenished the soil moisture and the underground water reservoirs across the EU, providing farmers a level of confidence in plant germination and emergence. Conversely, the current rainfall deficit has started raising concerns in certain regions in Romania, Bulgaria and Hungary, but also in Germany and Czechia.

An early start of the planting operations may prove beneficial to ensuring a successful pollination before the arrival of the high temperatures, particularly in Romania and Bulgaria, where a large share of the EU's corn crop is concentrated, and where summer heat and severe lack of moisture drastically trimmed the yields in the recent seasons. The precipitation level in the past two months was adequate or in a

[12]Additionally, the recent court decision to cancel the emergency authorizations for neonicotinoids in Romania may play a role in the planting decisions. For additional information consult Policy Section below.

surplus in Member States such as France and Spain, where corn plantings may witness delays resulting from the abundant precipitations throughout March.

Biotech corn cultivation is limited to Spain and Portugal. In other Member States, such as Romania, that did not opt-out from genetically engineered (GE) crops cultivation, the rigorous traceability requirements and difficulties in marketing crops discourage farmers from cultivating GE.

Production figure for MY 2024/25 has been revised up based on higher than previously estimated volumes reported in Poland, France, Germany, and Croatia mainly, which outweighed declines reported by other Member States, such as Romania and Bulgaria.

EU's total corn consumption is forecast to grow slightly and exceed 78 MMT in MY 2025/26, driven by a rise in feed and industrial uses. Industrial use increase is driven by prospects for a larger demand for starch, supported by expanded starch production capacities in Romania and Hungary. Conversely, a lower domestic supply in MY 2024/25, in both volume and quality terms, is foreseen to result in year-on-year contraction in total corn consumption. Industrial corn utilization is nearly unchanged as estimates for starch expansion capacity in Romania are nulled by declines expected in Germany and Hungary.

Feed utilization is foreseen to grow in MY 2025/26 under the assumption that the ample global supply will preserve corn price competitiveness against alternative grains. The elevated feed demand is driven by a larger crop projected in some Member States, such as Romania, and by potential for livestock products export demand in others, such as Spain. The higher corn utilization reported by Spain, Romania, Hungary, and Ireland offset the reduced incorporation anticipated in Germany, Portugal, France, the Netherlands and Denmark, where a stagnant livestock inventory in tandem with a higher availability of other feed grains may limit corn feed utilization. Belgium, Croatia, Czechia, Poland, and the Baltic Countries project no year-on-year changes in corn feed consumption. In MY 2024/25, corn is currently the most competitive option in tandem with soybean meal in feed ratios in several Member States. However, despite the preference for corn as compared to other grains, the feed use is anticipated to marginally decrease in the current season, given the alternative feed grains supplies readily available domestically. A lower feed utilization than the previous season in Spain, Romania, France, Italy, and Bulgaria, given the ample feed quality wheat domestically available, is expected to offset the growth reported by Germany, the Netherlands, Ireland, Poland, and Hungary.

MY 2025/26 imports are predicted to marginally rise in response to a lower-than-average domestic corn availability, despite the relative recovery in production projected. The large livestock producers and corn-deficient Member States will continue to have an interest in imports to cover their deficits, such as Spain, the Netherlands, Italy, Portugal, Ireland, Germany, and Belgium. Although imports into Slovenia remain at a high level, they are likely associated with transitory shipments. Ukraine is expected to remain the EU's largest source of corn. Imports from this origin will depend on the future EU trading regime - to be renewed in June 2025[13] - and the market opportunities offered by other export

[13] For additional details please consult Policy Section below.

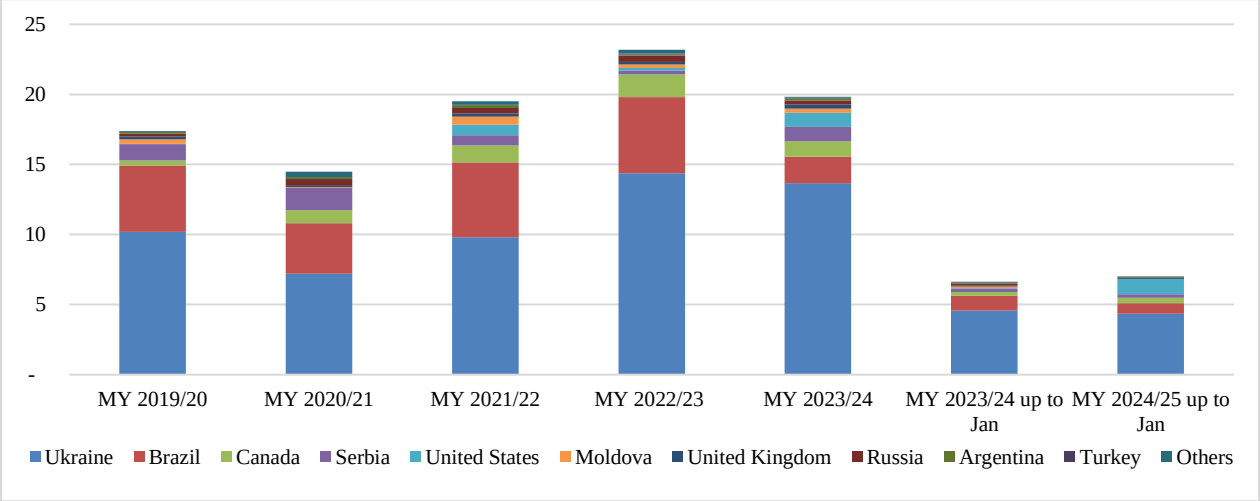
destinations, such as China. Brazil is envisaged to maintain a leading position on the EU market, particularly upon the availability of the crop in the last quarter of the season, before the EU corn crop is harvested.

If materialized, the preference for corn against soy in the planting intentions in the United States[14] may result in an abundant supply that may retain U.S. corn competitiveness on the EU market. However, U.S. corn[15] is among the products included in Regulation (EU) 2018/886 as amended by Regulation (EU) 664/2025. The proposed 25 percent EU retaliatory tariffs on U.S. corn are now on hold until mid-July. The postponement of the duty enforcement has restored predictability for now to the EU corn import market until the new EU winter crop becomes available. However, these retaliatory actions, if finally enforced, combined with Chinese duties on U.S. corn, would have the potential to reshape global corn trade routes toward Ukraine and Brazil as alternative non-EU suppliers.[16]

A lower domestic supply and tight ending stocks in MY 2024/25 support the increase projected in corn import demand, also revealed by the trade data available for the first four months of MY 2024/25. The import pace is projected to be maintained through the rest of the season. Despite harvesting a lower crop, Ukraine has been the major EU supplier during the first four months of the current season due to its advantageous geographical position and price competitiveness. While the import restrictions and measures by Ukraine-neighboring Member States are still in place, corn shipments continue to flow freely to other Member States using mainly the water routes from the Odessa region through the Black Sea and only occasionally the transit routes offered by the Danube River in Romania or rail and road routes. Ukraine's corn competitiveness on the EU market depends on the outcome of the discussions between EU and Ukraine regarding the current trade measures.[17]

[14] According to the March 31, 2025, Prospective Plantings Report, corn planted area for all purposes in the United States in 2025 is estimated at 95.3 million acres, up 5 percent or 4.73 million acres from last year. Compared with last year, planted acreage is expected to be up or unchanged in 40 of the 48 estimating States.
[15] HS Code: 10059000, corn (excl. seed for sowing).
[16] For additional information regarding potential EU import duties, consult Policy Section below. For additional information, please consult GAIN Report: Compendium of Chinese Tariffs on United States Agricultural and Related Products and China: SCTC Announces Retaliatory Tariffs on US Agricultural Products.
[17] For additional details please consult Policy Section below.

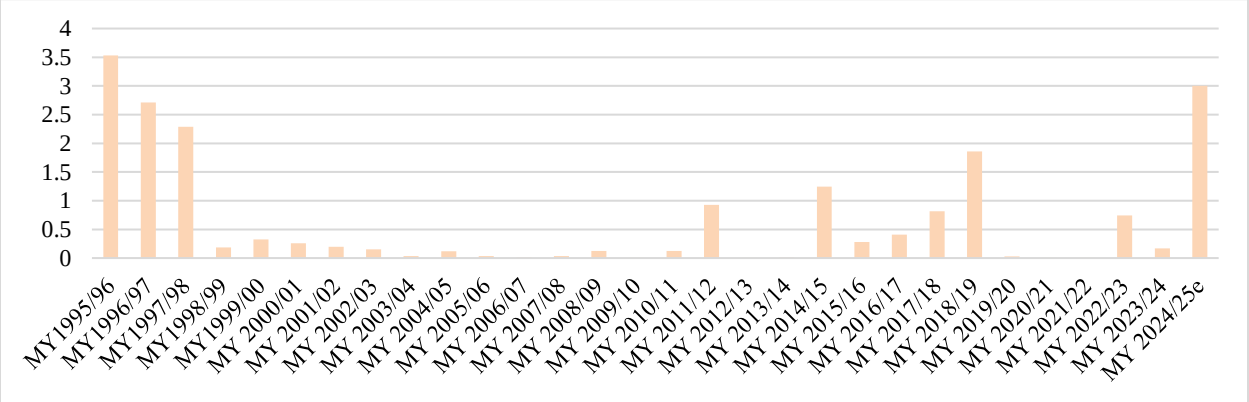
Figure 14. Main Corn Suppliers to the EU (Million MT)



Source: Trade Data Monitor, LLC.

In MY 2024/25, the United States strengthened its position in the EU amid abundant harvest and reduced competition from other key suppliers. Increased domestic demand for bioethanol and the livestock industry pressured the exportable supply from Brazil, allowing the United States to capture an additional market share and become the second corn supplier on the EU market. EU imports of U.S. corn climbed to over 1 million MMT during the first four months of the current season from 23,000 MT a year ago. The main beneficiary of imports from the United States is Spain, due to its geographical position and the thriving livestock sector. According to the U.S. Exports Sales Report, to date in MY 2024/25, 2.9 million MT of U.S. corn are committed to be exported to the EU. However, any change in the current trading regime from the EU side has the potential to affect U.S. corn competitiveness. The decision regarding the implementation of a 25 percent EU tariff on U.S. corn is now on hold until mid-July.[18] Canada is also forecast to increase its exports and displace part of the Brazilian-origin imports.

Figure 15. EU Imports of U.S. Corn (MMT)



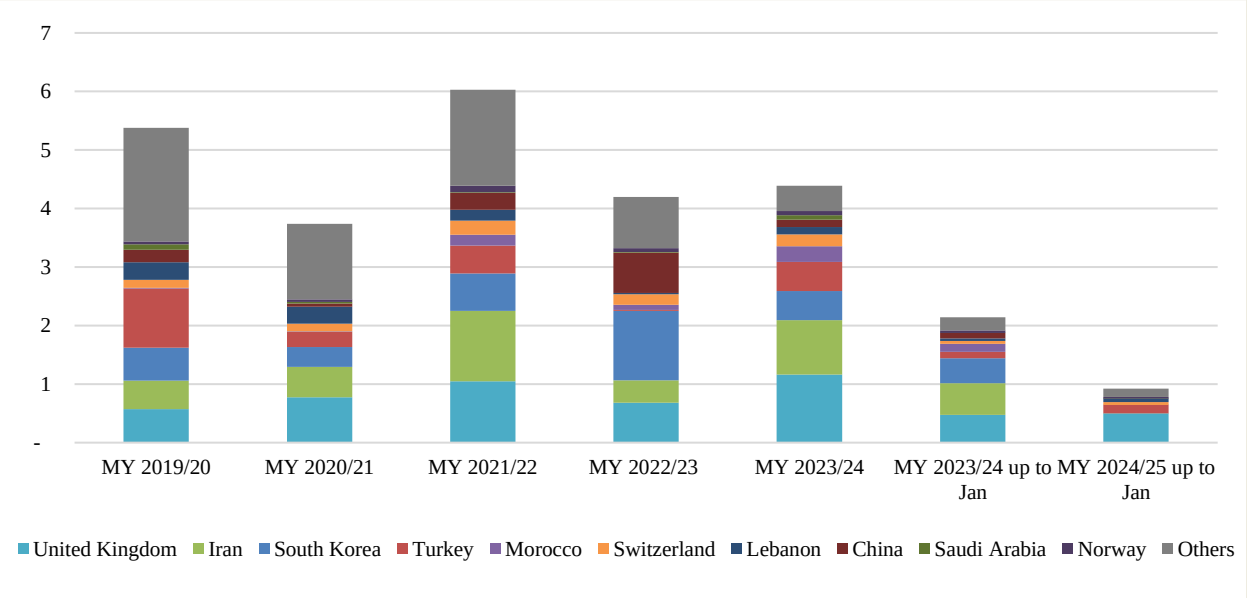
Source: Trade Data Monitor, LLC data.

[18] For additional information consult Policy Section below.

The production boost in MY 2025/26 is anticipated to allow the EU to partially regain its lost export market. Exports are forecast to be above the current season. Romania is anticipated to remain the largest exporter due to its competitiveness and geographical position in supplying the traditional export markets in Middle East and North Africa. Similarly, Bulgaria intends to grow exports amid crop recovery expectations, while France and Poland are anticipated to reduce their export intentions in MY 2025/26 because of potential competition loss against the Black Sea exporters.

Compared to the previous season, in MY 2024/25 EU corn exports are expected to drop significantly because of both quantity and quality reasons. The trade figures pertaining to the first four months of the season show a decrease by more than half, confirming the EU need to prioritize its supply for covering the internal demand. The quality issues this year crop pushed buyers, such as South Korea, an important market particularly for Romania, to alternative suppliers. On the other hand, Türkiye appears as a good market for the EU due to the favorable trade policy, namely the import quota with a reduced five percent duty until June 30, 2025. The corn demand in the United Kingdom will continue to be covered mainly by France. Elsewhere, particularly in the Middle East and North Africa, EU will possibly reduce its presence due to its short crop in MY 2024/25.

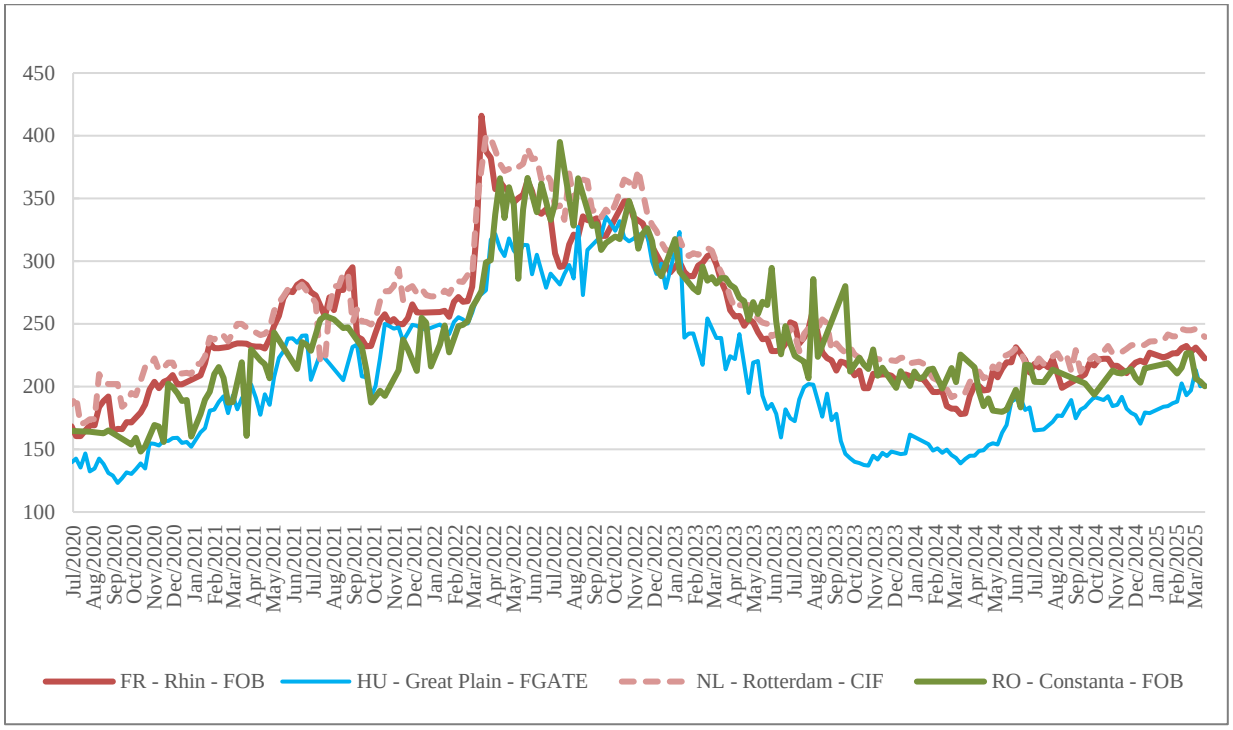
Figure 16. Main Export Destinations for EU Corn (Million MT)



Source: Trade Data Monitor, LLC.

The partial crop recovery to be achieved in MY 2025/26 will not be sufficient for a restoration in the ending stocks, hence the balance will deteriorate further. As a result of the short EU harvest in MY 2024/25, inventories are foreseen to remain tight.

Figure 17. EU Corn Prices (Euros/MT)



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

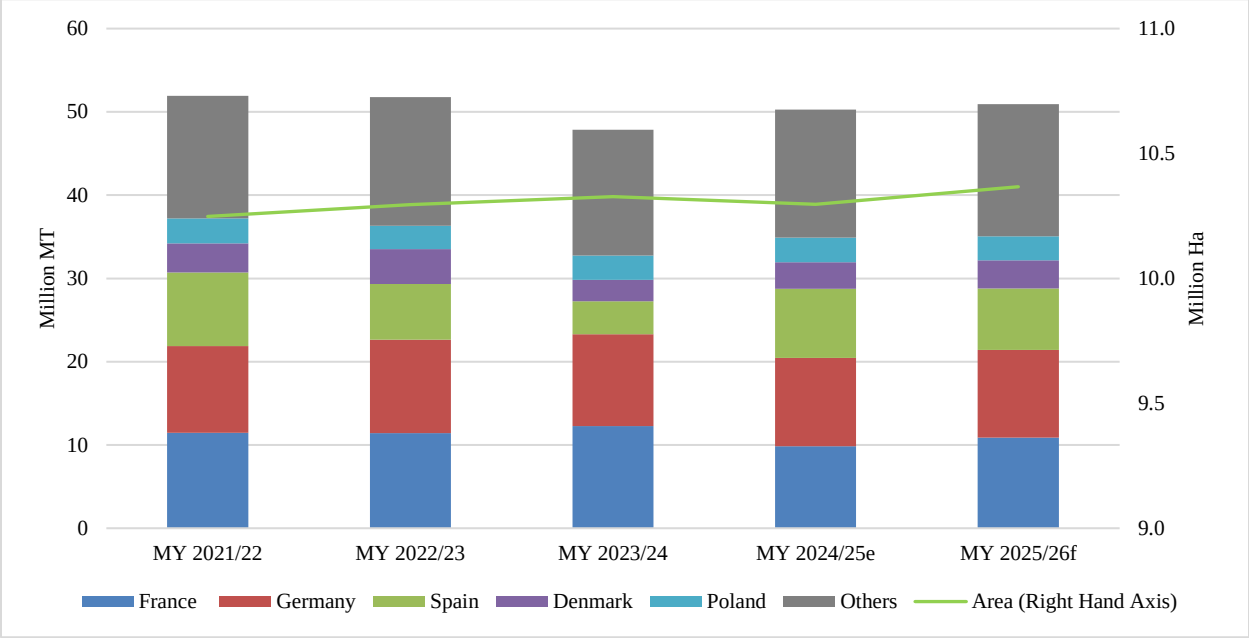
Barley

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	10,296		10,370
Beginning Stocks (1000 MT)	5,726	5,726	5,432	5,605		5,785
Production (1000 MT)	47,903	47,859	50,328	50,180		50,900
MY Imports (1000 MT)	1,962	1,929	1,400	1,050		1,050
TY Imports (1000 MT)	1,625	1,591	1,400	1,000		1,050
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	55,591	55,514	57,160	56,835		57,735
MY Exports (1000 MT)	6,759	6,759	6,000	5,700		6,650
TY Exports (1000 MT)	6,694	6,695	6,200	5,800		6,650
Feed and Residual (1000 MT)	31,000	30,650	33,300	32,650		32,650
FSI Consumption (1000 MT)	12,400	12,500	12,850	12,700		12,700
Total Consumption (1000 MT)	43,400	43,150	46,150	45,350		45,350
Ending Stocks (1000 MT)	5,432	5,605	5,010	5,785		5,735
Total Distribution (1000 MT)	55,591	55,514	57,160	56,835		57,735
Yield (MT/HA)	4.6283	4.6344	4.8772	4.8737		4.9084
(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.

Figure 18. EU Barley Area and Production



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

Barley area in the EU is forecast to grow slightly to 10.37 million ha in MY 2025/26. Farmers in the Nordic countries, Spain, Hungary, and Italy are expected to drive the increase in barley plantings.

The overall outlook for barley production in MY 2025/26 remains satisfactory, and slightly higher yield is projected. Post pegs EU MY 2025/25 barley production at 50.9 million MT, up from the 50.1 million registered in MY 2024/25. In most EU Member States, groundwater reserves were replenished and winterkill was not reported. Spring barley sowing was helped by benign weather in Western Europe, but waterlogged fields in Central France have raised concerns regarding final output. By contrast, winter crops are in good condition in Spain. Dry conditions emerged in Hungary over the past months, however, rains from mid-March restored soil moisture to some extent.

Total barley consumption in MY 2025/26 is anticipated to remain steady, and level off at 45.3 MMT. The industrial utilization of barley is expected to increase moderately. Hungary is progressively exploiting the capacity of a new processing unit intended to produce fuel-grade ethanol, starch, barley protein concentrate, barley wet fiber, and barley husk. However, a sluggish demand in the EU's malting sector is likely to counterbalance the growth in FSI consumption. In MY 2024/25, industrial utilization is projected up as barley can substitute for corn and wheat in ethanol and starch businesses. Similarly, barley can compensate for a weak harvest depending on supply, price spreads, and mycotoxin problems with corn in the drought- and heatwave-hit Member States. A growth is also expected in demand for barley protein concentrate to be used in animal feed, pet food, and food as vegan protein source.

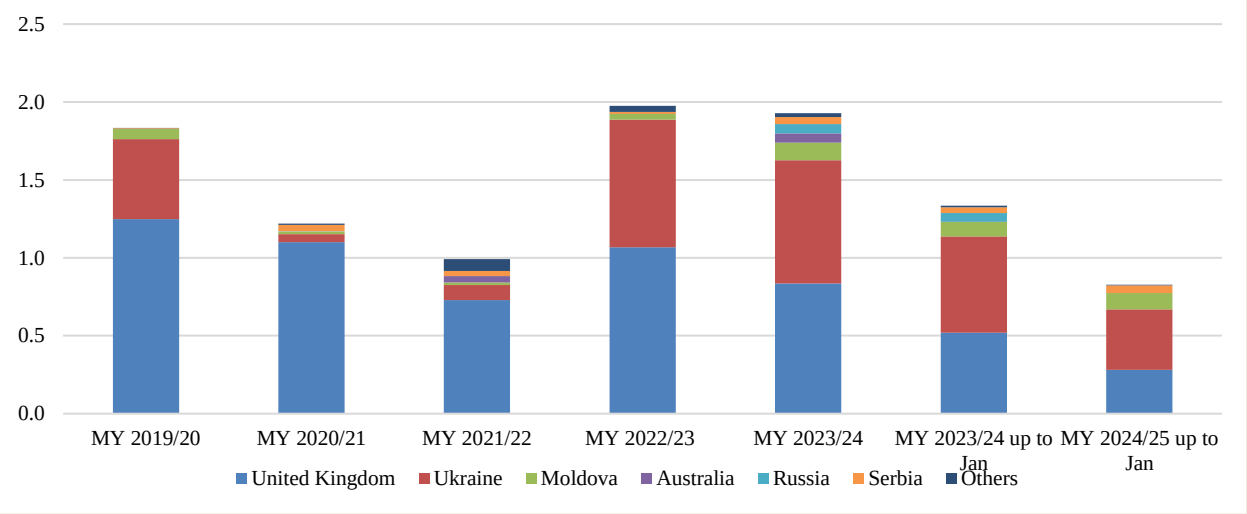
Demand for feed barley is estimated at 32.6 MMT in MY 2025/26, showing a flat trend despite the declining, or at most stable, EU swine and cattle production, and the better corn and wheat supply. Barley use in feed has the potential to grow in France and the Nordic countries stemming from higher

availability and improved competitiveness against wheat. Additionally, solid internal demand drives the ongoing growth of the poultry sector, which also works against a decline in feed consumption.

In MY 2024/25, feed consumption is projected sharply up due to a larger domestic supply, the recovery in swine and cattle feed demand, and the need to compensate for low wheat and corn harvests. Despite the lack of competitiveness on the Spanish market, the strong recovery in Spain's production pulls the feed consumption up this year. The EU Nordic countries are a relatively closed market, hence, the registered rebound in production also results in higher feed barley utilization in MY 2024/25.

EU barley imports are projected to remain low in MY 2025/26 as moderately improved supply is anticipated without significant changes in consumption. By contrast, imports are down in MY 2024/25 because of increased domestic availability, particularly in Spain, after the previous year's setback and drought-hit conditions. Additionally, the main supplier Ukraine's exportable stocks have been sold out due to a significant increase in deliveries to the Chinese market at the expense of lower presence in the EU. Imports from the United Kingdom are also below the previous year's levels, given the significant Spanish barley crop rebound in 2024. While the actual volumes exported are rather limited, U.S. barley[19] is among the products targeted in the EU Commission's response to U.S. Section 232 tariffs on Aluminum and Steel. However, EU's 25 percent retaliatory measures are now on hold until mid-July.[20]

Figure 19. Main Barley Suppliers to the EU (Million MT)



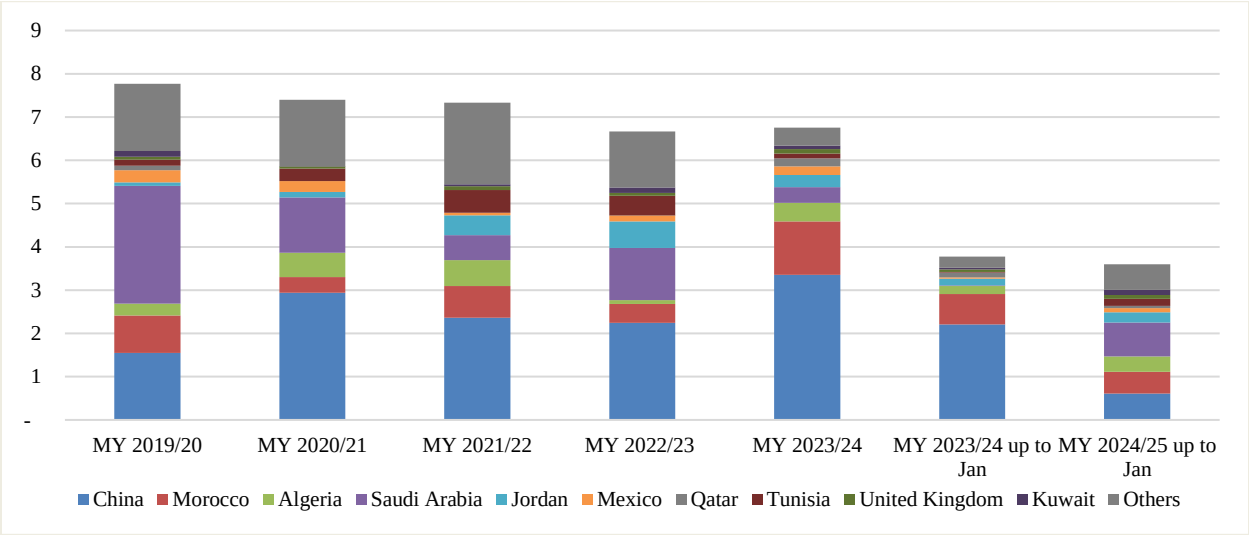
Source: Trade Data Monitor, LLC.

Since the outlook for barley production is satisfactory, EU barley exports in MY 2025/26 are forecast to bounce back to 6.6 MMT. Expecting a tight world market, France has the potential to improve its position in China with competitive prices against Australia and Ukraine. Romania and Germany are also projected to maintain their exports to the Middle East and North Africa against Russian, Ukrainian, Australian, and Argentinean origins. In MY 2024/25, the lower level of imports and higher demand for barley in the feed and processing industries are limiting factors in trade. Therefore, EU exports are

[19] HS Code: 10039000, barley (excl. seed for sowing).
[20] For additional information see Section IV Policy.

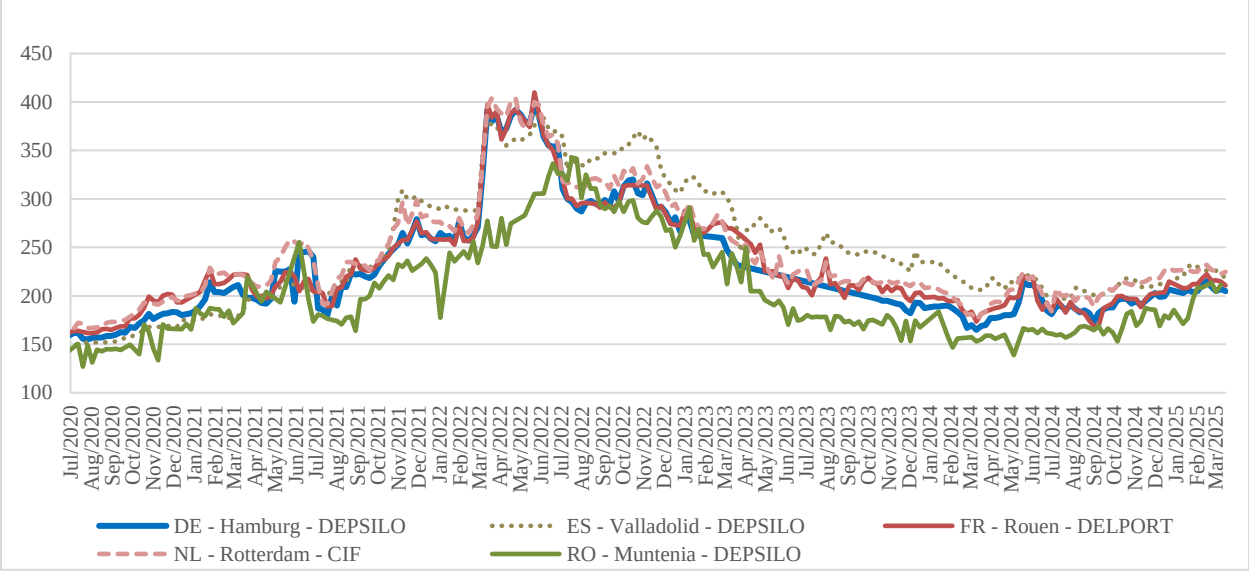
anticipated to decline to 5.7 MMT. French barley exports destined for China fell significantly (by 1.47 MMT) year-on-year, until January 2025, while Australia and Ukraine dominated the Chinese export market.

Figure 20. Main Export Destinations for EU Barley (Million MT)



Source: Trade Data Monitor, LLC.

Figure 21. EU Feed Barley Prices (Euros/MT)



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

A slightly tighter stock situation is expected by the end of MY 2025/26. By contrast, compared to the previous year, a more comfortable but still tight level of ending stocks is projected in MY 2024/25.

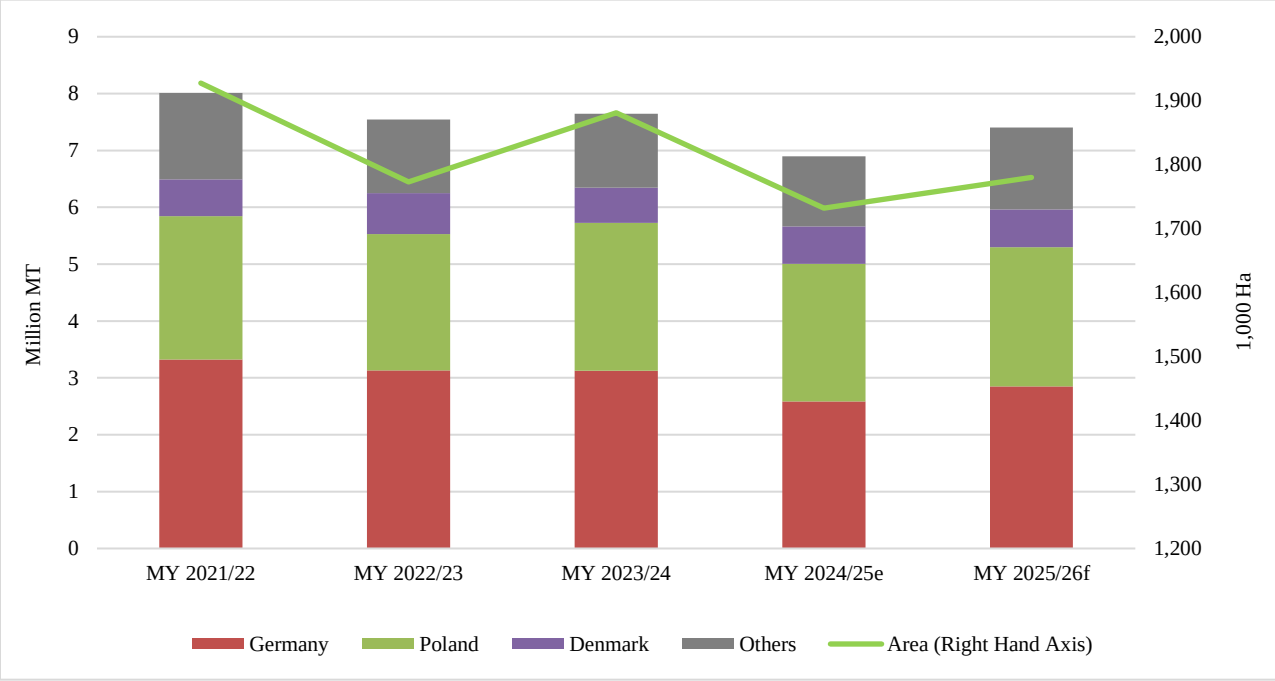
Rye

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	1,881	1,732	1,732		1,780
Beginning Stocks (1000 MT)	1,202	1,202	1,313	1,356		936
Production (1000 MT)	7,647	7,647	6,896	6,896		7,405
MY Imports (1000 MT)	187	187	20	40		45
TY Imports (1000 MT)	167	167	25	35		35
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	9,036	9,036	8,229	8,292		8,386
MY Exports (1000 MT)	238	238	120	146		165
TY Exports (1000 MT)	213	213	150	160		170
Feed and Residual (1000 MT)	4,400	4,157	4,200	4,260		4,454
FSI Consumption (1000 MT)	3,085	3,285	3,000	2,950		2,990
Total Consumption (1000 MT)	7,485	7,442	7,200	7,210		7,444
Ending Stocks (1000 MT)	1,313	1,356	909	936		777
Total Distribution (1000 MT)	9,036	9,036	8,229	8,292		8,386
Yield (MT/HA)	4.0654	4.0654	3.9815	3.9815		4.1601
(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.

Figure 22. EU Rye Area and Production



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

In MY 2025/26, EU rye planted area is forecasted to increase slightly compared to the previous season and amount to 1.8 million Ha, bouncing back to average area levels, after hitting bottom in MY 2024/25 when unfavorable conditions undermined fall plantings. The rye area recovery is projected across the entire EU, with the notable exception of Denmark. The area expansion is primarily driven by the larger area planted in Poland and Germany, which combined account for over 70 percent of the EU's total area.

EU's rye production is expected to increase to 7.4 MMT in MY 2025/26, as improved or stable yields are anticipated in almost all Member States. A significant production recovery is forecast in Germany after the poor results obtained in MY 2024/25. In Poland, production is also expected to grow in line with the increased area. Conversely, the lower area planted in Denmark reduces output expectations.

In the EU, rye is predominantly planted on less fertile and sandy soils, therefore, the yield will depend on the weather conditions and amount of rainfall in the coming months. In EU's main producers, during winter rye crops were in very good condition as no winterkills were recorded and the crop development was normal. In Poland, particularly in the east of the country, the impact of early spring drought, which makes fertilization of plants difficult and reduces nitrogen absorption remains, needs to be monitored as it has the potential to push yield expectations down.

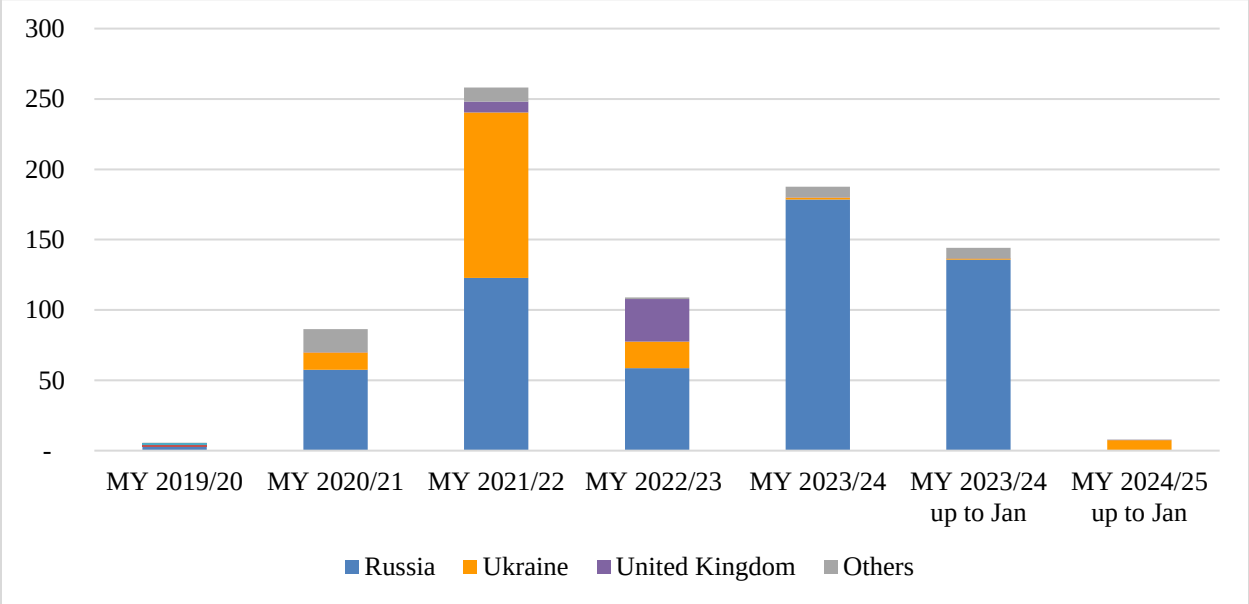
In MY 2025/26, rye feed use is forecasted higher to recover in line with the larger domestic availability. Conversely in Poland and Denmark, rye consumption is expected to remain flat. Rye consumption for feed in the EU remains mainly a function of production and is largely consumed in on-farm feed.

In MY 2025/26, FSI consumption is expected slightly up, driven by higher industrial use in Germany. Poland's industrial rye use, mostly for bioethanol and biogas production purposes, is projected to stay flat. Rye human consumption is forecast to remain unchanged in most countries, except for Italy, where an increase in rye processing for food is projected, and in Czechia and Germany, where decline in food use of rye is expected.

EU rye is largely traded within the EU. Only two percent of production is exported outside the bloc. The United States, where rye is used to produce whiskey, accounts for nearly eighty percent of the EU's rye exports, sourced mainly out of Germany. Other export destinations for EU rye, but to a much lesser extent, include the United Kingdom, Norway, and Japan. While the actual volumes exported are rather limited, U.S. rye[21] is among the products targeted in the EU Commission's response to U.S. Section 232 tariffs on Aluminum and Steel. However, the EU's 25 percent retaliatory measures are now on hold until mid-July.[22]

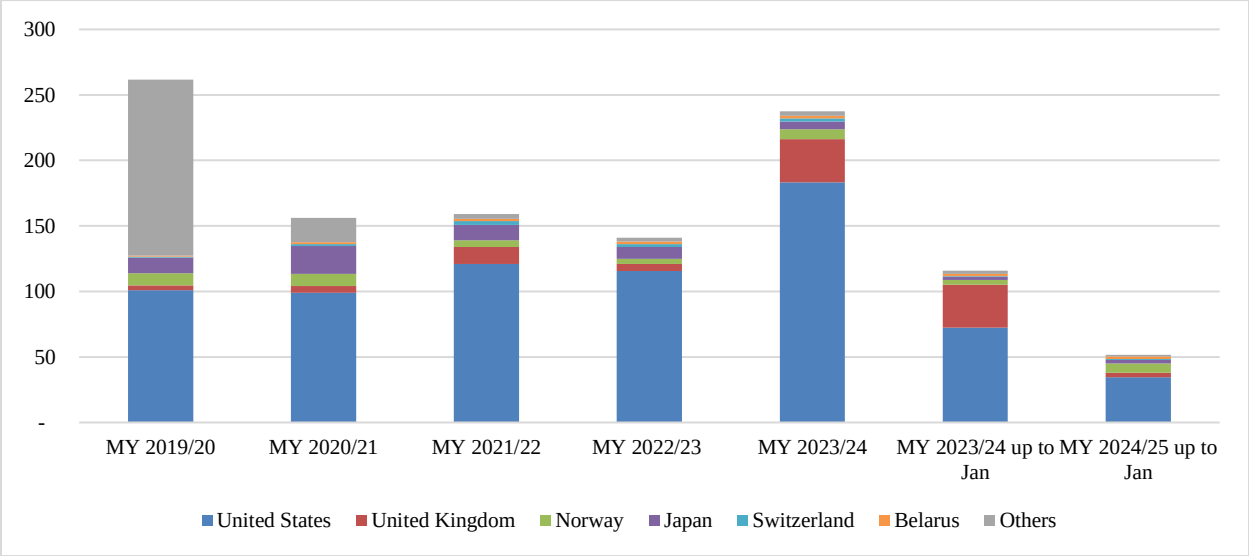
[21] HS Code: 10029000, rye (excl. seed for sowing).
[22] For additional information see Section IV Policy.

Figure 23. Main Rye Suppliers to the EU (1,000 MT)



Source: Trade Data Monitor, LLC.

Figure 24. Main Export Destinations for EU Rye (1,000 MT)



Source: Trade Data Monitor, LLC.

EU rye ending stocks forecast for MY 2025/26 are expected to decrease due to forecast higher feed consumption. In MY 2024/25, the combination of lower than last year's availability and high feed consumption is projected to result in an ending stock contraction. Rye stocks are fairly concentrated in large producing Member States such as Germany, Poland, and to a much lesser extent in Latvia, Estonia, and Denmark.

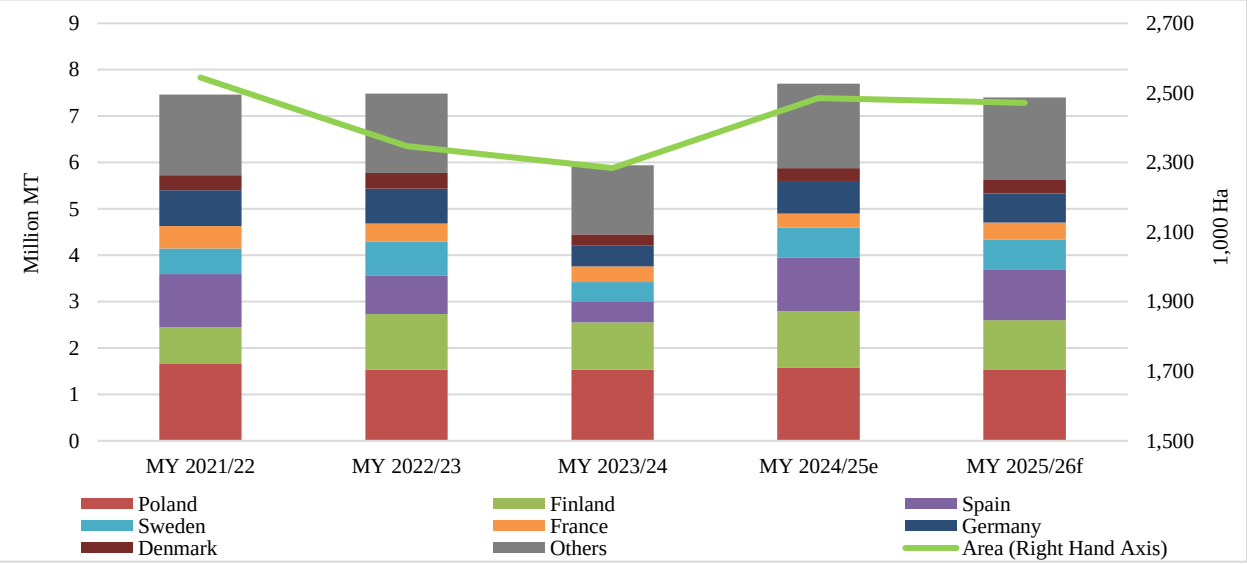
Oats

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	2,485		2,470
Beginning Stocks (1000 MT)	596	596	293	252		559
Production (1000 MT)	5,941	5,941	7,754	7,699		7,400
MY Imports (1000 MT)	109	109	65	85		90
TY Imports (1000 MT)	98	98	65	75		80
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	6,646	6,646	8,112	8,036		8,049
MY Exports (1000 MT)	118	118	115	130		126
TY Exports (1000 MT)	118	118	115	125		115
Feed and Residual (1000 MT)	4,800	4,827	6,050	5,830		5,700
FSI Consumption (1000 MT)	1,435	1,449	1,465	1,517		1,526
Total Consumption (1000 MT)	6,235	6,276	7,515	7,347		7,226
Ending Stocks (1000 MT)	293	252	482	559		697
Total Distribution (1000 MT)	6,646	6,646	8,112	8,036		8,049
Yield (MT/HA)	2.6011	2.6011	3.1203	3.0982		2.996
(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.

Figure 25. EU Oats Area and Production



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

In MY 2025/26, EU oats planted area is forecasted to decrease marginally compared to the previous year but remain at a relatively high level. EU farmers continue to show interest in growing oats due to expected high profitability of the crop. Oats in the EU are for the most part a spring crop. Consequently,

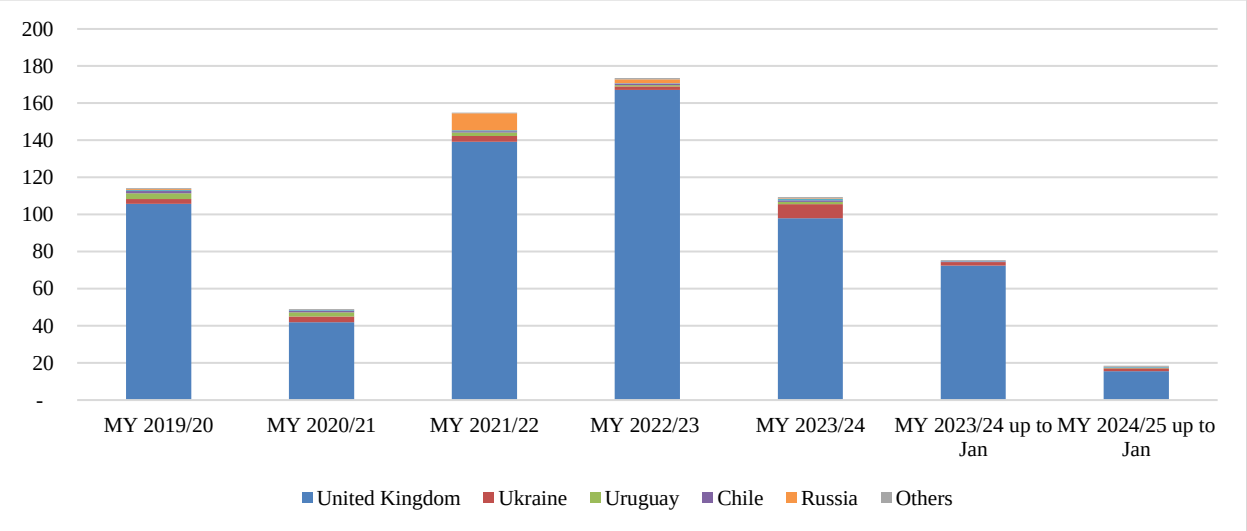
oats area has been negatively affected by farmers' strategy to expand their winter grains plantings to secure yields.

EU production is expected to amount to 7.4 million MT in MY 2025/26, down from the nearly 7.7 million MT estimated for MY 2024/25. Lower oat harvests than last year are expected for all major oat producers in the EU, which include Poland, Spain, Finland, Sweden, and Germany, driven by the lower area sown, except for Finland and Sweden, where the bumper yields are not expected to be repeated.

In line with the lower domestic availability, in MY 2025/26, total and feed consumption of oats is forecast lower than last year. Feed consumption of oats occurs primarily on-farm. Conversely, in MY 2025/26, EU oats FSI consumption is estimated only slightly above the previous season and driven by the somewhat increased human consumption, particularly in Poland, Finland, and Romania.

MY 2025/26 exports are projected at lower levels than the previous year, given the lower domestic production. Oats are traditionally traded within the EU. Export volumes to non-EU countries are stable and usually originate from Latvia, Finland, and Sweden, and are mainly directed to non-EU countries such Switzerland, Norway, the United States, the United Kingdom, and Algeria. Major EU oats producers prioritize trade commitments and adjust domestic use accordingly. The United Kingdom is by far the EU's largest oat supplier. While the actual volumes exported are rather limited, U.S. oats[23] are among the products targeted in the EU Commission's response to U.S. Section 232 tariffs on Aluminum and Steel. However, the EU's 25 percent retaliatory measures are now on hold until mid-July.[24]

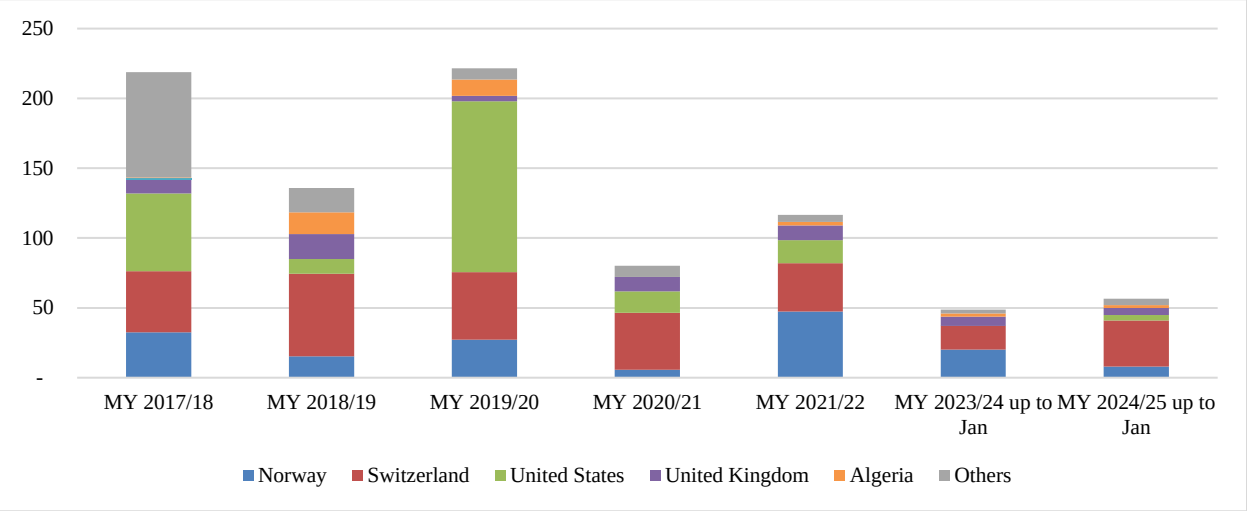
Figure 26. Main Oats Suppliers to the EU (1,000 MT)



Source: Trade Data Monitor, LLC.

[23] HS Code: 10049000, oats (excl. seed for sowing).
[24] For additional information see Section IV Policy.

Figure 27. Main Export Destinations for EU Oats (1,000 MT)



Source: Trade Data Monitor, LLC.

In MY 2025/26, the EU is projected to continue to rebuild stocks depleted by the very poor harvest in MY 2023/24. In Poland, the main producer of oats in the EU, stocks are forecast to decline due to the expected increase in exports.

Mixed Grains[25]

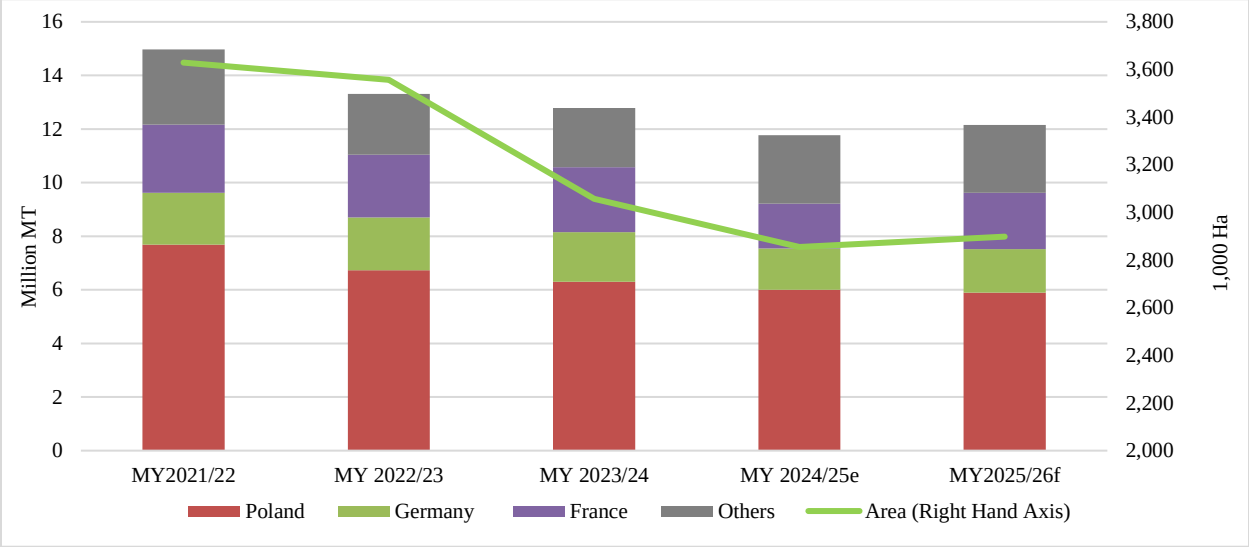
Table 7. Production, Supply and Distribution – Mixed Grains

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	3,057	2,870	2,855		2,900
Beginning Stocks (1000 MT)	968	968	825	994		803
Production (1000 MT)	12,807	12,783	11,797	11,768		12,150
Total Supply (1000 MT)	13,775	13,751	12,622	12,762		12,953
Feed and Residual (1000 MT)	11,200	11,100	10,200	10,500		10,670
FSI Consumption (1000 MT)	1,750	1,657	1,575	1,459		1,458
Total Consumption (1000 MT)	12,950	12,757	11,775	11,959		12,128
Ending Stocks (1000 MT)	825	994	847	803		825
Total Distribution (1000 MT)	13,775	13,751	12,622	12,762		12,953
Yield (MT/HA)	4.1717	4.1816	4.1105	4.1219		4.1897
(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 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

[25] 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.

Figure 28. EU Mixed Grains Area and Production



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

Forecasted planting area for mixed grains in MY 2025/26 remains in line with the last MY 2024/25, amounting to 2.9 million Ha. Almost all EU producers of mixed grains, including Poland, forecast no changes in planting area from the last year. Only France and Germany predict increased area for mixed grains production, basically a rebound from the lower previous year. In MY 2024/25, France and Germany had a lower than usual area due to difficult weather conditions during planting. Triticale is the most profitable and largest category within mixed grains and is largely planted in fall, while other mixed grains are planted in spring. Farmers preference for higher triticale share within mixed grains is growing, given the growing preference to feed triticale to livestock over other mixed grains due to its higher nutritional value. Triticale mostly replaces wheat on less fertile soils that are still too good for rye.

Mixed grain production in MY 2025/26 is forecast at 12.2 MMT, slightly above last marketing year's output. The projected increase is a result of a projected rebound both in area and yield. In Poland, the EU largest mixed grain producer, winter triticale remains in good condition after winter.

In MY 2025/26, feed use of mixed grains is forecast to increase due to the larger anticipated availability. Feed is the main usage for mixed grains, accounting for roughly 90 percent of total consumption. Triticale is used both for on-farm feed production and by the feed industry. Mixed grains are used by farmers for their day-to-day needs. FSI use of mixed grains in MY 2025/26 is predicted stable and dominated by industrial use for bioethanol and biogas production.

Mixed grains' trade is limited to exchanges for feed or industrial purposes between Poland and Germany. It is expected that MY 2025/26 ending stocks will be higher in comparison with the previous year, given the higher production. However, mixed grains stocks are used systematically throughout the year, so end-of-year stocks are usually small.

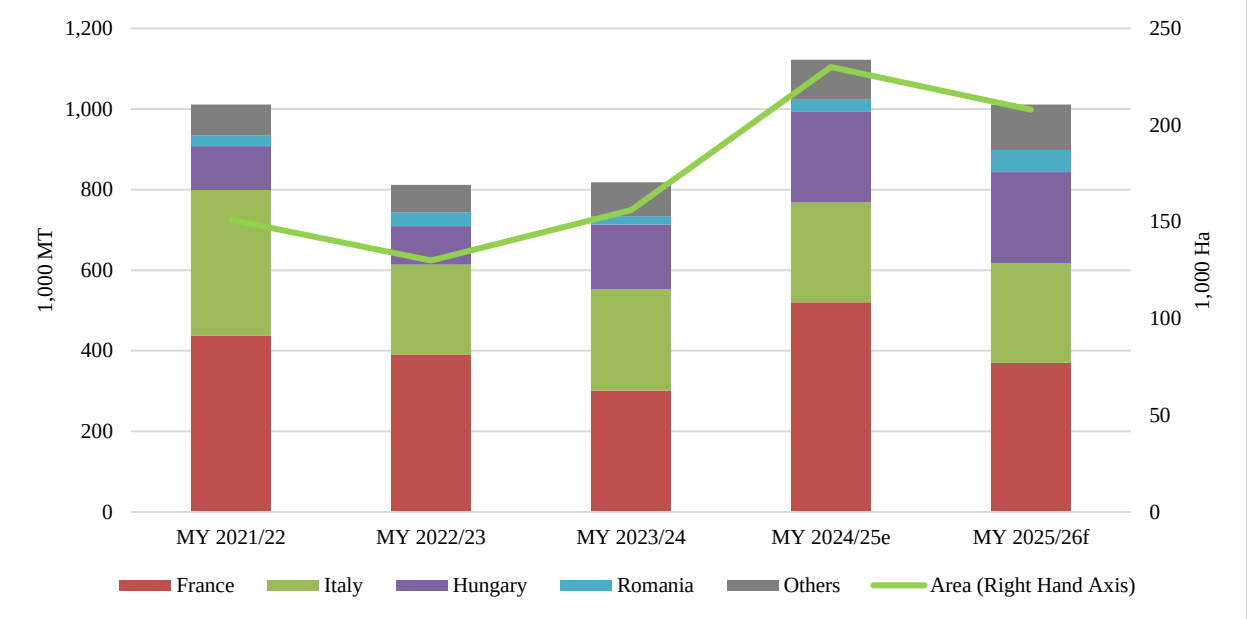
Sorghum

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	230		208
Beginning Stocks (1000 MT)	15	15	21	35		99
Production (1000 MT)	794	818	1,089	1,125		1,015
MY Imports (1000 MT)	20	20	60	65		20
TY Imports (1000 MT)	16	16	60	65		20
TY Imp. from U.S. (1000 MT)	0	2	0	0		0
Total Supply (1000 MT)	829	853	1,170	1,225		1,134
MY Exports (1000 MT)	13	13	20	20		15
TY Exports (1000 MT)	11	11	15	15		10
Feed and Residual (1000 MT)	780	790	1,110	1,090		1,025
FSI Consumption (1000 MT)	15	15	15	16		16
Total Consumption (1000 MT)	795	805	1,125	1,106		1,041
Ending Stocks (1000 MT)	21	35	25	99		78
Total Distribution (1000 MT)	829	853	1,170	1,225		1,134
Yield (MT/HA)	5.3289	5.2436	4.9276	4.8913		4.8798
(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.

Figure 29. EU Sorghum Area and Production



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

EU sorghum area in the EU is anticipated to amount to 208 thousand Ha[26] in MY 2025/26, down from the 230 thousand Ha planted to sorghum in MY 2024/25. This area decline is largely driven by the lower planting intentions anticipated in France, more than offsetting the anticipated area increase projected in Romania. In Romania, after struggling with drought-hit corn yields in MY 2024/25, in MY 2025/26 farmers have opted to increase the area planted to this drought-resilient spring-planted crop. Conversely, French farmers have switched from sorghum back to corn in response to the abundant amount of rainfall in France registered in summer 2024, dissipating drought concerns.

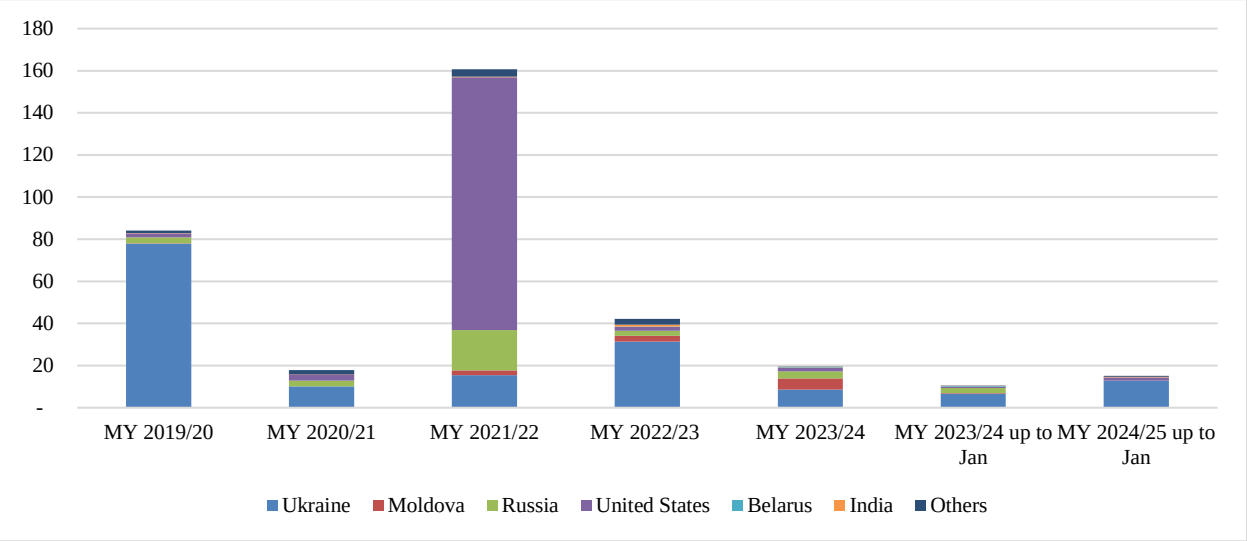
Assuming average conditions, in MY 2025/26 EU sorghum production may amount to just above one MMT. Grain sorghum production in the EU has witnessed a long-term expansion. The fact that sorghum has lower input needs (plant protection, products, fertilizers, water) compared to more input-intensive spring planted crops such corn, continues to raise interest among farmers. However, downward corrections in sorghum area occur when excessive moisture conditions concur in the previous season. Sorghum cultivation is only present in few EU Member States, namely France, Italy, and Hungary. These three countries concentrate eighty percent of the EU's sorghum area.

Sorghum consumption remains concentrated in the above-mentioned producing EU Member States, along with net grain-importing EU Member States, such as Spain or the Netherlands.

MY 2025/26 evolution of sorghum imports by the EU will be determined by the duties applicable to grains trade worldwide,[27] particularly if a tight EU feed grain supply, significant discounted price against corn, and favorable transport logistics concur. However, normally Ukraine is better positioned than the United States to supply the EU's sorghum import demand for both animal feed and bioethanol production. Trade data available through January 2024 show a significant recovery of Ukraine sorghum sales to the EU, which in seven months alone stood at 13 thousand MT. At the same time, according to the U.S. exports sales report, in MY 2024/25 to date, the EU has already imported 52 thousand MT of U.S. sorghum.

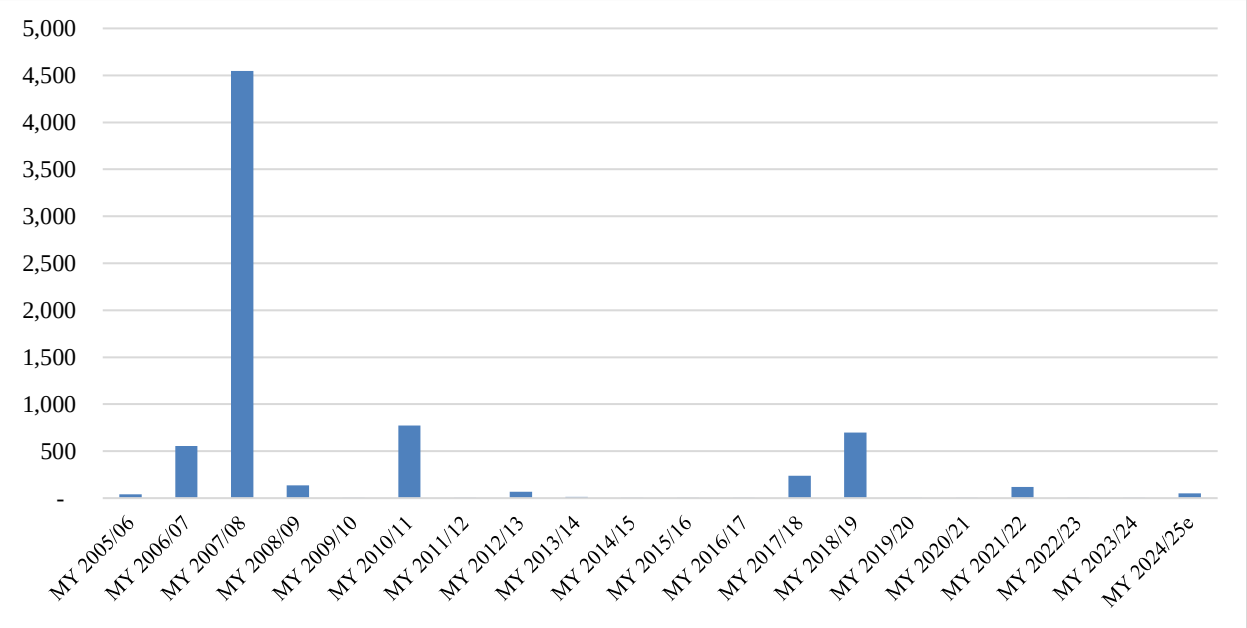
[26] Note that as of the drafting of this report, most of the sorghum in the EU has not been yet planted. Thus, forecasts are based on farmer's planting intentions.
[27] For additional information, please consult GAIN Report: Compendium of Chinese Tariffs on United States Agricultural and Related Products and China: SCTC Announces Retaliatory Tariffs on US Agricultural Products. Additional information regarding potential EU import duties can be consulted in the Policy Section below.

Figure 30. Main Sorghum Suppliers to the EU (1,000 MT)



Source: Trade Data Monitor, LLC.

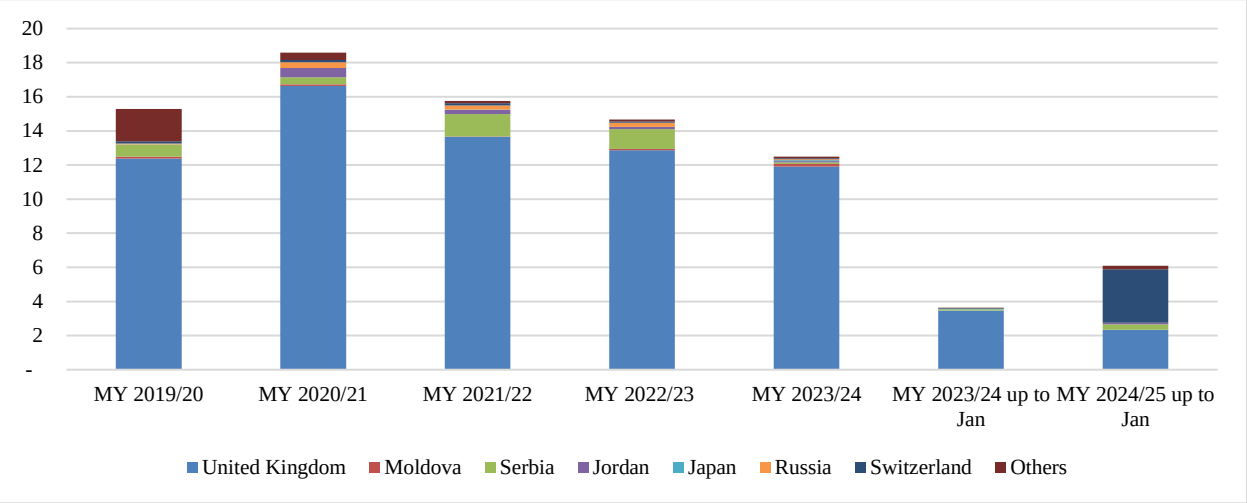
Figure 31. EU Imports of U.S. Sorghum (TMT)



Source: Trade Data Monitor, LLC data.

EU sorghum exports expanded in the first half of the MY 2024/25, driven by the significant increase in sales to Switzerland that more than offsets the slowdown in EU exports to the United Kingdom.

Figure 32. Main Export Destinations for EU Sorghum (1,000 MT)



Source: Trade Data Monitor, LLC.

In MY 2025/26, sorghum ending stocks are expected to revert to average after hitting record levels in MY 2024/25. This bumper level is largely located in France, driven by the sizeable sorghum crop obtained in MY 2024/25.

Section III. Rice

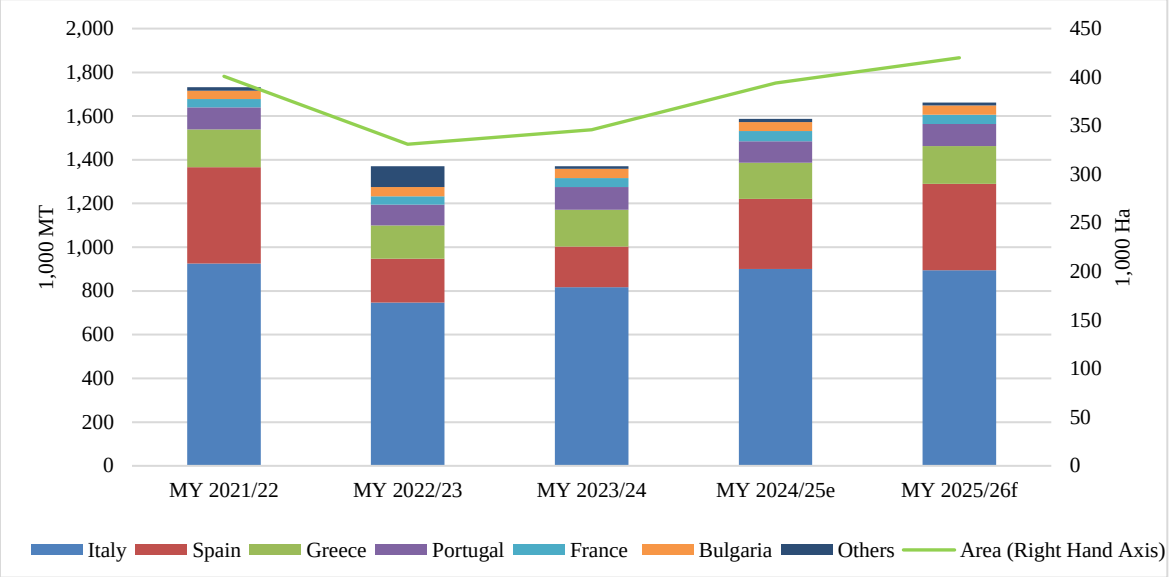
Table 9. Production, Supply and Distribution – Rice[28]

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	394		420
Beginning Stocks (1000 MT)	828	828	699	747		843
Milled Production (1000 MT)	1,371	1,371	1,595	1,536		1,660
Rough Production (1000 MT)	2,141	2,268	2,491	2,581		2,770
Milling Rate (.9999) (1000 MT)	6,404	6,045	6,404	5,951		5,993
MY Imports (1000 MT)	2,109	2,110	2,300	2,200		2,110
TY Imports (1000 MT)	2,411	2,412	2,250	2,250		2,150
TY Imp. from U.S. (1000 MT)	17	17				
Total Supply (1000 MT)	4,308	4,309	4,594	4,483		4,613
MY Exports (1000 MT)	359	362	400	390		415
TY Exports (1000 MT)	362	363	400	390		415
Consumption and Residual (1000 MT)	3,250	3,200	3,350	3,250		3,300
Ending Stocks (1000 MT)	699	747	844	843		898
Total Distribution (1000 MT)	4,308	4,309	4,594	4,483		4,613
Yield (Rough) (MT/HA)	6.1879	6.5549	6.3223	6.5508		6.5952
(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.

[28] Production and trade data include HS Codes 100610, 100620, 100630 and 100640 expressed in Milled Rice Equivalent.

Figure 33. EU Rice Area and Milled Production



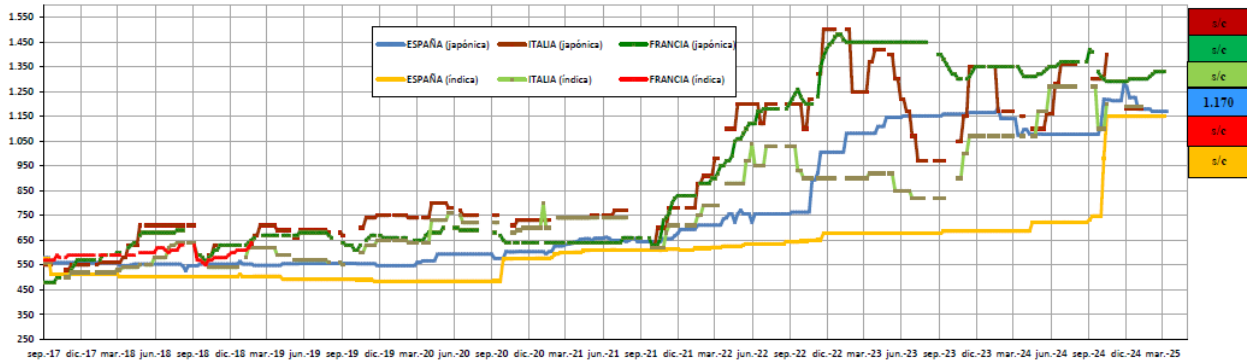
Source: FAS EU Posts estimates based on MS statistical sources.

In MY 2025/26, EU rice area[29] is forecast to increase, driven mainly by Spain and Italy. In Spain, improved irrigation water availability in March has allowed farmers to maximize their rice planting potential, with the exception of the areas in the Valencia region affected by the devastating storm caused by the DANA (a Spanish acronym for high-altitude isolated depression) on October 29, 2024. In Italy, the increase in rice area is linked to its profitability, as rice market prices remain strong. Overall, the expansion in Spain and Italy is expected to offset a modest decrease in France, while rice area is expected to remain stable in Greece, Portugal, Bulgaria, and Romania.

In MY 2025/26, EU rice production[30] is forecast to rise over the previous year with growth in Italy and Spain outpacing the negligible decline anticipated in France. Production is expected to level off in Greece, Portugal, Bulgaria, Romania, and Hungary. Rice cultivation in Italy, the bloc's largest rice producer, accounts for over half of the EU's rice output. Nearly eighty percent of the rice production in Italy consists of Japonica varieties, with the remainder being Indica. Except for limited amounts of rough (un-milled) rice exports and domestic seed sales, almost all Italian rice is marketed as a whole kernel milled product. Spain is the second-largest rice producer in the EU, accounting for approximately twenty percent of overall production. Sixty percent of Spain’s rice cultivation is Japonica, and forty percent corresponds to Indica.

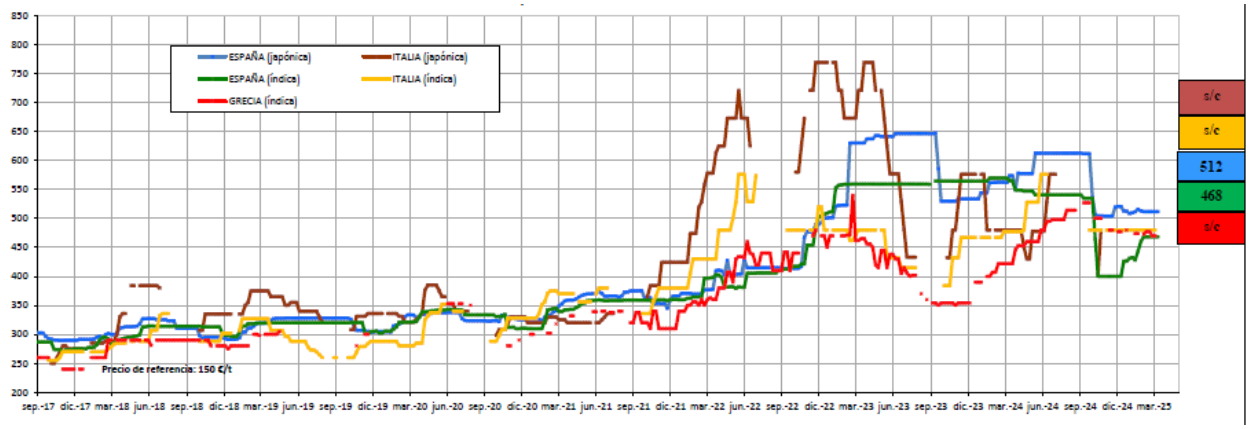
[29] Note that, as of the drafting of this report, most of the rice in the EU has not been planted yet. Farmers' planting intentions may vary depending on the final allocation of irrigation water.
[30] EU rice production is concentrated in seven Member States: Italy, Spain, Greece, Portugal, Bulgaria, France, and Romania.

Figure 34. Milled Rice Prices in the EU (Euros/MT)



Source: Spanish Ministry of Agriculture, Fisheries and Food based on Directorate-General for Agriculture and Rural Development data.

Figure 35. Paddy Rice Prices in the EU (Euros/MT)



Source: Spanish Ministry of Agriculture, Fisheries and Food based on Directorate-General for Agriculture and Rural Development data.

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. Indica rice varieties, such as Basmati and Jasmine, are gaining popularity due to their versatility for quick and varied meal preparations, as well as their growing appeal to a more multicultural demographic.

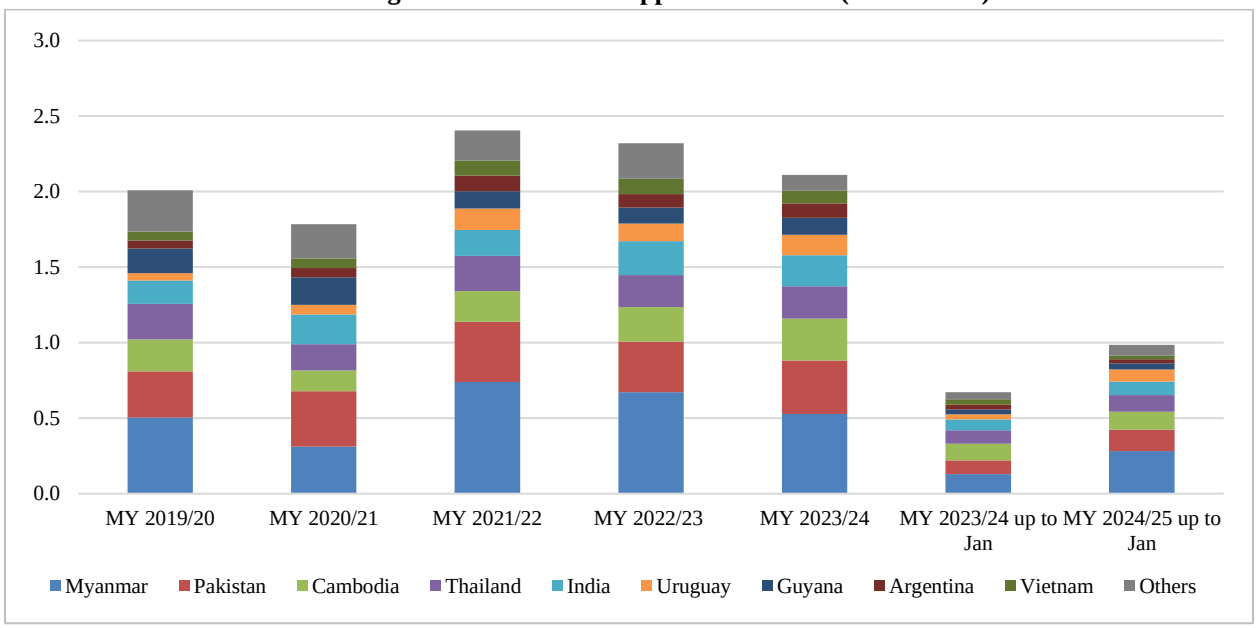
The EU rice market consists of two segments. In major rice-producing Member States such as Italy, Spain, and Greece, Japonica remains the rice of choice for consumers due to its adoption into traditional cuisines like risotto, paella, and seafood dishes. Portugal stands apart, with Indica rice accounting for fifty percent of total consumption, followed by Japonica rice at nearly twenty percent. Basmati rice ranks third, with over 15 percent of the market share.[31]

[31] Interestingly, Japonica rice (Carolino type) production in Portugal accounts for over 65 percent of total, whereas medium grain rice is close to 30 percent and Indica rice (Agulha type) exceeds 5 percent of the country's production.

Meanwhile, non-rice producing EU Member States tend to import Basmati and non-traditional varieties such as wild rice blends, brown (husked) rice, and glutinous rice. Additionally, broken rice is used in the EU in production of rice flour (a common ingredient in gluten-free baking and cooking), puffed rice, beer fermentation, pet food, and animal feed.

Larger availability in EU stocks and domestically produced rice in MY 2025/26 will lower its demand for imports. However, as EU Indica rice production falls short of the bloc's consumer demand, imports of this rice variety are anticipated to continue. Myanmar, Pakistan, Cambodia, and Thailand are expected to remain the EU's leading rice suppliers. The Netherlands serves as a key gateway for rice imports, while Belgium, with its significant milling capacity and lack of domestic production, also plays a major role. Other major rice-importing countries include France and Germany, which have relatively high consumption rates compared to their negligible (France) or non-existing (Germany) domestic rice production.

Figure 36. Main Rice Suppliers to the EU (Million MT)

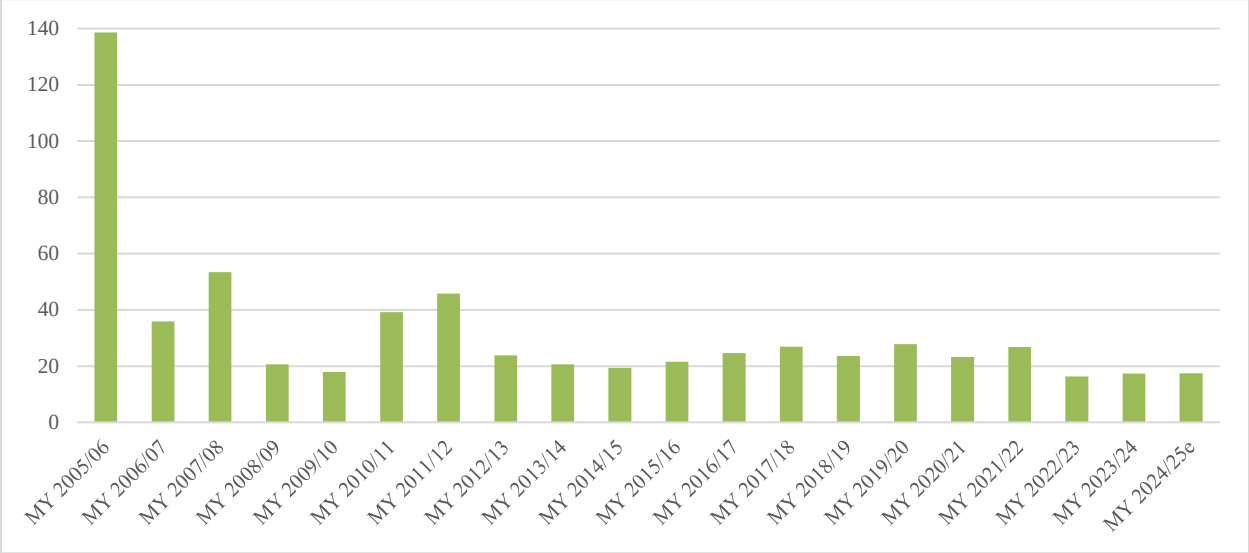


Source: Trade Data Monitor, LLC.

U.S. rice[32] is among the products in the EU's response to the U.S. reimposition of tariffs up to 25 percent on imports of EU steel and aluminum. While these tariffs were initially intended to enter into force in three stages,[33] they are now on hold until mid-July.

[32] HS Codes: 10063021, 10063023,10063025, 10063027, 10063042, 10063044, 10063046, 10063048, 10063061, 10063063, 10063065, 10063067, 10063092, 10063094, 10063096, 10063098, 10064000. (semi-milled, milled rice and broken rice)
[33] As it pertains to rice: on April 15, 2025, for milled, semi-milled and broken rice; and on May 16, 2025, for round grain husked [brown] rice, medium grain husked [brown] rice and long grain husked rice.

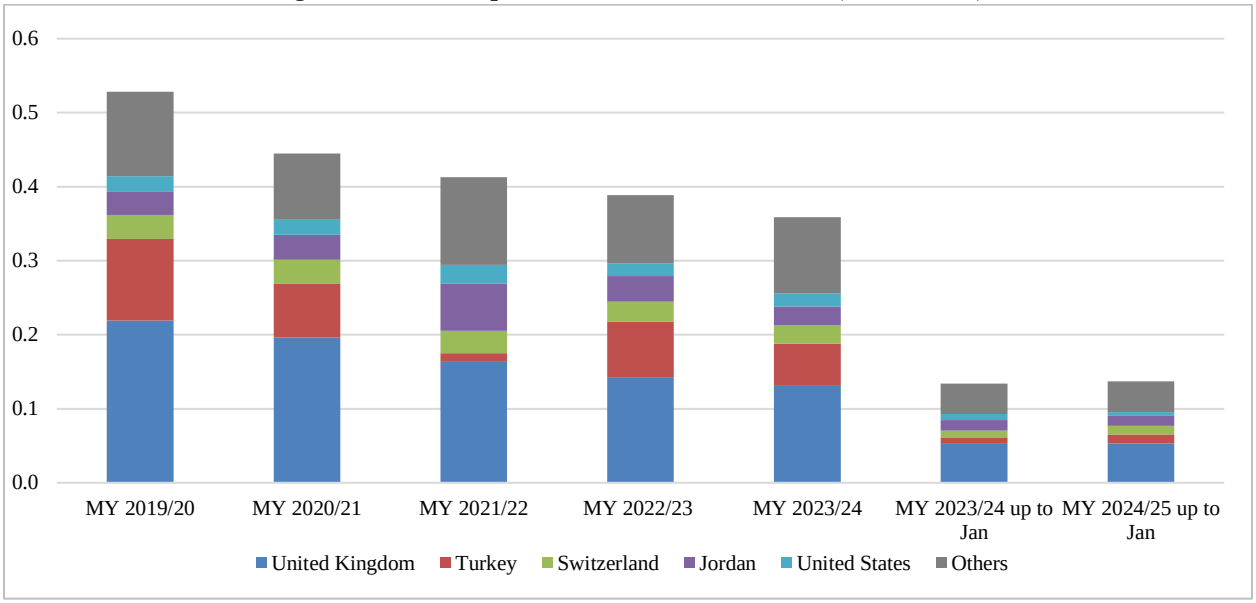
Figure 37. EU Imports of U.S. Rice (TMT)



Source: Trade Data Monitor, LLC.

EU rice exports are forecast to rise slightly in MY 2025/26 on higher domestic availability. Most EU rice exports consist of Japonica varieties to the United Kingdom and Türkiye and are principally sourced from Italy.

Figure 38. Main Export Destinations for EU Rice (Million MT)



Source: Trade Data Monitor, LLC.

Section IV. Policy

Common Agricultural Policy (CAP)

The new EU's Common Agricultural Policy (CAP) for 2023-2027 was adopted on December 2, 2021, and published in the Official Journal on December 6, 2021. EU Member States were requested to submit so-called Strategic Plans, incorporating MS specific goals and initiatives, by the end of 2021. The 'new' CAP was implemented as of January 1, 2023. In March 2024, following weeks of farmer protests across the European Union demanding less administrative burden and better prices, the European Commission published a legislative proposal to amend certain provisions of the Common Agricultural Policy (CAP). The updates to the CAP were adopted in May 2024 and published as Regulation 2024/1468.[34]

EU Vision for Agriculture and Food

On February 19, 2025, the European Commission (EC) published its Vision for Agriculture and Food for the 2024-2029 Von der Leyen II mandate. This document will be the basis of upcoming legislative proposals and other actions taken by the EU executive. The Vision lays down the need for the EU to ensure "a global level playing field" for its farmers and improve their competitiveness. To do so, the Commission proposes the adoption of mirror clauses, notably with regards to pesticides residues, increased border controls, and a slowdown of the pace of plant protection products bans, if no alternatives exist for farmers. It defends the need to sign Free Trade Agreements with more trade partners, while calling for boosting domestic production and diversifying import suppliers to reduce strategic dependencies for products like protein-rich animal feed and fertilizers. Domestically, the Commission wants a simplification of the CAP with a shift towards more incentive-based payments. The EC also proposes to increase the EU's agricultural competitiveness with the swift adoption of the new genomic techniques proposals.

Agricultural Biotechnology[35]

In the EU, commercial cultivation of genetically engineered (GE) crops is limited to one percent of the total corn area, which is concentrated in Spain and Portugal. Since 2015, nineteen EU countries have opted out of GE crop cultivation under Directive (EU) 2015/412. GE corn is primarily used domestically as animal feed. Feed containing GE soybean is labeled as 'contains GE products.' The corn processing industry uses GE-free corn for food production, often sourced through identity-preserved programs. The EU annually imports 12 to 25 million MT of corn and byproducts, with over 20 percent estimated to be GE. U.S. corn exports to the EU declined significantly since 1998 due to slower GE trait approvals and the absence of an EU low-level presence policy.

[34] For more information, please see GAIN Report: EU Commission Proposes Common Agricultural Policy Revisions Following Farmer Protests.
[35] For more information, please see the EU Biotechnology and Other New Production Technologies Annual Report.

EU Plant Protection Products Policy

Plant protection products along with Maximum Residue Limits (MRLs) and import tolerances, are an increasingly important issue in the EU since there is a significant reduction in the number of active substances approved for use. Regulation (EC) No 1107/2009 and Regulation (EC) No 396/2005 regulate PPPs and MRLs, respectively. There is a regular review of active substances for which the approval is up for renewal, as well as their associated MRLs. Existing MRLs are also being reviewed through a process known as an 'Article 12' review. The link refers to a list indicating the upcoming MRL reviews under this Article 12 process. It is important to note that this list is not all-inclusive. Stakeholders are encouraged to actively engage early on in these review processes by reaching out to the applicant. Together with the applicant, they can ensure that the necessary data is available for review or if trials for data collection are in progress or should be initiated etc., especially if the substance is not used or authorized in the EU. Stakeholders are encouraged to engage with FAS on substances and MRLs of importance to their commodities and to check the USEU website for updates of the EU Early Alert.

EU Restrictions on the Use of Neonicotinoids: The EU has prohibited the use of three neonicotinoids (clothianidin, imidacloprid, and thiamethoxam) except for their application in permanent greenhouses since 2018, while a fourth one was banned in 2020 (thiacloprid). Commission Regulation (EU) 2023/334 reduces the current EU maximum residue limits (MRLs) for clothianidin and thiamethoxam to the limit of determination (LOD) and will apply as of March 7, 2026. Imported products will then no longer be able to contain residues of these two neonicotinoids. The proposed reduction in MRLs is based on a stated interest in protecting pollinators in countries outside of the EU and is not related to food safety concerns. Member State level actions include:

- **Romania:** In December 2024, the Romanian Ministry of Agriculture renewed the authorizations for the use of neonicotinoids for corn and sunflower seeds, as a mean to fight *Tanymecus Dialticollis* insect. These derogations followed the earlier authorizations granted to the pesticide companies to use neonicotinoids for the treatment of the straw cereals. Nevertheless, in mid-March 2025, a Romanian court suspended these authorizations following a lawsuit initiated by two organizations representing peasants, farmers, and beekeepers.

Glyphosate: Commission Implementing Regulation (EU) 2023/2660 renewed the approval of the active substance glyphosate for 10 years, until December 15, 2033. The renewal is subject to certain new conditions and restrictions, such as the prohibition of pre-harvest use as a desiccant and the need for certain measures to protect non-target organisms. The placing on the market of plant protection products containing the active substance remains under the responsibility of Member States.

EU Deforestation Regulation

In June 2023, the EC adopted Regulation 2023/1115, also known as the EU Deforestation Regulation (EUDR), aimed to prevent products causing deforestation entering the EU. The proposal targets

products identified as main drivers of deforestation.[36] On December 23, 2024, the EU published Regulation 2024/3234 amending EUDR in the Official Journal. This amendment postpones the date of entry into application of the EUDR by one year to December 30, 2025, for most operators and June 30, 2026, for small and medium sized operators. The amendment also stipulates that the benchmarking of countries should be published by June 30, 2025. This will give operators, including feed importers and manufacturers, additional time to prepare. Although the European Parliament proposed adding corn to the list during the legislative process, it was not included in the final text. However, it is possible that it could be included in the upcoming revisions.

Maximum Levels of Nickel

In February 2024, the EU agreed to establish maximum levels for nickel in cereals used as food. These levels will apply from July 1, 2026, onwards. Cereals put on the market before that date may remain on the market until their minimum durability or use-by data. The newly established levels will be published as an amendment to Commission Regulation (EU) 2023/915 on maximum levels for certain contaminants in food. The Annex to this legislation will include the following addition:

Table 10: Products covered by the new maximum levels of nickel[37]

Product	Maximum level of nickel (mg/kg)
Durum wheat (triticum durum)	1.5
Rice except husked rice	1.5
Husked rice	2.0
Pseudo cereals and millet	3.0
Oats	5.0
Other cereals	0.8

Source: Commission Regulation (EU) 2023/915

[36] EUDR target products include cocoa, coffee, soy, palm oil, wood, rubber, and cattle.

[37] Please note that the maximum level does not apply to cereals used to produce beer or distillates provided that the remaining cereal residue is not placed on the market for the final consumer as food.

EU Grains Import Policy

The EU limits the entry of lower priced grains from non-EU countries through a system of import duties and quotas. Under the Blair House Accord concluded between the United States and the EU in 1993, it was agreed that the difference between the grains import price (Cost Insurance Freight [CIF] duty paid in Rotterdam), and the EU's intervention price could not be greater than 55 percent.

The EU then developed a system where duties were set based on separate reference prices for six grain types and applied to imports of high-quality wheat, durum wheat (high quality), durum wheat (medium quality), maize (corn), flint corn, rye, and sorghum. The resulting duty was set at zero Euro/MT for the above-mentioned grains on July 1, 2024, with Commission Implementing Regulation (EU) 2024/1801. The references considered for duties calculation and a sample of duty calculation are laid down in Implementing Regulation 2023/2384.

Table 11. Reference Used for Calculating Import Duties

Type of Grain	Reference variety	Reference market
High quality wheat	U.S. hard red spring No. 2	Minneapolis
Durum wheat (high quality)	U.S. hard red spring No. 2	Minneapolis
Durum wheat (medium quality)	U.S. hard red spring No. 2	Minneapolis
Corn	U.S. yellow corn No. 2	Chicago Mercantile Exchange
Flint corn	U.S. yellow corn No. 2	Chicago Mercantile Exchange
Other feed grains (rye, sorghum)	U.S. yellow corn No. 2	Chicago Mercantile Exchange

Source: Commission Implementing Regulation 2023/2834.

Table 12. Example Illustrating Method of Calculating EU Import Duties Euro/MT)

Grain	Representative world standard	EU Reference price (a)	World price (b)	FOB premium (c)	Freight (d)	Representative world price (e) = (b)+(c)+(d)	EU duty (a)-(e)
Corn	Chicago yellow corn No. 2	157.03	68.46	16.20	15.56	100.22	56.81
Note: Reference price = EU intervention price is 1.55 times €101.31/MT							

Source: FAS EU Posts.

Details on quotas available for grains imports to the EU are outlined in Table 13.

Table 13. EU Grain Import Quotas Available

Product	Quantity (MT)	Period	Origin	In-Quota Duty (€/MT)
Common Wheat	572,000	Jan – Dec	United States	12 (vs. 95 outside quota)
Common wheat	2,371,600 I) 1,185,800 II) 1,185,800	I) Jan-Jun II) July-Dec	Third countries, other than U.S., Canada and the United Kingdom	12 (vs. 95 outside quota)
Common wheat of a quality other than high quality	129,577	Jan-Dec	All third countries except Belarus, Russia and the United Kingdom	12 (vs. 95 outside quota)
Common wheat and products	1,000,000	Jan-Dec	Ukraine	0 (vs. 95 outside quota)
Corn	276,440 I) 138,220 II) 138,220	I) Jan-Jun II) July-Dec	All origins except the United Kingdom, Russia and Belarus	0 (vs. EU duty calculated value)
Corn and products	650,000	Jan-Dec	Ukraine	0 (vs. EU duty calculation)
Barley and products	350,000	Jan-Dec	Ukraine	0 (vs. 93 outside quota)
Barley	307,105	Jan-Dec	All origins except the United Kingdom, Belarus and Russia	16 (vs. 93 outside quota)
Malting barley	20,789	Jan-Dec	All origins except the United Kingdom, Belarus and Russia	8 (vs. 93 outside quota)

Source: Commission Implementing Regulation (EU) 2020/761, Commission Implementing Regulation (EU) 2020/1988, and Commission Implementing Regulation 2014/416.

Actual quantities of grain traded, based on the European Commission's DG TAXUD surveillance, are published on a weekly basis on Mondays at 16:00 Brussels time on the European Commission website. Import licenses applying to grains subject to TRQs are valid for the current month plus two.

Special Provisions for Corn and Sorghum for Spain and Portugal – "Abatimento": Spain and Portugal's accession to the EU resulted in the application of common EU tariff barriers on Spanish and Portuguese imports. It consequently reduced the competitiveness of imports from non-EU countries. An agreement between the EU and the United States allows for the import of a fixed quantity of non-EU corn and sorghum at a preferential import duty as compensation for the loss of the Spanish and Portuguese market. The current agreement applies to 2 million MT of corn and 0.3 million MT of sorghum for Spain, plus a quota of 500,000 MT of corn for Portugal. Amounts are reduced by any quantity of grain substitutes (e.g., starch residues and citrus pulp) imported during the same year. Flint corn is not permitted to be included within these concessions. Regulation 2020/760 has amended the management of this scheme. Since April 1, 2021, the former bidding system was replaced by the automatic fixation of zero duty (TRQ) from April 1 of each year (i.e., the normal import regime would apply from January 1 until March 31).

Intervention Mechanism: Regulation (EU) 1308/2013 (Common Market Organization Regulation) allows the EU to intervene in markets by purchasing grains from farmers and traders at an intervention price. Selling into intervention is aimed to be the market of last resort for farmers and traders. Since January 1, 2023, intervention purchases may be made between October 1 and May 31 for common wheat and throughout the year for durum wheat, barley, corn, and paddy rice. Grain held in intervention stores is disposed of mainly through sale by tender onto the domestic market or for export, although a proportion may be released for the most deprived people in the EU. Each year the Commission must publish details of the conditions under which products bought in under public intervention were bought or sold in the previous year. In practice, no grains have been held in intervention since 2010.

EU Trade Measures in Response to the War in Ukraine[38]

Since February 2022, the war in Ukraine, continues to put pressure on global food security as both countries are major exporters of feed and grains products. The grains sector has been impacted by disruption in trade flows and increased input prices, such as energy, fertilizers, and pesticides. Since the beginning of the war, the EU has tried to respond to the disruptions in the supply chains for agricultural products, especially grains and feed.

On June 6, 2024, Regulation (EU) 2024/1392 entered into force. The Regulation renews autonomous trade measures (ATM) for Ukraine which suspends all customs duties and quotas for Ukrainian products entering the EU until June 5, 2025. The Regulation also includes a safeguard mechanism which obliges the Commission to reintroduce quotas if imports of poultry, eggs, sugar, oats, maize, groats and honey exceed the arithmetic mean of quantities imported in the second half of 2021, in 2022 and in 2023. The EU has announced that it is unlikely the ATM will be renewed for another year. Discussions are ongoing with Ukraine to amend the existing Free Trade Agreement.

On June 19, 2024, the EU adopted Regulation (EU) 2024/1726 which introduces tariff quotas for Ukrainian oats imported into the EU because imports since the beginning of 2024 triggered the new safeguard mechanism. The quota for oats is set at 4,000 MT. Above this volume, most-favored nations (MFN) duties will apply until the end of 2024. At the Member State level, reactions include:

- **Hungary:** maintains its unilateral import ban on grain imports from Ukraine and expanded the restrictions (including further products of 23 tariff lines) as of September 16, 2023.
- **Romania:** Ukrainian grain transit is allowed through Romania, but the import of several commodities – including wheat, wheat flour, corn, is subject to a complicated import licensing procedure which discourages any potential importer to pursue this activity. The ordinance is in place until the end of July 2025, likely to be prolonged beyond that date.

[38] On August 21, 2024, Ukraine introduced procedures for the approval of minimum export prices for selected bulk commodities, including grains, oilseeds, vegetable oils and meals, walnuts, and honey. Additional information can be found in the GAIN Report entitled Minimum Export Prices for Selected Bulk Commodities by Ukraine.
Similarly, the Ministry of Agrarian Policy and Food of Ukraine signed a memorandum of understanding (MOU) with Ukrainian trade and industry organizations on July 15, 2024. The MOU intended to establish a wheat export cap for local marketing year MY 2024/25 (July 2024--June 2025). Additional information can be found in the GAIN Report Grain and Feed Quarterly – Ukraine. Since February 2025, Ukraine has a regulatory procedure in place enabling its Competent Authority to exchange digital phytosanitary certificates through the IPPC ePhyto Hub with other participants of this system.

Increased Tariffs on Russian and Belarusian Grains

On May 30, 2024, the European Union adopted Council Regulation (EU) 2024/1652 which increases the tariffs on imports into the EU of wheat, rye, maize, sorghum, and other products from Russia and Belarus. In addition, Russia and Belarus will no longer have access to any of the EU's World Trade Organization (WTO) quotas on grain that offer better tariff treatment for some products. These measures concern products originating in or exported directly or indirectly from Russia and Belarus to the EU. They do not affect transit through the EU from both countries to other third countries. These measures entered into force on July 1, 2024.

On January 28, 2025, the European Commission proposed to increase 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 Russia and Belarus. The list includes oats, rice, products of the milling industries (malt, starches, inulin, wheat gluten), and cereal flour.

Provisions affecting U.S. Grains and By-Products Exports to the EU

Certificates used in U.S-EU grain and products trade: Trade of certain agricultural products between the United States and the EU has historically required that the products are accompanied by documents that certify the implementation of certain formalities (so-called 'non-customs formalities) under the EU agricultural legislation. These documents have so far been handled in paper format. The Commission intends to digitize the whole process by establishing an electronic system for DG AGRI non-customs formalities, known as ELAN. The European Commission services are drafting the specification for this future EU electronic system which will cover the following certificates used in U.S-EU grain and products trade:

- Rice Export Certificate issued by the United States of America Association for the Administration of Rice Quotas.
- Certificate of Conformity for Wheat issued by the Federal Grain Inspection Service (FGIS).
- Certificate of Conformity for Malting Barley issued by the Federal Grain Inspection Service (FGIS).
- Certificate of Conformity and Commodity Inspection Certificate for Corn Gluten Feed issues respectively by the Federal Grain Inspection Service (FGIS) and the U.S. wet milling industry.

EU retaliation on U.S. Section 232 Safeguard Measures on EU Steel and Aluminum Temporary Suspension: 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. In December 2023, the EU announced a 15-month extension of the truce until March 31, 2025. According to Regulation (EU) 664/2025, the suspension period has been extended to April 14, 2025.

On March 12, 2025, the United States reimposed tariffs of up to 25 percent on imports of steel, aluminum, and certain products containing steel and aluminum from the European Union. In response, the European Union announced additional 25 percent retaliatory tariffs affecting several agricultural products. While these tariffs were initially intended to enter into force in three stages,[39] they are now on hold for more 90 days to, according to a media statement from European Commission President Ursula von der Leyen, "*give negotiations a chance.*" Consequently, the retaliatory duties would only enter into force in mid-July.

U.S.-EU WTO Cases on Aircraft Subsidies: On November 9, 2020, the European Union announced retaliatory tariffs against U.S. exports following the WTO ruling that authorized the EU to take such countermeasures due to U.S. subsidies to aircraft maker Boeing. The European Commission published Implementing Regulation 2020/1646 that outlined the list of products subjected to a 25 percent additional tariff. The Regulation entered into force on November 10, 2020. Wheat other than durum were listed. In June 2021, the European Union and the Unites States reached an understanding in the large civil aircraft dispute. On July 9, 2021, the European Commission adopted Implementing Regulation (EU) 2021/1123 suspending the application of tariffs until July 11, 2026.

[39] As it pertains to grains and grain by-products: April 15, 2025, for corn, milled, semi-milled and broken rice; May 16, 2025, for durum wheat, durum wheat flour, rye, barley, oats, round grain husked [brown] rice, medium grain husked [brown] rice, long grain husked rice and flour of common wheat, spelt and Dried Distillers Grains.

EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several FTAs with other countries and regions, which include concessions on oilseeds. Additional information is available on the EC website.

New Zealand: On May 1, 2024, the trade agreement between the European Union and New Zealand entered into force. The trade agreement removes all tariffs at entry into force on EU agri-food exports to New Zealand. However, this is not the case for all agri-food imports into the EU, with tariffs rate quotas for some products such as sweetcorn with a TRQ of 800 MT at zero duty. More information about the agreement can be found here.

Mercosur: On December 6, 2024, the European Commission announced that President von der Leyen and her counterparts from four Mercosur countries (Brazilian President Lula, Argentinian President Milei, Paraguayan President Peña, and Uruguayan President Lacalle Pou) finalized negotiations and reached a political agreement for an EU-Mercosur partnership agreement. In 2019, the European Commission reached a preliminary agreement with Mercosur countries, but amendments were made to several sectors, including agriculture. The agreement includes a bilateral safeguard clause in case increased imports cause - or even threaten to cause - serious injury to relevant sectors, including agricultural sectors. This safeguard clause also covers imports under tariff rate quotas in the agreement. The text still needs to be formally approved by the European Parliament and the EU Member States. Under the agreement, there is a gradual phase out of duties on 91 percent of EU exports to Mercosur and 92 percent of Mercosur exports to the EU. For grains, this includes an elimination of tariffs for EU exports of malt to Mercosur countries. Mercosur countries will be allocated new TRQs with a five-year phase in period:

- 1 million MT of maize and sorghum
- 600 MT of sweet corn (CN codes 20019030, 20049010, 20058000)
- 60,000 MT of rice

Mexico: On January 17, 2025, the EU and Mexico announced the conclusion of a new Free Trade Agreement. As with the agreement with Mercosur, the text still needs to be formally approved by the European Parliament and the EU Member States. The agreement abolishes customs duties for most goods, including agricultural products. Additionally, Mexico will be allocated new TRQs with a five-year phase in period, including a TRQ for 1,800 MT of maize starch.

EU Rice Import Policy

Exports of rice to countries outside the EU are mostly subject to the issuance of an export license. Period of validity is until the end of the second month following application. Rice products for which an import license is required are as follows:

Table 14. Rice Import Tariffs to the EU

HS Code	Type of Rice	Duty (Euros/MT)	Security (Euros/MT)
100610	Rice in The Husk (Paddy or Rough)	211	30
100620	Rice Husked (Brown)	30	30
100630	Milled rice	175	30
100640	Milled rice, broken kernels	65	1

Source: TARIC.

According to Commission Implementing Decision 2011/884 on emergency measures regarding unauthorized genetically modified rice in rice products originating from China, since January 1, 2015, rice imports from China must be accompanied by a safety certificate and an analytical report showing that the products have been tested free from the presence of non-authorized GMOs.

Between January 2019 and January 2022, as a temporary measure to help protect EU farmers from competitively priced long grain rice, Commission Implementing Regulation 2019/67 allowed the EU to impose safeguard measures to imports of Indica rice originating in Myanmar and Cambodia. During this three-years' timeframe, tariffs amounted to 175 Euros/MT, 150 Euros/MT, and 125 Euros/MT in 2019, 2020, and 2021 respectively. Since January 2022, these duties reverted to zero. On November 9, 2022, the European Court of Justice (ECJ) issued a ruling cancelling the Commission Implementing regulation that allowed the EU to impose safeguard measures on imports from Cambodia and Myanmar.

From March 7, 2025, under Commission Implementing Regulation 2025/475 the import duty for husked rice under HS Code 100620, other than husked basmati rice of the varieties referred to in Article 2(1) of Commission Delegated Regulation (EU) 2023/2835 shall be 30 Euros/MT.

A summary of the EU's preferential rice import regimes can be found in Table 15.

Table 15. EU Rice Import Preferential Regimes

Regulation	Origin	Type of rice	Quantity (MT)
Regulation 2020/8761	All origins except the United Kingdom	100620	1,416 MT
	United States Thailand Australia India Pakistan Other origins	100630	80,175 MT
	United States Thailand Australia Guyana Other origins	100640	83,401 MT
	All origins except the UK		28,360 MT
Regulation (EC) 539/2014	Bangladesh	100610, 100620 and 100630	Equivalent to 4,000 MT of husked rice
Regulation 2023/2835	All	Basmati (10062017 &10062098)	No limit[40]
Regulation 978/2012	EBA countries	1006	No limit
Regulation 449/2010 *(First come first served basis)*	Egypt	• 100620 • 100630 • 100640	• 23,185 MT • 81,149 MT • 92,742 MT
Vietnam FTA	Vietnam (from 2018)	100610 & 100620 100630100610, 100620 &100630	20,000 MT husked rice equivalent 30,000 MT MRE 30,000 MT of fragrant rice*[41] MRE
Colombia and Peru FTA	Peru	1006	40,800 MT
Regulation (EC) 924/2013	Central America (Nicaragua, Panamá, Honduras, Costa Rica, El Salvador, Guatemala)	100620 and 100630	23,000 MT (in 2017)

Source: FAS based on EU law.

**Export Certificate required / ** Certificate of Authenticity required.*

[40] Certificate of Authenticity required.
[41] Export Certificate required.

Abbreviations used in this report

CY	Calendar year
e	Estimate (of a value/number for the current, not yet completed, marketing year)
EC	European Commission
EP	European Parliament
EU	European Union (Current EU-27, without the UK).
f	Forecast (of a value/number for the next, not yet started, marketing year)
FAS	Foreign Agricultural Service
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.
GE	Genetically Engineered
Ha	Hectares
HRI	Hotels, Restaurants, and Institutions
IPAD	International Production Assessment Division
FSI	Food, Seed, and Industrial
MMT	Million Metric Tons
MRL	Maximum Residue Limits
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
TDM[42]	Trade Data Monitor LLC.
TY	Trade Year. July to June for wheat, October to September for coarse grains, and January to December for rice
UK	United Kingdom
U.S.	United States

[42] 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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Related Reports

Title	Date
EU Grain and Feed Fall Update 2024	04/12/2024
EU Grain and Feed Summer Update 2024	08/05/2024
EU Grain and Feed Annual 2024	04/17/2024

Attachments:

No Attachments