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Report Highlights:

MY 2025/26 EU grain balance is marked by an abundant winter grains supply, allowing for exports recovery, particularly significant in the case of wheat. Conversely import needs are expected to decrease, leaving room for stock-building despite the steady internal demand.

Disclaimer: This report presents an updated outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2025/26. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the EU and is not official USDA data.

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Executive Summary

Table 1. Production, Supply and Distribution - Total Grains

Total Grains[1]	2023/2024		2024/2025		2025/2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	50,337	50,137	49,049	48,843	49,460	49,516
Beginning Stocks (1000 MT)	32,799	32,799	31,215	30,954	26,221	27,396
Production (1000 MT)	272,414	271,642	258,948	257,641	281,410	288,142
MY Imports (1000 MT)	34,736	34,737	30,765	30,648	27,780	28,020
TY Imports (1000 MT)	34,362	34,362	30,721	30,617	27,730	28,130
Total Supply (1000 MT)	339,949	339,178	320,928	319,243	335,411	343,558
MY Exports (1000 MT)	49,529	49,519	37,016	37,040	42,390	45,685
TY Exports (1000 MT)	49,438	49,438	37,944	37,964	42,190	45,385
Feed and Residual (1000 MT)	156,305	157,025	155,150	153,522	161,700	161,880
FSI Consumption (1000 MT)	102,900	101,680	102,541	101,285	103,391	102,350
Total Consumption (1000 MT)	259,205	258,705	257,691	254,807	265,091	264,230
Ending Stocks (1000 MT)	31,215	30,954	26,221	27,396	27,930	33,643
Total Distribution (1000 MT)	339,949	339,178	320,928	319,243	335,411	343,558

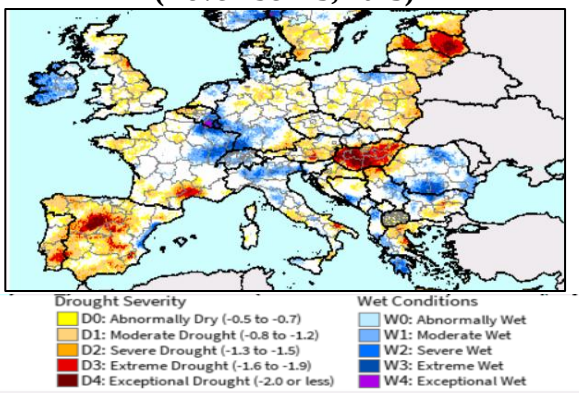
Source: FAS EU Posts.

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

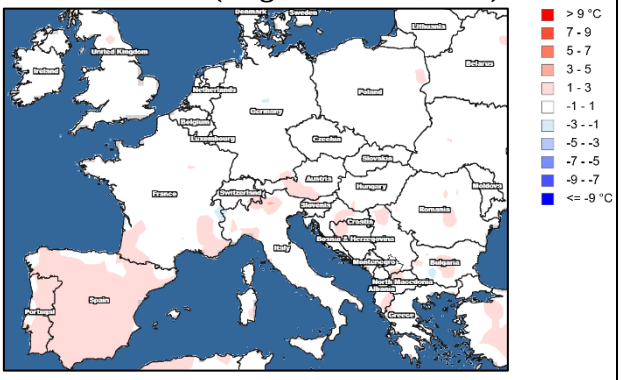
MY 2025/26 EU Grain Production

Total European Union (EU) grain production for MY 2025/26 is estimated at 288.1 MMT, up from the Post's summer estimate of 279.2 MMT, and up from the 257.7 MMT recorded in MY 2024/25. The revised estimate takes into account that summer conditions were extremely beneficial for winter crops development in the north and west EU member states (MS), whereas persistent summer drought and heat trimmed corn yields in the EU's southeast.

Map 1. Drought Severity (November 15, 2025)



Map 2. Average Temperature Departure from Normal (Aug 1 to Oct 31, 2025)



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

MY 2025/26 EU Grain Consumption Trends

Post revised up the EU's feed consumption for MY 2025/26 to 161.9 MMT. Post believes that feed demand in the EU remains strong despite the EU's livestock producers' struggle with animal diseases outbreaks[2], increasing regulatory pressure, and generational renewal[3].

MY 2025/26 wheat share in feed rations is projected to increase compared to the previous season. Post projection is based on somewhat lower than anticipated EU corn crop resulting from severe dry conditions in main EU producers such as Bulgaria and Romania and the reduced availability from Ukraine, as its supply is now subject to import quotas. Similarly, uncertainties surrounding the potential implementation of new certification requirements envisioned in the EU Deforestation Regulation (EUDR) also benefit protein-rich grains such as wheat compared to corn or barley, whose protein content is lower.

[2] Ranging from African Swine Fever (ASF) and Porcine Reproductive and Respiratory Syndrome (PRRS) in the case of the swine herd, Blue Tongue (BT) and Epizootic Hemorrhagic Disease (EHD) and Lumpy Skin Disease (LSD) in cattle, and Highly Pathogenic Avian Flu (HPAI) in poultry.

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

Figure 1. EU Milling Wheat Prices (Euros/MT)

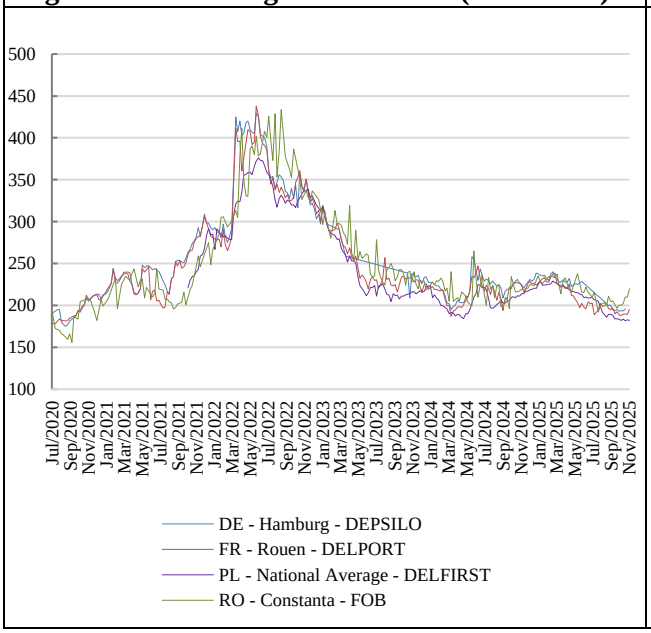
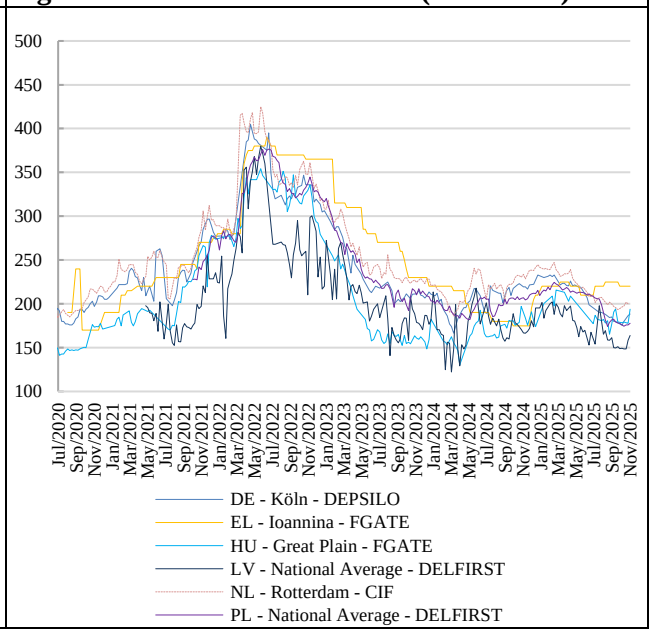


Figure 2. EU Feed Wheat Prices (Euros/MT)



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

Figure 3. EU Corn Prices (Euros/MT)

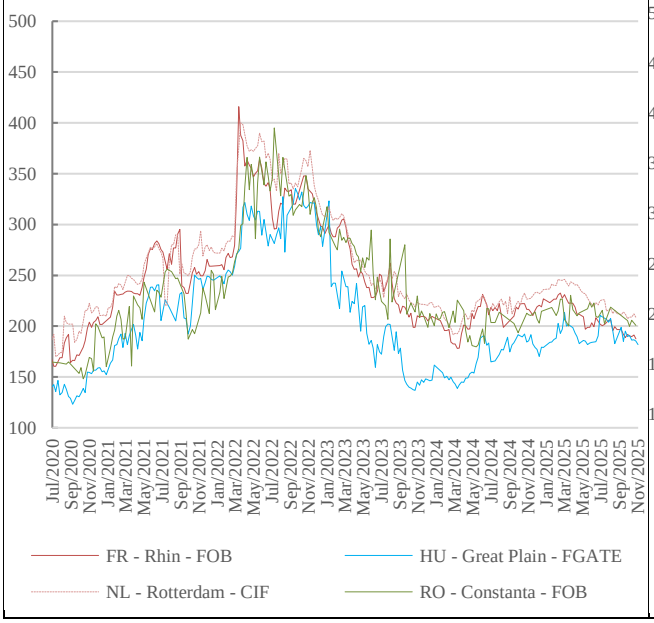
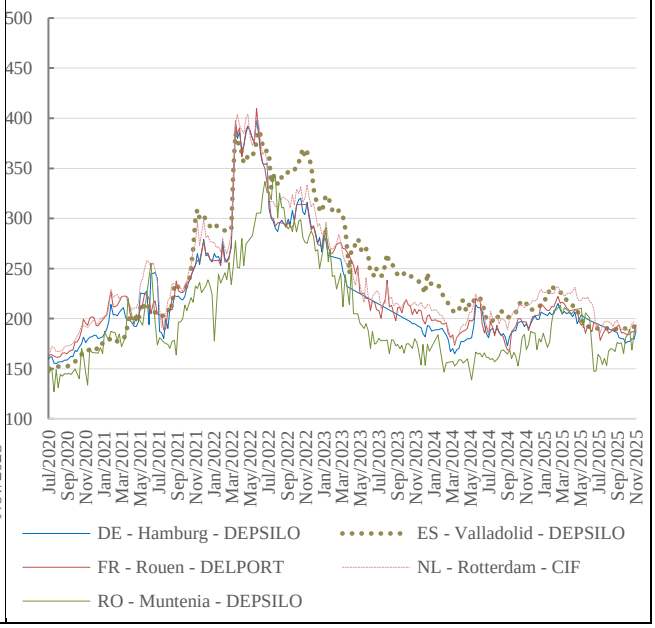


Figure 4. EU Feed Barley Prices (Euros/MT)



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

Food, Seed, and Industrial (FSI) uses in MY 2025/26 are up slightly on the levels in MY 2024/25 due to increased HRI-driven uses, as well as new for grain-based industrial products such as starch, maltodextrin, glucose, ethanol,[4] DDGS and gluten.

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

MY 2026/27 EU Trade and Stocks Trends

MY 2025/26 EU abundant grains supplies are expected to reduce the bloc's import needs. In MY 2024/25, due to limited availability of Ukrainian grains, EU grain importers increasingly sought alternative suppliers such as the United States. In fact, in MY 2024/25, the United States surpassed Brazil becoming the EU's second largest corn supplier. Post anticipates that Ukraine grain supply will remain constricted, as the EU restored its tariff quotas for Ukrainian grain and other agricultural products on June 6, 2025, following the end of temporary trade liberalizations. However, currently, there is no EU duty in place for corn imports.[5]

Conversely, EU's grain exports are expected to recover from the disappointing levels registered in MY 2024/25. Post estimate accounts for France's regained competitiveness and ample domestic availability, which should offset the reduced corn export stemming from poor harvests in Romania and Bulgaria.

MY 2025/26 ending stocks for wheat, barley, oats, and mixed grains are expected to increase significantly given the ample EU winter grain crop across the EU, in particular in the northeast producing MS such as Germany and Poland. Conversely stocks for corn are expected to stay below MY 2024/25, with constrained levels in southeastern EU countries - Romania and Bulgaria- offsetting the more ample supplies in other EU MS.

MY 2026/27 EU Winter Grain Plantings

Rainfall delayed planting in some areas in the central and east EU MS - Austria, South-West of Germany, Poland, Romania, Bulgaria- while at the same time improving soil moisture. In the west of EU -France, Italy, Spain and Portugal- dry conditions prevailed in the first weeks of fall, forcing farmers to plant in dry land or delay plantings till the long-awaited precipitation arrived in the second half of October. Early estimates indicate that EU farmers may continue to opt to increase their winter grains plantings in MY 2026/27 considering the disappointing results obtained in terms of summer grain yields. All in all, overall conditions supported expanded wheat and barley areas for MY 2026/27. Warmer than average temperatures across the EU secured good initial crop development.

[5] For additional information regarding EU grain duties calculation, please consult the Policy Section in the EU Annual Grain and Feed Report 2025.

Section I. Wheat

Table 2. Production, Supply and Distribution - Wheat

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	24,320	24,270	22,740	22,700	23,885	24,000
Beginning Stocks (1000 MT)	16,268	16,268	15,790	15,740	11,714	13,320
Production (1000 MT)	135,375	135,180	122,147	121,015	142,300	144,630
MY Imports (1000 MT)	12,659	12,659	10,646	10,646	5,500	6,950
TY Imports (1000 MT)	12,659	12,659	10,646	10,646	5,500	6,950
Total Supply (1000 MT)	164,302	164,107	148,583	147,401	159,514	164,900
MY Exports (1000 MT)	38,012	38,012	27,869	27,869	33,000	35,900
TY Exports (1000 MT)	38,012	38,012	27,869	27,869	33,000	35,900
Feed and Residual (1000 MT)	46,500	47,480	45,000	43,602	49,000	48,330
FSI Consumption (1000 MT)	64,000	62,875	64,000	62,610	64,500	63,120
Total Consumption (1000 MT)	110,500	110,355	109,000	106,212	113,500	111,450
Ending Stocks (1000 MT)	15,790	15,740	11,714	13,320	13,014	17,550
Total Distribution (1000 MT)	164,302	164,107	148,583	147,401	159,514	164,900
Yield (MT/HA)	5.5664	5.5698	5.3715	5.3311	5.9577	6.0263
(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.

MY 2025/26 EU wheat crop is projected to reach 144.6 MMT, significantly up from MY 2024/25 and Post's July estimate. This rebound is attributed to favorable weather conditions throughout the growing season compared to previous season, leading to better-than-expected yields in most EU countries. The production rebound is particularly sharp in the case of France, Germany, and Poland.

The French wheat crop bounced back from the record low registered in MY 2024/25. Weather conditions were good at planting; no winterkill was reported and rainfall was sufficient, which combined with good levels of underground water, ensured that the crop had enough water. Fewer diseases, especially fungal diseases, were reported due to the dry period during flowering. The quality of the French wheat crop in 2025 is generally considered very good to excellent, for both soft and durum wheat, according to analyses. MY 2025/26 French soft wheat is distinguished by high-quality protein, good specific weights, a good elasticity index, and above-average baking results. For durum wheat, despite slightly lower protein levels compared to previous years, the technological quality remains satisfactory with very good specific weights.

Similar good growing conditions ensured that the MY 2025/26 German wheat crop volume also increased sharply from the record low MY 2024/25 level. The average protein content of the German wheat is estimated at 12.2 percent for the MY 2025/26 crop. This is the first time in four years that the average protein content exceeds 12 percent.

In Poland wheat production in MY 2025/26 increased to a record level of 14 million MT, up from MY2024/25 levels. Despite unfavorable conditions in early spring, the winter wheat crop benefited from rain in late May which boosted yields. The Polish MY 2025/26 wheat crop is, on average, of very high quality, with less than 28 percent feed wheat and an average protein content between 11.5 and 12.4 percent. In the Baltic States, the MY 2025/26 grain harvest also rose from the previous year's levels. In all three countries, the wheat planted area was larger than in MY 2024/25, however harvested area was diminished, especially in Latvia, due to the heavy rains and storms in June and July. Yields were overall significantly higher.

Hungarian wheat crop in MY 2025/26 was boosted due to a 14 percent higher area planted - to the detriment of corn and rapeseed - which more than offset lower yields brought on by drought in the spring and extensive lodging in the summer due to thunderstorms. Czechia and Slovakia also expect higher MY 2025/26 grain crop.

MY 2025/26 Romanian wheat crop benefited from optimal weather conditions, with abundant rains and moderate temperatures during the vegetation process resulting in above-average yields. The increase in planted area combined with a productivity boost led to a significant year-on-year increase in wheat production, setting a historic record. Quality parameters are reported to be very good, except for the elasticity index W, which was reported to vary widely.

The Belgian MY 2025/26 wheat crop was harvested under much better conditions than in previous years. Most winter wheat was harvested in mid-July. Only in the southeast producing regions harvest extended into early August. The dry weather also had a positive effect on crop health: disease pressure remained exceptionally low. Leaf spot was barely observed, and dwarf rust and yellow rust also remained limited this season.

Spain's wheat production for MY 2025/26 is confirmed to exceed MY 2024/25 levels because of a combination of larger area and improved yields, meaning that for two consecutive years, the Spanish wheat crop has been above average, after a disastrous MY 2023/24 crop that resulted from drought.

Bulgarian MY 2025/26 wheat crop is also revised upward due to the excellent harvest. Milling quality, however, is reported to be lower than MY 2024/25, with only 50 to 60 percent milling wheat.

EU wheat feed use is expected to increase sharply in MY 2025/26 given the higher supply in main EU producing countries and increased competitiveness of wheat in the feed formula. FSI wheat uses are also expected to slightly increase in MY 2025/26 with an increase both in the milling sector and the starch sector. Biofuel uses of wheat are expected to grow due to the relative competitiveness of wheat.

The larger EU grain crop is expected to result in lower EU wheat imports demand in MY 2025/26. Spain, the EU's main grain-importing MS, is expected to increase intra EU imports of wheat at the expenses of vastly reduced imports from Ukrainian wheat that are now subject to TRQs. On the other hand, Italy is only anticipated to marginally reduce its extra-EU imports in MY 2025/26 as the domestic demand for durum remains strong.

Ukraine is expected to remain a key supplier of wheat to the EU, using various transport routes including the Black Sea corridor and road/rail via neighboring countries like Moldova. While the EU has recently reintroduced tariff quotas for Ukrainian wheat to stabilize its internal market, Ukraine is simultaneously redirecting some supplies to markets in Asia and Africa. (For additional information, see Policy section below.) Finally, as in the previous seasons, Canada is expected to remain a major supplier of wheat, mostly durum, to the EU.

Figure 5. Main Wheat Suppliers to the EU (MMT)

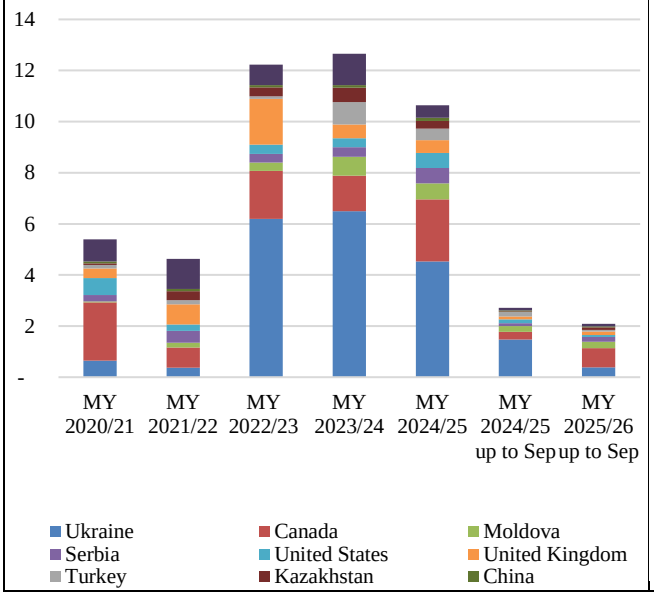
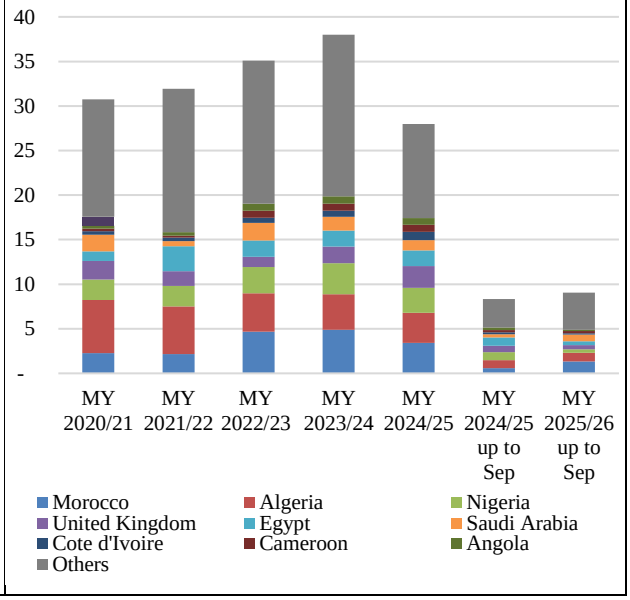


Figure 6. Main EU Wheat Destinations (MMT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

EU wheat exports in MY 2025/26 are anticipated to sharply rise, due to higher available exportable volumes from France, Germany, Poland, Baltic States and Romania. France is projected to be back as the largest EU exporter of wheat to non-EU countries, surpassing Romania, whose exports are also expected to grow. Post anticipates that France is unlikely to regain is presence on the Algerian market, which was previously a major importer of French wheat. Algeria's state grain agency, the OAIC, has been tacitly excluding French wheat from tenders, a move traders attribute to diplomatic tensions, although the agency cites quality issues like low specific weight as the official reason. Bulgaria and Romania, in addition to Russia, are likely to continue to replace France on the Algerian market.

French wheat exports to Morocco could continue to benefit in MY 2025/26 from restricted exports to Algeria. Egypt is likely to keep its place as the top-destination for the Romanian wheat, followed closely by Saudi Arabia. Benefitting from a weaker French competition in MY2024/25, Romania and

Poland also exported to new markets in West and Central Africa, a trend expected to continue in MY 2025/26. Following record exports of 6.5 MMT in MY 2024/25, Bulgarian exports are expected to decline in MY 2025/26, mainly due to Black Sea competition and more abundant EU competition.

With a significantly higher supply and despite higher consumption, wheat ending stocks in MY 2025/26 are expected to significantly increase compared to Post's previous estimate. As a result, current season stocks will reach much higher levels than in MY 2024/25. This situation is foreseen to keep a downward pressure on wheat prices in the EU until the end of MY 2025/26. In Poland, unsold stocks from MY 2024/25 remain in storage. Finland has maintained a food stockpile since 2022, with a total capacity to cover about 8.5 months of domestic food use. In comparison, Sweden began its first emergency grain stockpile in the fall of 2025, with an initial goal of storing wheat, barley, and oats to cover approximately 3 months of domestic food needs.

Section II. Coarse Grains[6]

Corn

Table 3. Production, Supply and Distribution - Corn

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8,283	8,225	8,680	8,600	8,100	8,200
Beginning Stocks (1000 MT)	8,024	8,024	7,314	7,227	6,188	6,144
Production (1000 MT)	61,947	61,900	59,024	59,500	55,750	57,500
MY Imports (1000 MT)	19,832	19,832	18,700	18,587	21,000	20,000
TY Imports (1000 MT)	19,832	19,832	18,700	18,587	21,000	20,000
Total Supply (1000 MT)	89,803	89,756	85,038	85,314	82,938	83,644
MY Exports (1000 MT)	4,389	4,389	2,750	2,770	1,800	1,900
TY Exports (1000 MT)	4,389	4,389	2,750	2,770	1,800	1,900
Feed and Residual (1000 MT)	58,100	58,100	56,100	56,000	55,200	55,500
FSI Consumption (1000 MT)	20,000	20,040	20,000	20,400	20,100	20,250
Total Consumption (1000 MT)	78,100	78,140	76,100	76,400	75,300	75,750
Ending Stocks (1000 MT)	7,314	7,227	6,188	6,144	5,838	5,994
Total Distribution (1000 MT)	89,803	89,756	85,038	85,314	82,938	83,644
Yield (MT/HA)	7.4788	7.5258	6.8000	6.9186	6.8827	7.0122
(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.

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

MY 2025/26, EU corn production estimate is revised down from the Post's summer estimates to 57.5 MMT. The downwards revision is driven by a record-low planted area in major corn-producing countries, which outweighed any area expansion in other EU member states. Post estimates that MY 2025/26 corn yields will marginally exceed previous season's disastrous levels. Overall, yields deteriorated in the south-eastern EU MSs, where summer growing conditions were marked by extremely high temperatures over an extended period and prolonged dryness. Conversely, in central and northern Europe, abundant rainfall during key crop-development stages supported corn development.

In Romania, a significantly lower planted area in conjunction with unfavorable weather conditions trimmed the corn crop to its lowest level since 2012. Fields in the western region suffered from long days with heat and lack of rainfall, while yields in the north-east and to some extent in east rebounded from the previous season. In Hungary, by early July the top one-meter soil layer became critically dry, with moisture content falling below 30 percent of water. Due to the lack of rainfall, the green biomass of corn was significantly below average, with field conditions being particularly poor in eastern Hungary. For a fourth straight year, Bulgaria experienced extreme hot and dry summer conditions that hampered the crop with strong impacts on yields, production, and farm income. Similar negative weather factors impacted the French corn crop in the second half of the summer, particularly in the southwest of France, the main corn producing area, hence yields were revised down. The drop in France's corn yield was only partly compensated by the larger area, which was higher than anticipated in the previous Post's estimate.

Conversely, some MS reported a crop improvement as compared to the previous estimates. In Poland, the cold spring was followed by favorable weather conditions which supported crop development, ultimately leading to higher yields. Spain's corn production for MY 2025/26 is expected to exceed last year level because of a larger area and irrigation water availability. In Slovakia, higher harvest was due to both area expansion and favorable weather conditions which supported strong increase in yields. In Austria, corn area expanded, which in ccombination with higher yield, led to an increase in production.

Corn harvesting is underway or has been completed, after being interrupted by the rainfall in October. In the areas with poor crop performance, harvesting started much earlier than during an average year, while in the areas confronted with excess water harvesting is behind schedule. That is the case of Poland, where forecasts indicate that harvest could last one month longer than usual. These delays might translate into additional storage costs and risks associated with worsening weather conditions in late fall.

Total EU corn consumption is forecast to contract by nearly one percent in MY 2025/26 from the previous season, mainly driven by the feed component. The largest decreases against the previous year for feed use are reported in France, Spain, Hungary and Bulgaria, which could not be offset by the increases in Germany, Austria, Poland, Croatia, and Lithuania. The main reason cited for the feed decline is the lower corn availability and strong competition posed by the alternative grains, which are plentiful this season. Other MS estimate either a flat feed consumption (Romania, Portugal) or very small variations.

Food use is projected to decrease in MY 2025/26, driven by negative adjustments in Romania and Bulgaria, prompted by high domestic corn prices. Industrial use is anticipated to be year-on-year flat, as reductions foreseen in Hungary and Germany are nearly nulled by the increases in Romania and Austria. MY 2024/25 total consumption was reduced due to lower feed use, and despite the improved corn utilization for industrial and for food purposes.

EU corn imports in MY 2025/26 are foreseen to amount 20 MMT, nearly 1.5 MMT up from previous season's volumes, on the need to cover the gap created by the short EU corn supply. With an ample corn crop this fall, Ukraine is anticipated to remain the leading trading partner for the EU, despite the slower pace of imports from Ukraine in the first part of the season due to delays in harvest. The United States is anticipated to consolidate its recently gained market share on the EU market, given its abundant supply, and so is Brazil. Rebounded crop in Moldova is anticipated to partially offset the absence of the Serbian corn, whose very low crop substantially reduces the export availability. Spain, the Netherlands, Italy, Portugal, and Ireland are the largest EU corn importers. According to the latest customs data, MY 2024/25 imports reached 18.6 MMT. The United States (3.7 MMT), Brazil (2.9 MMT) and Canada (1.9 MMT) enlarged their exports taking advantage of the Ukrainian (9 MMT) low exportable supply.

MY 2025/26 exports are foreseen to plunge to 1.8 MMT, which is less than half of the five-year average. The drop stems largely from the reduced export availability in the leading EU corn exporter, Romania. Lower exportable supply from France and Bulgaria is expected to impact the EU presence on foreign markets. Later in the year, this weakness may be transformed in a trade opportunity for Poland given its bumper crop. In terms of markets, the United Kingdom is expected to remain the key export destination, followed by Turkey and Switzerland. Per the latest customs data, MY 2024/25 exports reached 2.8 MMT, with the United Kingdom, Turkey, Lebanon, Israel, and Switzerland, as the top export destinations.

Ending stocks are expected to decline further in marketing year (MY) 2025/26, driven by a corn market deficit. Inventory levels are anticipated to decrease in southern EU MS, while increasing in others, such as France and Poland.

Figure 7. Main Corn Suppliers to the EU (MMT)

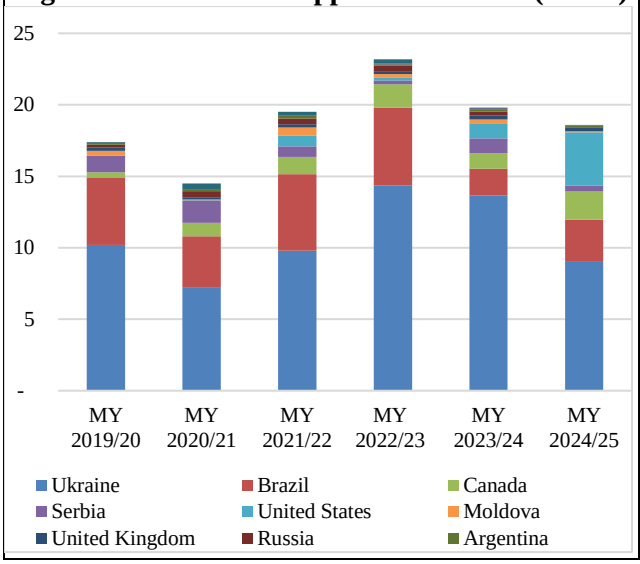
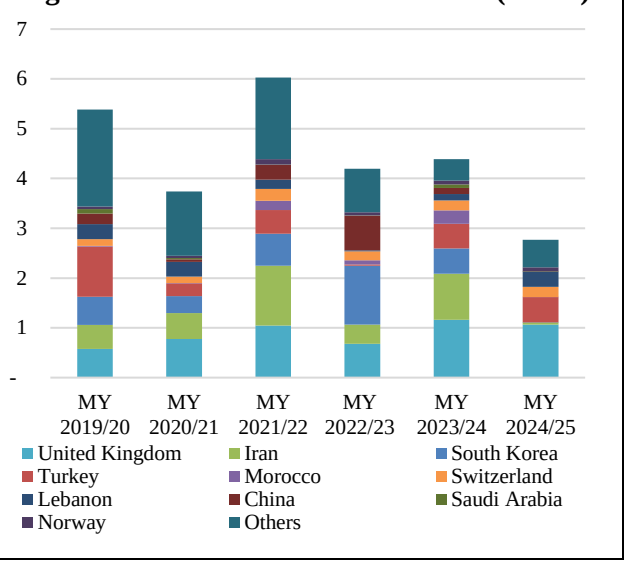
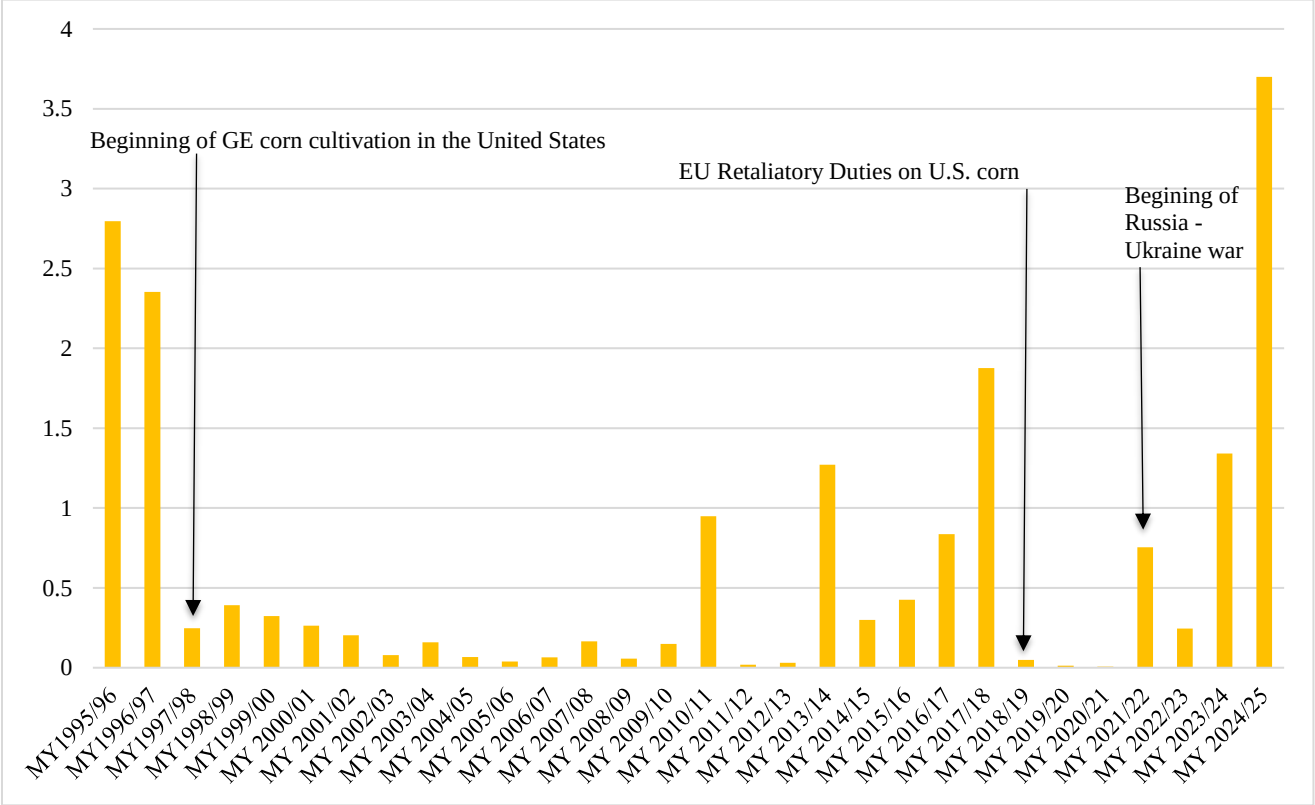


Figure 8. Main EU Corn Destinations (MMT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Figure 9. U.S. Corn Exports to the EU (MMT)8



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

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	10,368	10,311	10,300	10,195	10,000
Beginning Stocks (1000 MT)	5,726	5,726	5,599	5,454	5,916	5,956
Production (1000 MT)	47,903	47,479	50,285	50,126	55,000	55,795
MY Imports (1000 MT)	1,929	1,929	1,232	1,228	900	800
TY Imports (1000 MT)	1,590	1,590	1,050	1,050	900	900
Total Supply (1000 MT)	55,558	55,134	57,116	56,808	61,816	62,551
MY Exports (1000 MT)	6,759	6,750	6,200	6,202	7,300	7,600
TY Exports (1000 MT)	6,695	6,696	7,100	7,100	7,100	7,300
Feed and Residual (1000 MT)	30,700	30,560	32,400	32,300	35,200	35,200
FSI Consumption (1000 MT)	12,500	12,370	12,600	12,350	12,850	12,900
Total Consumption (1000 MT)	43,200	42,930	45,000	44,650	48,050	48,100
Ending Stocks (1000 MT)	5,599	5,454	5,916	5,956	6,466	6,851
Total Distribution (1000 MT)	55,558	55,134	57,116	56,808	61,816	62,551
Yield (MT/HA)	4.6283	4.5794	4.8768	4.8666	5.3948	5.5795
(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.

The overall outlook for barley production in MY 2025/26 is satisfactory, despite the EU barley area for MY 2025/26 being revised down to an estimated 10 million Ha compared to previous season levels. In most EU countries, farmers moderately reduced their plantings, with the exceptions of Spain and Romania, where area sown to barley expanded.

Despite lower planted area, harvest increased almost all over the EU, including in Spain, France, Germany, Denmark, Poland, the Balkans, Czechia, and Hungary. Only the Baltics, Finland, the Netherlands, Italy, and Portugal have shown a decline in production. In early summer, high temperatures accelerated barley ripening in most parts of the continent. In Central Europe, heatwaves and lack of rainfall hastened the end of the growing cycle. However, since barley is harvested earlier than other grain crops, yields were less affected by the increasingly hot and dry conditions. Therefore, better yields and strong harvests in France, Germany, Spain, and Romania were the main drivers of the increase in the EU's barley production, projected at 55.8 MMT.

Total barley consumption in MY 2025/26 is set to increase to 48.1 MMT, driven by solid demand for feed barley due to better supply and improved competitiveness against corn in the EU market, particularly in France, and Spain. Additionally, barley is expected to fill the gap in the EU's feed formula created by poor corn harvests in Hungary, Bulgaria, and Romania. Despite a sluggish malting sector, enhanced processing capacities are also projected to lead to moderate growth in the biofuel, food, and feed industries, including protein and fiber purposes.

Given the satisfactory outlook for EU's barley production, imports are anticipated to remain low. Conversely, EU exports are expected to rebound in MY 2025/26 despite emerging challenges, such as abundant global supply, and waning price competitiveness against crops from Russia and from the southern hemisphere. Still, EU barley retains potential to stay competitive. Hence, France started strong in the Chinese market in MY 2025/26, while Germany and Romania are also expected to export more to the Middle East and North Africa.

Due to the increase in production and improved availability of wheat, largely preferred by feed compounders, barley stocks are expected to rise to one of the highest levels in a decade in MY 2025/26.

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

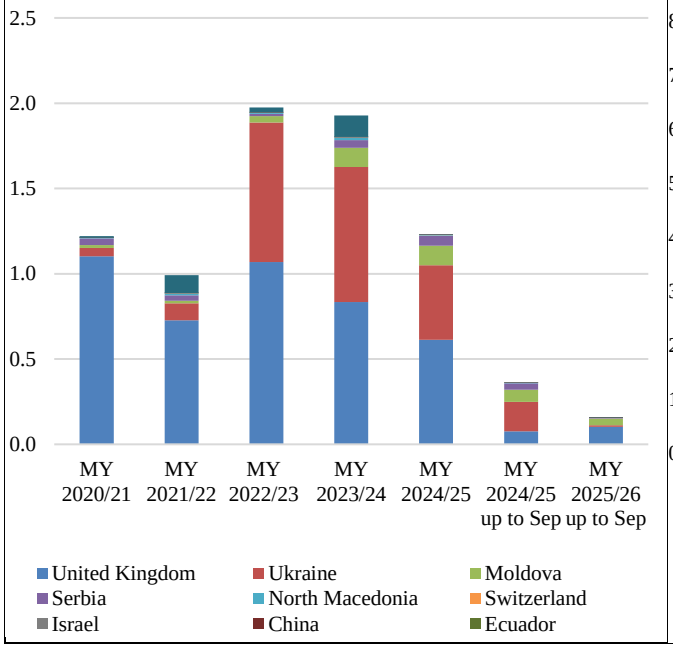
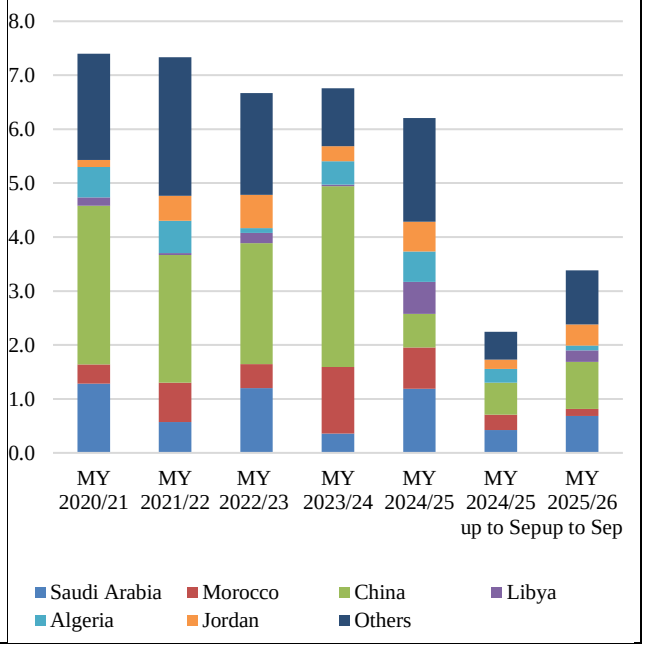


Figure 11. Main EU Barley Destinations (MMT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

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	1,876	1,732	1,717	1,670	1,673
Beginning Stocks (1000 MT)	1,202	1,202	1,313	1,319	924	894
Production (1000 MT)	7,647	7,648	6,894	6,883	7,200	7,700
MY Imports (1000 MT)	187	187	8	8	40	20
TY Imports (1000 MT)	167	167	10	10	40	
Total Supply (1000 MT)	9,036	9,037	8,215	8,210	8,164	8,614
MY Exports (1000 MT)	238	238	91	91	150	125
TY Exports (1000 MT)	213	213	110	110	150	150
Feed and Residual (1000 MT)	4,200	4,200	4,250	4,300	4,300	4,400
FSI Consumption (1000 MT)	3,285	3,280	2,950	2,925	2,950	2,945
Total Consumption (1000 MT)	7,485	7,480	7,200	7,225	7,250	7,345
Ending Stocks (1000 MT)	1,313	1,319	924	894	764	1,144
Total Distribution (1000 MT)	9,036	9,037	8,215	8,210	8,164	8,614
Yield (MT/HA)	4.0654	4.0768	3.9804	4.0087	4.3114	4.6025
(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 2025						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

MY2025/26, EU rye crop is forecasted to reach 7.7 million MT, the highest level in the last four years due to a significant recovery in yields offsetting the lower area planted across the EU main producing MS, like Poland and Denmark, except for Germany, where rye area slightly increased. Rye plantings benefited from a mild winter in the main producer countries and variable but relatively abundant rainfall during the growing season. In the EU, rye is planted predominantly in sandy, less fertile soils which easily allow water to pass through deeper layers making it difficult for plants to access water. The rainfall distribution and soil moisture proved to be very favorable for rye cultivation this year.

Abundant MY2025/26 harvest is expected to lead to increased year ending stocks and greater feed use. Given the abundant supply of high-quality, competitively priced wheat and barley, increased use of rye for feed is also projected on farms.

Total EU MY2025/26 ending stocks are forecasted to revert to average volumes, up from the low levels registered in MY 2024/25.

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	2,226	2,484	2,480	2,535	2,573
Beginning Stocks (1000 MT)	596	596	253	267	608	492
Production (1000 MT)	5,941	5,929	7,757	7614	8,000	8,842
MY Imports (1000 MT)	109	110	64	64	90	40
TY Imports (1000 MT)	98	98	65	65	90	0
Total Supply (1000 MT)	6,646	6,635	8,074	7945	8,698	9,374
MY Exports (1000 MT)	118	118	91	93	125	150
TY Exports (1000 MT)	118	118	100	100	125	125
Feed and Residual (1000 MT)	4,825	4,800	5,850	5,835	6,150	6,360
FSI Consumption (1000 MT)	1,450	1,450	1,525	1,525	1,525	1,565
Total Consumption (1000 MT)	6,275	6,250	7,375	7,360	7,675	7,925
Ending Stocks (1000 MT)	253	267	608	492	898	1,299
Total Distribution (1000 MT)	6,646	6,635	8,074	7,945	8,698	9,374
Yield (MT/HA)	2.6011	2.6635	3.1228	3.0702	3.1558	3.4365
(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.

In MY2025/26, oat production in the EU is estimated to have reached a historic high of 8.8 million MT. This record crop was achieved thanks to larger area planted and very high yields. Temperature and rainfall patterns in the oat-growing regions favored oat growth this season. Oat production in the EU is characterized by significant cyclical fluctuations, mostly due to variable weather conditions in recent years. In Poland, the largest oat producer in the EU, the strong increase in production was achieved thanks to record yields. Finland and Spain achieved record production levels in MY2025/26 despite a decline in planted area. In Germany, excellent production results were achieved driven by both increased area and excellent yields.

Most of the larger oat crops are fed domestically in the producing countries. In MY2025/26, the use of oats in processing for human consumption is expected to grow as oats are regarded as healthy food and increasingly in demand for oat-based drinks, as well as by milling and baking industries.

MY2025/26 crop is of high quality, with good parameters for storage, particularly in the Scandinavian countries. Post projects a record increase in ending stocks, more than twice the average in previous years. Following the MY 2023/24, when a significant oat supply shortage occurred, farmers and livestock breeders, particularly horse breeders, are now more inclined to hold onto oat stocks than before, when supply and economic fluctuations in the market were less severe.

Mixed Grains[7]

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	3,017	2,883	2,823	2,880	2,863
Beginning Stocks (1000 MT)	968	968	925	904	795	557
Production (1000 MT)	12,807	12,686	11,820	11,513	12,250	12,770
Total Supply (1000 MT)	13,775	13,654	12,745	12,417	13,045	13,327
Feed and Residual (1000 MT)	11,200	11,100	10,500	10,400	10,700	11,000
FSI Consumption (1000 MT)	1,650	1,650	1,450	1,460	1,450	1,555
Total Consumption (1000 MT)	12,850	12,750	11,950	11,860	12,150	12,555
Ending Stocks (1000 MT)	925	904	795	557	895	772
Total Distribution (1000 MT)	13,775	13,654	12,745	12,417	13,045	13,327
Yield (MT/HA)	4.1717	4.2048	4.0999	4.0783	4.2535	4.4604
(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.

Mixed grain production in MY2025/26 exceeded last year's levels, driven by record yields from all major producers and increased total area.

In MY2025/26, feed use is forecast to increase following the abundant crop. On-farm feed is by far the main usage for mixed grains, accounting for roughly 90 percent of total consumption. There is a growing preference to feed triticale to livestock over other mixed grains due to its higher nutritional value, which supports higher triticale share within mixed grains production. Food, Seed, and Industrial use of mixed grain in MY2025/26 is forecast to increase, particularly due to expanded industrial use for bioethanol and biomethane production.

Mixed grains are used by farmers for their day-to-day needs. Stocks are used up systematically throughout the year, so end-of-year stocks are usually small. Given the higher production and abundant availability of other varieties of grains, it is expected that MY2025/26 ending stocks will be higher in comparison with the previous year.

[7]Figures for EU mixed grain include triticale, and the threshed, dry seeds of wheat, barley, corn, oats, rye, and sorghum grown and harvested on the same field.

Sorghum

Table 8. Production, Supply and Distribution – Sorghum

Sorghum	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	149	155	219	223	195	207
Beginning Stocks (1000 MT)	15	15	21	43	76	33
Production (1000 MT)	794	820	1,021	990	910	905
MY Imports (1000 MT)	20	20	115	115	250	210
TY Imports (1000 MT)	16	16	250	259	200	200
Total Supply (1000 MT)	829	855	1,157	1,148	1,236	1,148
MY Exports (1000 MT)	13	12	15	15	15	10
TY Exports (1000 MT)	11	10	15	15	15	10
Feed and Residual (1000 MT)	780	785	1,050	1,085	1,150	1090
FSI Consumption (1000 MT)	15	15	16	15	16	15
Total Consumption (1000 MT)	795	800	1,066	1,100	1,166	1105
Ending Stocks (1000 MT)	21	43	76	33	55	33
Total Distribution (1000 MT)	829	855	1,157	1,148	1,236	1,148
Yield (MT/HA)	5.3289	5.2903	4.6621	4.4395	4.6667	4.372
(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.

EU sorghum production in MY 2025/26 is down from MY 2024/25 due to a combination of smaller sorghum area and decreased average yield. The somewhat higher area and improved yields registered in Hungary and Romania did not suffice to counter the area and yields declines in France. In France, farmers reverted to larger winter grains plantings, given the favorable conditions for fall plantings prevailing and the disappointing sorghum yields obtained in MY 2024/25.

Trade data available indicate that sorghum exports to the EU until September 2025 amounted to 146 thousand MT, primarily sourced from the United States. Ample availability of domestic feed grains is currently preventing additional sorghum sales to the EU in MY 2025/26. However, the combination of abundant U.S. sorghum supplies, together with China's market opening to Brazilian sorghum imports as of September 12, 2025, has the potential to divert additional quantities of U.S. sorghum to the EU in the second half of MY 2025/26.

Section III. Rice

Table 9. Production, Supply and Distribution – Rice

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	346	346	394	397	415	422
Beginning Stocks (1000 MT)	828	828	700	725	996	954
Milled Production (1000 MT)	1,371	1,367	1,595	1,532	1,770	1,609
Rough Production (1000 MT)	2,141	2,263	2,491	2,613	2,764	2,801
Milling Rate (.9999) (1000 MT)	6,404	6,041	6,404	5,863	6,404	5,744
MY Imports (1000 MT)	2,110	2,111	2,537	2,534	2,300	2,300
TY Imports (1000 MT)	2,413	2,414	2,500	2,500	2,300	2,300
Total Supply (1000 MT)	4,309	4,306	4,832	4,791	5,066	4,863
MY Exports (1000 MT)	359	361	336	337	400	400
TY Exports (1000 MT)	362	362	350	350	400	400
Consumption and Residual (1000 MT)	3,250	3,220	3,500	3,500	3,600	3,550
Ending Stocks (1000 MT)	700	725	996	954	1,066	913
Total Distribution (1000 MT)	4,309	4,306	4,832	4,791	5,066	4,863
Yield (Rough) (MT/HA)	6.1879	6.5405	6.3223	6.5819	6.6602	6.6374
(1000 HA),(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

In MY 2025/26, EU rice production[8] is forecast to increase compared to the previous year, with growth in Spain, Greece, France, Bulgaria, Romania, and Hungary. Production in Portugal and Italy is expected to level off. In Italy, hailstorms at the end of September are anticipated to impact yields. In the case of Portugal, production is expected to stay at 2024 levels, but above the five-year average, despite the delays in planting, weed incidence, and early fall storms.

In MY 2025/26, EU rice area is forecast to grow, mainly driven by expansions in Italy, Spain, Greece, and France. In Spain, improved availability of irrigation water has allowed farmers to maximize their rice planting potential. In Italy, the increase in rice area is linked to the crop's profitability, supported by strong market prices. Rice planted area is expected to stabilize in Portugal, Bulgaria, and Romania.

EU rice consumption is projected to keep an upward trend in MY 2025/26, supported by easing inflation, sustained activity in the hotel-restaurant-institutional (HRI) sector, and growing demand for convenient and versatile meal options.

Indica rice varieties, such as Basmati and Jasmine, are gaining popularity due to their suitability for quick and varied meal preparations and their increasing appeal to a more multicultural consumer base. The EU rice market is divided into two segments. In major rice-producing Member States such as Italy, Spain, and Greece, Japonica remains the preferred rice variety for consumers, integrated into traditional

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

dishes like risotto, paella, and seafood recipes. Portugal is an exception, where Indica rice accounts for 50 percent of total consumption, followed by Japonica at nearly 20 percent, with Basmati ranking third at over 15 percent market share.[9] Meanwhile, non-rice producing EU Member States tend to import Basmati and other non-traditional varieties such as wild rice blends, brown (husked) rice, and glutinous rice. Broken rice is also utilized within the EU for rice flour production (commonly used in gluten-free baking and cooking), puffed rice, beer fermentation, pet food, and animal feed.

Greater availability of EU rice stocks and higher domestic production in MY 2025/26 are expected to reduce import demand compared to MY 2024/25. However, since EU Indica rice production does not suffice to meet consumer demand, imports of this variety are anticipated to remain strong. Myanmar, India, Cambodia, Pakistan, and Thailand are the EU's leading rice suppliers. The Netherlands serves as a key gateway for rice imports, while Belgium, with its substantial milling capacity but lack of domestic production, also plays a major role in rice trade. Other important rice-importing countries include France and Germany, which have relatively high consumption levels despite negligible (France) or no (Germany) domestic rice production.

European rice farmers are increasingly complaining about rising costs and growing competition from cheaper imports under the Everything But Arms (EBA) scheme, from countries like Cambodia and Myanmar. To protect EU producers from this growing pressure, they are calling on the EU for stronger trade safeguards and automatic protection mechanisms. At the same time, producers point to the need for innovation to develop rice varieties that are more resilient to the climate crisis, ensuring the future sustainability of European rice production.EU rice exports are forecast to increase slightly in MY 2025/26 due to higher domestic availability. Most exports consist of Japonica varieties destined to the United Kingdom and Türkiye, principally sourced from Italy.

Figure 12. Main Rice Suppliers to the EU (TMT)

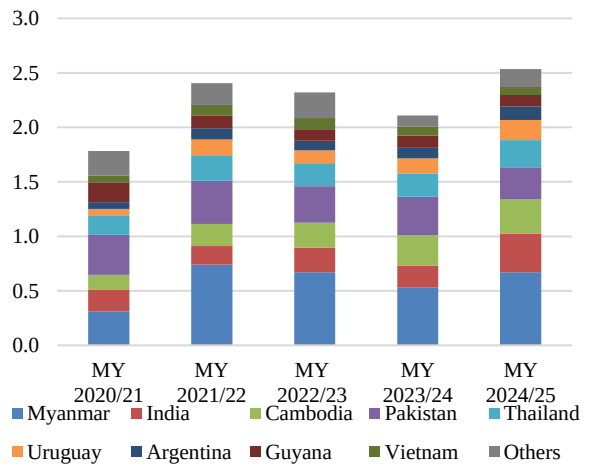
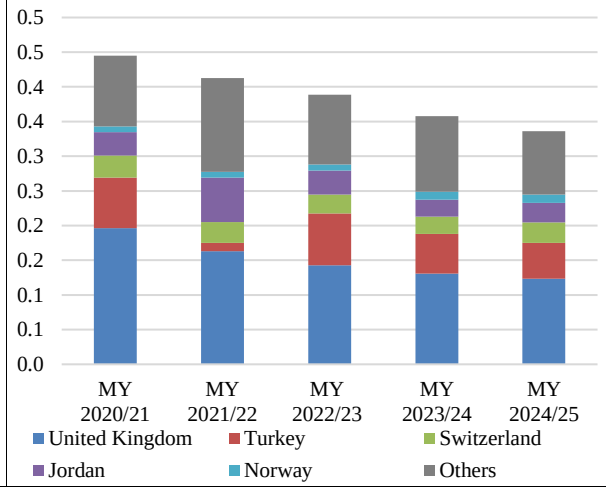


Figure 13. Main EU Rice Destinations (TMT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

[9] 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.

Section IV. Policy[10]

Common Agricultural Policy (CAP)

On May 14, 2025, the European Commission published a proposal to simplify the CAP. The proposed measures target the administrative burden, controls, implementation of the CAP as well as the CAP crisis management tools. Notably, the proposal simplifies environmental requirements (GAECs for good agro-environmental conditions) linked to eco-payments for farmers. On November 11, 2025, the EU institutions reached a political agreement on the proposal. The simplifications will therefore be published in the Official Journal before the end of the year for an implementation starting in 2026.

Main EU Trade Policy Updates Affecting Grains Markets

- **EU – Ukraine Grain Trade Relations**

The European Union granted Ukraine a temporary liberalization of trade with its Autonomous Trade Measures (ATMs) Regulation, which was in effect from June 4, 2022, until June 5, 2025. This regulation suspended import duties, quotas, and trade defense measures on Ukrainian exports to the EU, providing significant economic support during the Russia-Ukraine war. Between June 6 and October 29, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA) via Regulation 1132/2025 reintroducing import quotas on Ukrainian agricultural goods.

On October 29, 2025, the revised EU-Ukraine Deep and Comprehensive Free Trade Agreement (DCFTA) entered into force (Regulation (EU) 2025/2199). The new DCFTA updates the original agreement from 2014. The revised DCFTA increases market access in both directions compared to the 2014 agreement, but limits EU imports of sensitive agricultural products compared to the levels under the ATMs. It also enshrines a new safeguard clause and provides for the alignment of Ukrainian and EU production standards.

Table 10. TRQs for Ukraine as of October 29, 2025[11]

Product	Annual Quantity (MT)	Quantity (MT) Jun 6, 2025 to Dec 31, 2025	Period	In-Quota Duty (€/MT)
Common wheat and products	1,300,000	758,333	Jan-Dec	0 (vs. 95 outside quota)
Corn and products	1,000,000	583,333	Jan-Dec	0 (vs. EU duty calculation)
Barley and products	450,000	262,500	Jan-Dec	0 (vs. 93 outside quota)

Source: Regulation (EU) 2025/2199.

[10] For additional information on EU Policy affecting grains, please consult the EU Annual Grain and Feed Report 2025 GAIN Report.

[11] Please note that the volumes are also applied retrospectively for the second half of calendar year 2025 (June 6 – December 31, 2025) in the amount 7/12th of the annual TRQ volumes above.

- **Additional EU Duties on Russian Grains and Products**

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

- **EU Tariff Reductions Under EU-US Trade Deal**

On June 22, 2018, the EU imposed additional tariffs of 25 percent on **U.S. corn, semi-milled and milled rice**, and products in retaliation against U. S. safeguard measures on EU steel and aluminum (Commission Implementing Regulation (EU) 2018/886). On October 30, 2021, the United States and European Union agreed to end the dispute over U.S. steel and aluminum tariffs. On November 26, 2021, under Commission Implementing Regulation (EU) 2021/2083, the EU suspended tariffs affecting U.S. agricultural products from January 1, 2022, until December 31, 2023. Since then, the tariffs have been suspended several times, the latest until August 7, 2025, with Implementing Regulation 2025/1564.

EU Deforestation Regulation (EUDR)

In June 2023, the European Commission (EC) adopted the EU Deforestation Regulation aimed to prevent products causing deforestation entering the EU market. The proposal targets products identified by the EC as the main drivers of deforestation including soybeans, palm oil, and related products. The Regulation was set to enter into force on December 30, 2024. However, following intense pressure from stakeholders and third countries, on October 2, 2024, adopted a delay for the EUDR implementation by 12 months to December 30, 2025.

On October 21, 2025, the European Commission published a legislative proposal proposing to amend the EUDR due to technical issues in the implementation of the law and a call for simplifications from many stakeholders. The proposal introduces changes in creating new types of operators with new due diligence requirements and changing timelines for entry into application to June 30, 2026, instead of December 30, 2025.

The Council of the European Union and the European Parliament both adopted their positions on the proposal in November 2025. The two co-legislators propose a further extension of the delay for entry into application to December 30, 2026, and a call for the Commission to publish a simplification review by April 30, 2026. Please note that at the time of writing, the final text has not yet been approved but market stakeholders generally anticipate that the implementation delay to December 2026 will most likely be adopted.

EU Rice Policy

From July 8, 2025, under Commission Implementing Regulation 2025/1084, the import duty for husked rice under HS Code 100620, other than husked basmati rice of the varieties referred to in Article 1 of Commission Regulation 972/2006, shall be 42.50 Euros/MT.

Abbreviations used in this report

CY	Calendar Year
e	Estimate (of a value/number for the current, not yet completed, marketing year)
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.
Ha	Hectares
HRI	Hotels, Restaurants, and Institutions
IPAD	International Production Assessment Division
FSI	Food, Seed, and Industrial
MMT	Million Metric Tons
MS	EU MS(s)
MT	Metric Ton (1000 kg)
MY	Marketing Year. July to June for all grains, except for corn which follows an October to September, and rice which follows a September to August calendar
TMT	Thousand Metric Tons
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

Related Reports

Title	Date
Bulgaria: Grain and Feed Market Update	09/11/2025
EU Grain and Feed Quarterly Report 2025	08/05/2025
Spain: Large Crop Expected to Reduce Spain Grain Import Needs	06/17/2025
Bulgaria: Grain and Feed Market Update	06/09/2025
United Kingdom: Grain and Feed Annual	06/04/2025
EU Annual Grain and Feed Report 2025	04/16/2025
EU Imposition of Duties on Chinese Lysine Presents Opportunity for US Suppliers	03/31/2025

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Bob Flach, FAS/The Hague covering the Netherlands, Finland, Denmark, and Sweden

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Sophie Bolla, FAS/USEU/Brussels covering EU policy
Tania deBelder, FAS/USEU/Brussels covering Belgium and Luxembourg
Steve Knight, FAS/London covering Ireland
Denys Sobolev, FAS/Kyev covering Ukraine policy developments affecting the EU grain market.

Attachments:

No Attachments