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GAIN Global Agricultural Information Network

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Report Name: Excessive Rain and Heat Drive Down Grain Output in Spain

Country: Spain

Post: Madrid

Report Category: Grain and Feed

Prepared By: Marta Guerrero

Approved By: Evgenia Ustinova

Report Highlights:

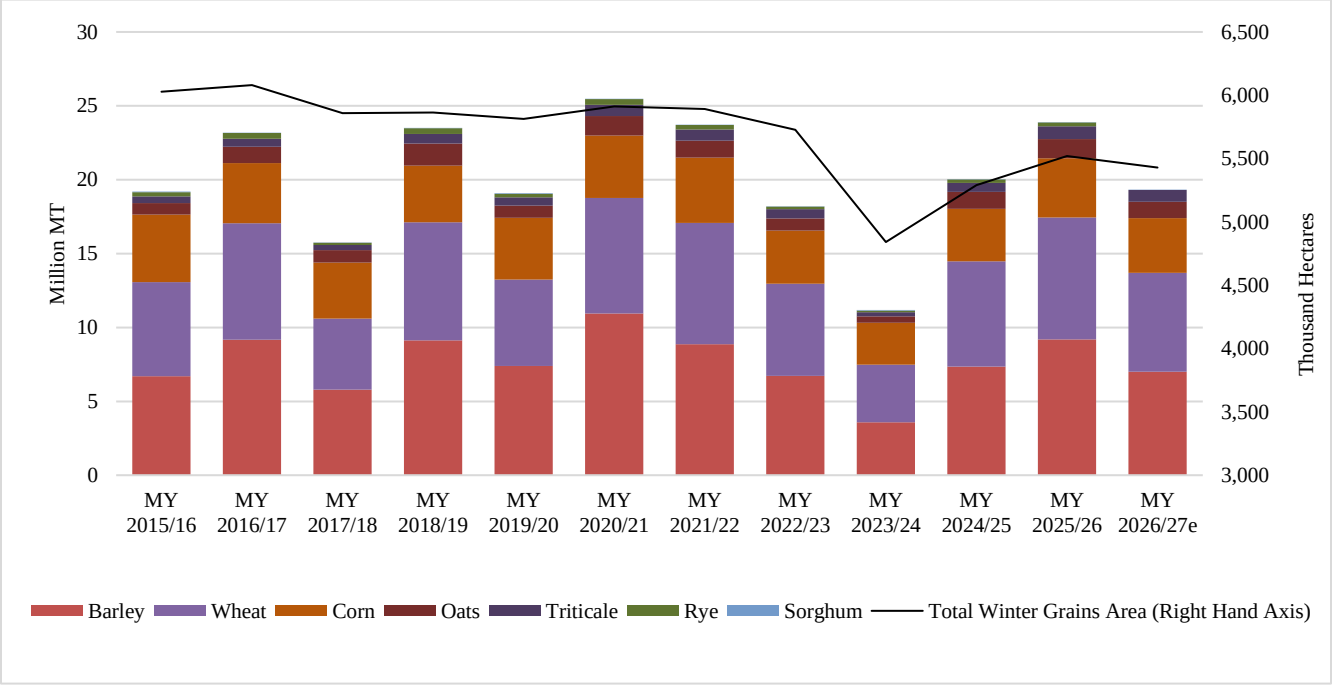
Spain's grain crop is revised down for MY 2026/27, coming off the second largest crop on record registered in MY 2025/26. The forecast considers lower area planted to winter grains, excessive precipitation at the beginning of 2026, and above average temperatures during grain filling stage. Despite lower crop volume and steady demand, imports are expected to remain relatively flat given the ample initial grain stocks.

Area

In MY 2026/27, according to the latest official estimates[1], Spanish farmers marginally reduced their winter grain plantings, which are estimated to amount to 5.1 million Hectares (Ha), down from the 5.2 million registered in MY 2025/26 (Figure 1). This reduction reflects two converging trends: a longer-term shift by farmers toward higher value crops such as tree crops, and a near term decision by some farmers to redirect acreage toward spring grains plantings, such as corn, in response to ample irrigation water supplies (Figure 2).

However, soaring fertilizer and fuel prices since February 2026 have squeezed farmer margins, prompting a switch away from corn toward less input intensive crops such as sunflowers, as well as careful optimization of their fertilizer stocks. This shift is expected to impact not only grain production volumes but also protein content of harvested grains. According to Post projections, Spain's grain corn plantings are expected to stay at similar levels to the 320 thousand Ha registered in MY 2025/26.

Figure 1. Spain's Grain Area and Production



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

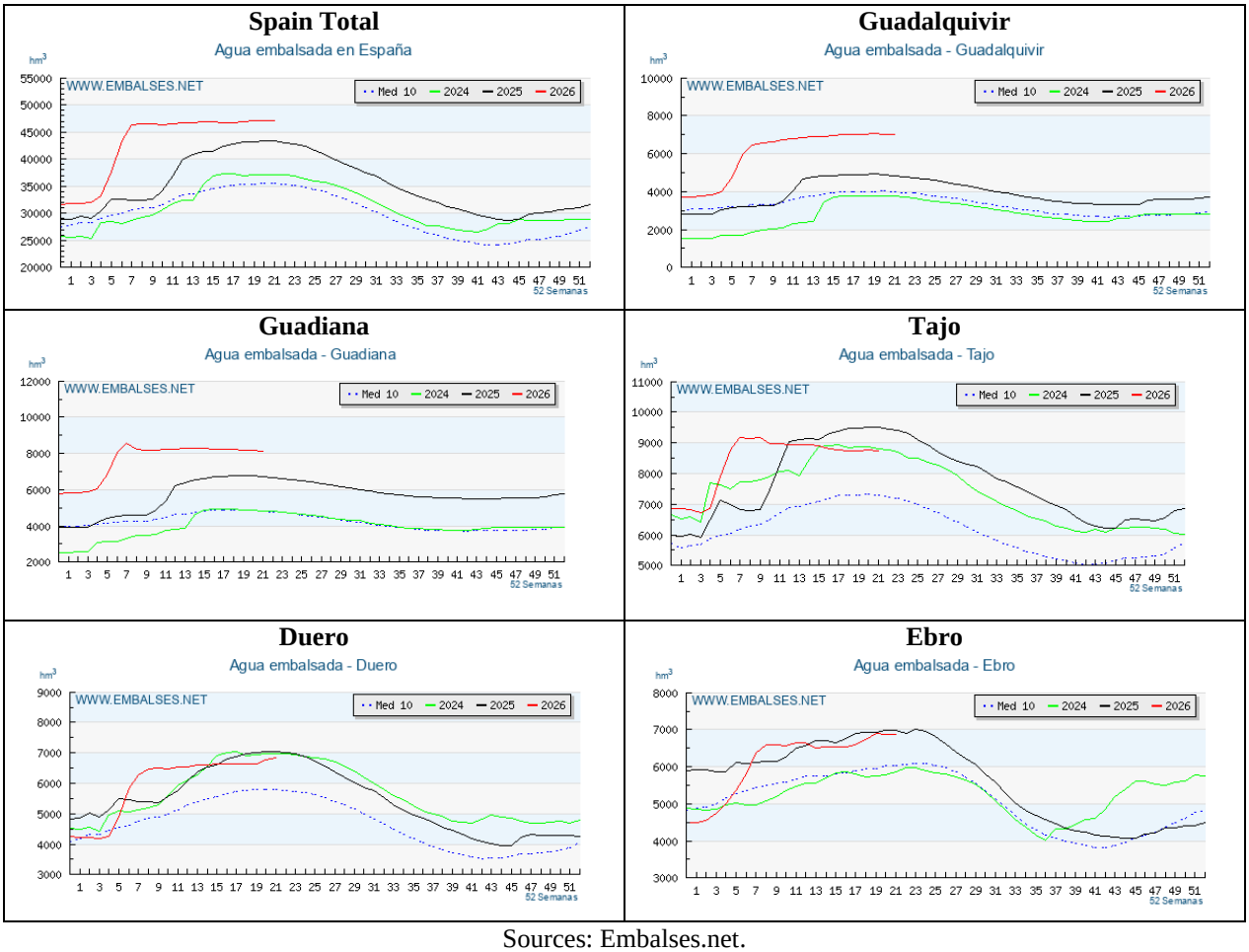
In Spain, early fall was marked by the absence of precipitation, which resulted in planting delays and, in some instances, grains being planted under dry conditions. The return of rains since November contributed to a good, albeit delayed, winter crop establishment. December rainfall improved water reserves and significantly improved soil moisture in key Spanish grain producing regions of Andalusia, Aragon, Castile and León, Castile-La Mancha. However, persistent precipitation and floodings during

[1] Ministry of Agriculture, Fisheries and Food. February release.

Q1 2026 preempted short-cycle winter grains plantings, as well as limited access to fields to carry out treatments or fertilizing operations.

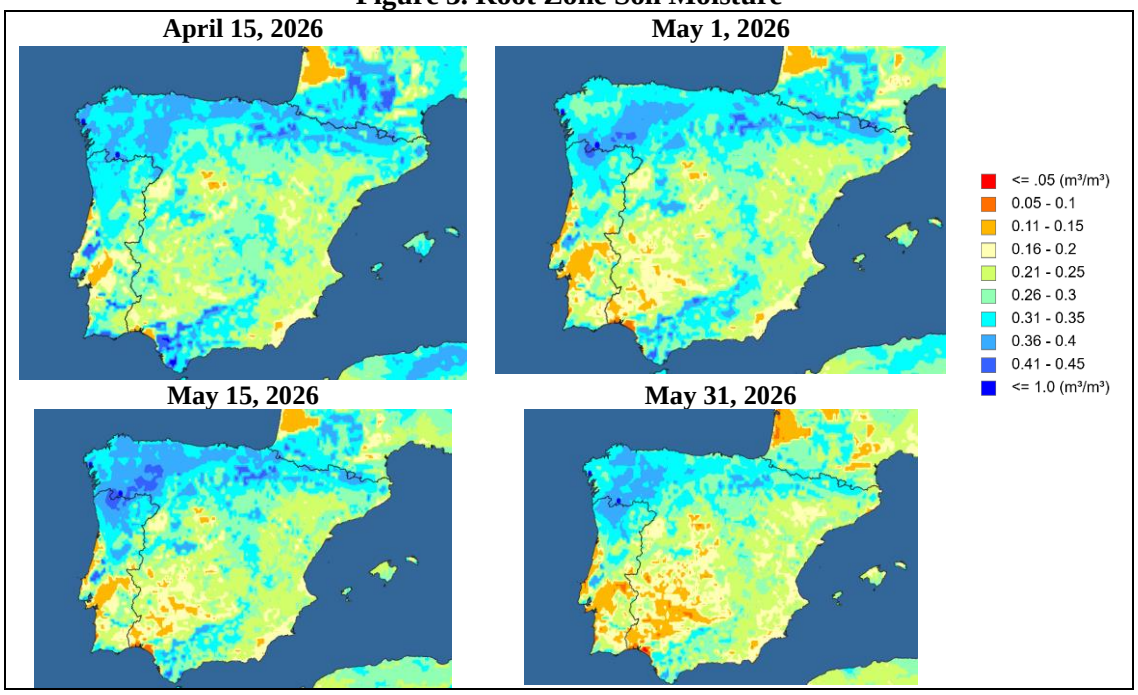
Favorable moisture conditions from late fall onward preempted deeper root development, as water was readily available on the surface. When dry conditions set in during April, the crops – already weakened by poor root development - struggled to cope, which resulted in stunted plant growth and premature head formation, particularly in Spain's central region. Precipitation in the first half of May arrived too late, only partially countering the impact of April's dry spell on yields. A heat wave in the second half of May then dealt a further blow, overlapping with winter grains flowering and filling stages, sharply curtailing yield expectations across most grain producing regions.

Figure 2. Spain Total and River Basin Water Reservoir Levels



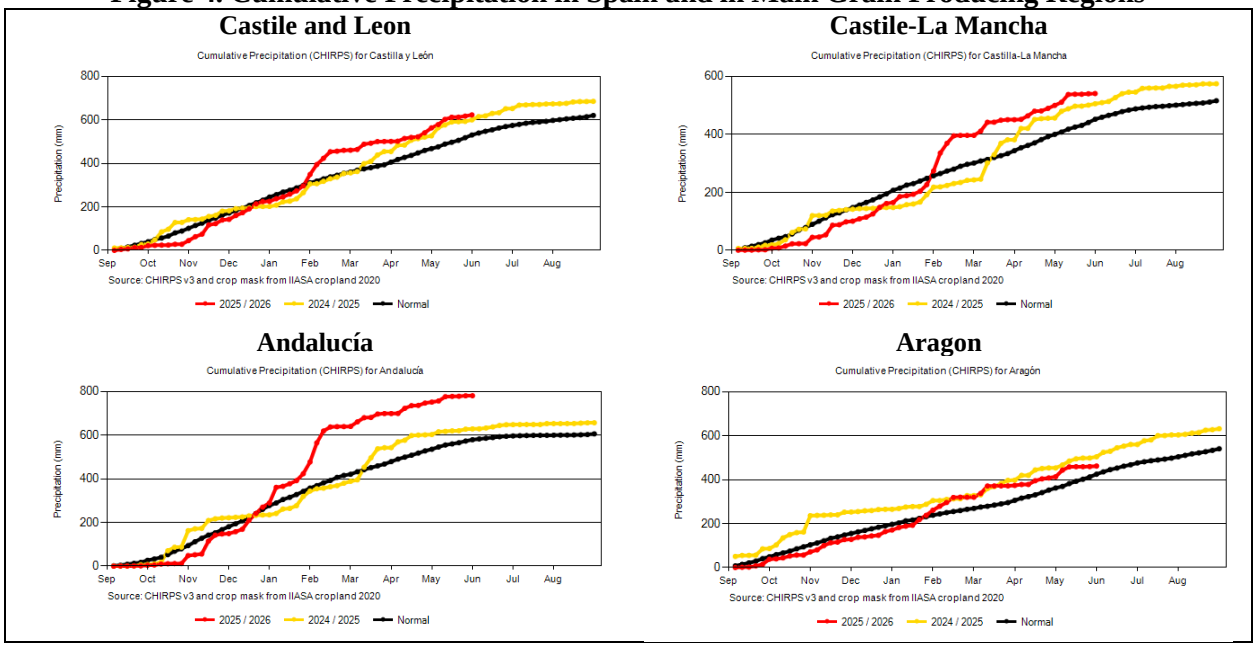
Sources: Embalses.net.

Figure 3. Root Zone Soil Moisture



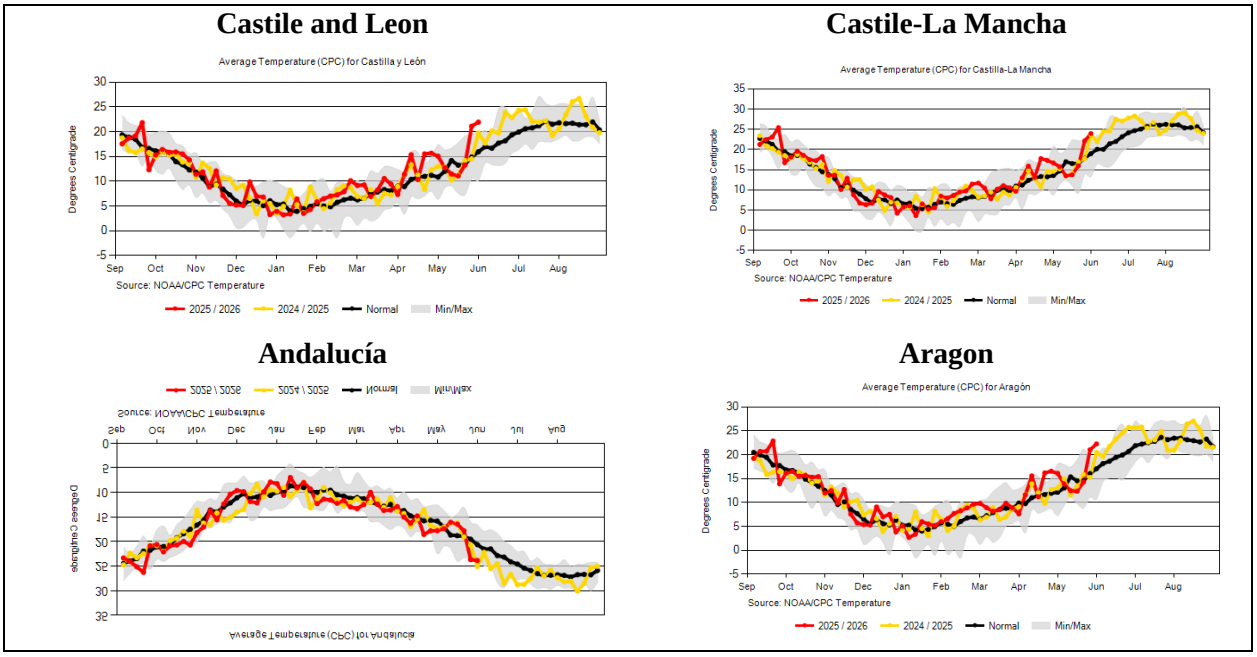
Source: IPAD/Foreign Agricultural Service/USDA.

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



Source: IPAD/Foreign Agricultural Service/USDA.

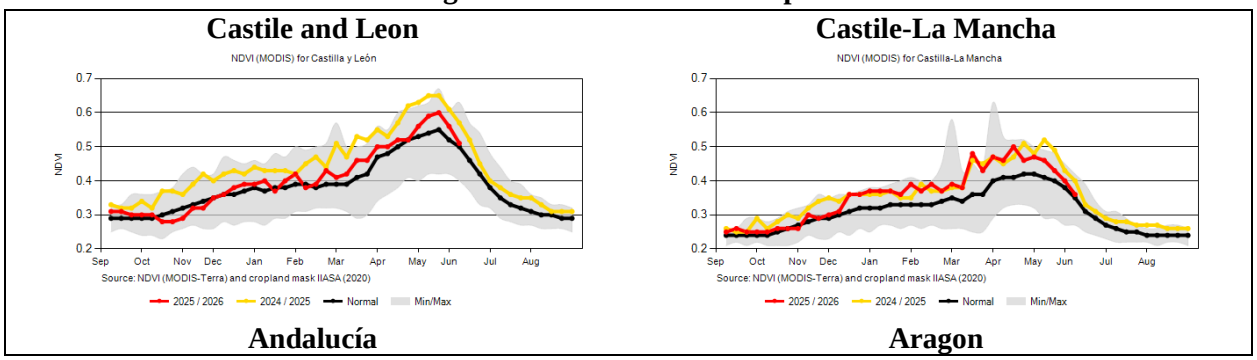
Figure 5. Average Temperatures in Main Grain Producing Regions

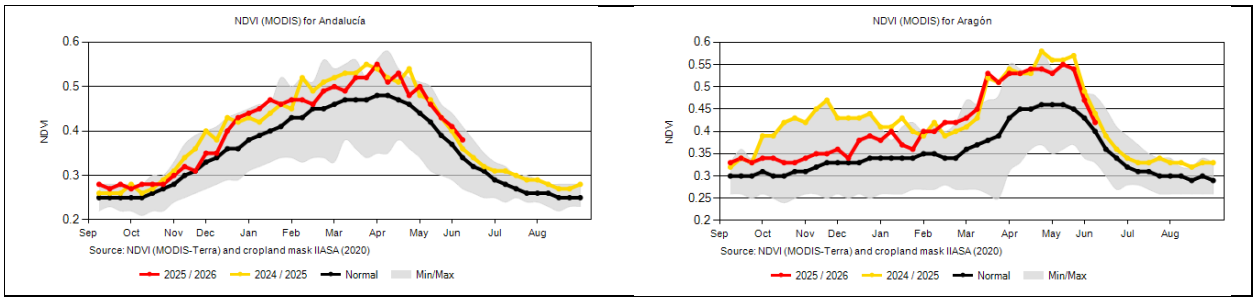


Source: IPAD/Foreign Agricultural Service/USDA.

The Normalized Difference Vegetation Index (NDVI) in Spain's major grain producing regions was over average and in line with second-to-record MY 2024/25 until mid-May. In some regions such as Aragon, MY 2025/26 NDVI was consistently and significantly above the long-term normal NDVI throughout the entire crop year, indicating that MY 2025/26 represents one of the strongest vegetation seasons on record for Aragon's croplands. Conversely, in Castile la Mancha and Castile Leon, April's dry spell followed by May's heat wave negatively impacted NDVI levels, resulting in downwards yield corrections.

Figure 6. Seasonal NVDI in Spain





Source: USDA/NASA GLAM.

Production

Post projects that production will be well below last year's figure but stay at similar levels to the 5-year average. In the case of corn, virtually all is grown under irrigation, hence yields are very stable. However, the combination of lower area, fertilizer optimization, and challenging planting conditions are expected to lead to an overall lower crop. Assuming average yields in a larger corn area, grain corn production is expected at 3.7 MMT, which would bring the total grain crop below 20 MMT.

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

Crop	MAPA	Ag Coops	ACCOE	FAS Madrid
Date Released	**Feb 2026**	**May 26, 2026**	**June 4, 2025**	**June 8, 2026**
Wheat	7,257	7,030	6,271	6,700
Soft	6,646	6,532	5,767	6,200
Durum	611	498	504	500
Barley	8,180	7,568	7,051	7,000
Oats	1,172	1,176	1,080	1,100
Rye	230	227	249	225
Triticale	785	828	791	800
Winter Grains	17,624	16,829	15,444	15,825
Corn	N/A	3,728	N/A	3,700
Total Grains	22,499	20,557	N/A	19,525

Sources: Provisional estimations by: MAPA (Spanish Ministry for Agriculture, Fisheries and Food), ACCOE (National Grain Elevators), Agricultural Cooperatives and FAS Madrid estimates.

In **Andalucia**, torrential rains during fall and winter improved water reservoirs levels (Figure 2 and Figure 4), but also caused flooding conditions during the first months of the year, delaying plantings and shortening the crop cycle. In areas with clay soil - and less so in sandy soils- prolonged waterlogging jeopardized crops establishment and, in some instances, caused root asphyxia, preempting grain plants from achieving full yielding potential. The dry period in April combined with abnormally high temperatures recorded as of the second half of May (Figure 3) have significantly reduced yields dampening harvest expectations. Adverse conditions in the region of Andalucía - where the bulk of Spanish durum wheat production takes place - are particularly detrimental for this grain's output.

In **Castile-La Mancha,** the grain crop presents uneven conditions. In terms of NDVI, while initially very positive (Figure 6), conditions deteriorated sharply when the heat wave in late May hit the crop. High temperatures in late spring are expected to reduce yields and specific grain weight, particularly in

the case of wheat as the heat wave hit the crop during the grain filling phase. In the case of barley, whose cycle is comparatively shorter than wheat, the crop had already passed the most vulnerable phases when the abnormally high temperatures took hold.

Castile and León, Spain's largest grain-producing region, is a later-season cereal-producing area and largely oriented to barley production. In this region, heat overlapping with grain filling is causing significant concern of shivering damage among the producers. While barley is expected to witness significant yield reduction, it is wheat that has suffered a much steeper reduction in yield expectations.

Conversely, in **Aragon**, despite the pullback compared to the over average yields recorded in MY 2025/26, a combination of saturated soils and the wide adoption of no-till farming have enabled the plants to cope with the late-spring heatwave better than in other producing regions (Figure 6).

Consumption

Feed is the main driver of Spain's grain consumption. Animal health outbreaks - such as the ongoing incidence of African Swine Fever (ASF) in Catalonia - are expected to negate expansion of feed production in MY 2026/27. Swine feed in Spain accounts for over 50 percent of feed production. The evolution of the disease, as well as the Spanish administration in reopening markets is expected to determine swine feed demand evolution. The uncertainty generated by ASF in wild fauna has resulted in a decline in piglet imports in Q1 2026, which will preempt additional demand down the road. On a positive note, in May 2026 Philippines recognized regionalization (Table 2) and will re-start importing pork products from Spain. Also, grain demand for poultry feed production is expanding. Similarly, food and bioethanol grain consumption remains steady.

Table 2. Export Markets Status Regarding ASF Outbreak in Spain

<table>
<tr><th colspan="4">Destination</th><th>Market Reaction</th><th>Assessment</th></tr>
<tr><td rowspan="14">Spain Pork Production in 2024 (4.9 TMT)</td><td colspan="3">Domestic Consumption (2.45 TMT)</td><td>Regionalization accepted</td><td rowspan="8">4.5 TMT of production protected</td></tr>
<tr><td rowspan="13">Total Exports (2.45 TMT)</td><td colspan="2">Exports to the EU (1.45 TMT)</td><td>Regionalization accepted</td></tr>
<tr><td rowspan="12">Extra EU Exports (1 TMT)</td><td>United States (15 TMT)</td><td>Regionalization accepted</td></tr>
<tr><td>South Korea (96 TMT)</td><td>Regionalization accepted</td></tr>
<tr><td>Serbia (31 TMT)</td><td>Regionalization accepted</td></tr>
<tr><td>China (309 TMT)</td><td>Regionalization accepted. Exemptions for certain products in place.</td></tr>
<tr><td>United Kingdom (64 TMT)</td><td>Regionalization accepted.</td></tr>
<tr><td>Philippines (59 TMT)</td><td>Regionalization accepted.</td></tr>
<tr><td>Malaysia (26 TMT)</td><td>Market closure</td><td rowspan="4">400 TMT of production potentially exposed</td></tr>
<tr><td>Taiwan (21 TMT)</td><td>Market closure</td></tr>
<tr><td>Japan (242 TMT)</td><td>Market closure</td></tr>
<tr><td>Others (114 TMT)</td><td>N/A</td></tr>
</table>

Source: FAS Madrid based on various Media outlets and Trade Data Monitor, LLC (TDM) for 2024.

Trade and Stocks

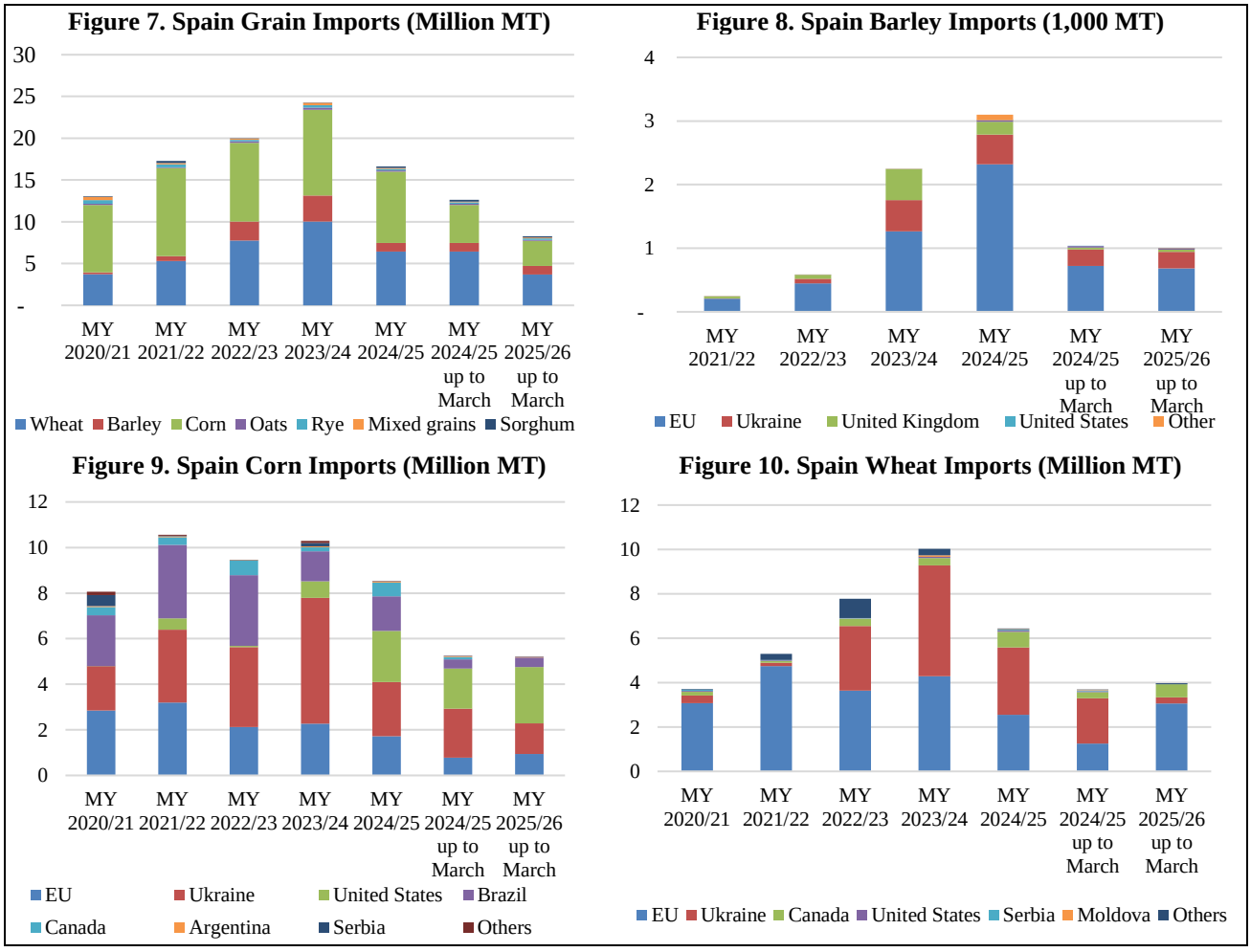
Spanish wheat and barley stocks are expected to decrease in MY 2026/27 as production plumets to below average bringing down the bumper levels of stocks estimated at the end of MY 2025/26. The impact of the shorter anticipated domestic supply in MY 2026/27 is expected to be countered by the

ample ending stocks of wheat and barley, which together with a somewhat weaker demand, are expected to result in stable import volumes, with Spain's total grain imports expected to amount to nearly 15 million MT.

Since MY 2025/26 the phase out of the Ukrainian preferential tariff regime - enacted for a set period at the start of the Rusia-Ukraine war - has resulted in a drastic reduction of wheat originated in third countries (Figure 10), yielding space to EU origin crop. The drastic reduction in domestic durum wheat output in MY 2026/27 is expected to trigger durum wheat imports by Spain, notwithstanding the fact that it traditionally had boasted a trade surplus for this type of grain.

With barley imports in MY 2025/26 relatively flat, it is corn that is filling the gap left by the reduced wheat imports. Since MY 2025/26, the United States has become a relevant supplier of sorghum and corn to the Iberian Peninsula. In MY 2025/26, U.S. corn shipments to Spain are performing at an accelerated pace resulting in imports well above last year's level. U.S. corn remains the most competitive supplier to Spain until Brazilian *safrinha* corn becomes available in summer following July harvest.

Figure 7. Spain Grain Imports



Source: FAS Madrid based on Trade Data monitor, LLC (TDM) Data.

Abbreviations used in this report

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

Attachments:

No Attachments.