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Report Highlights:

In MY 2026/27, EU grain total production is anticipated to revert to average levels and amount to 277 MMT. The bumper crop registered in MY 2025/26, combined with the eroded competition and difficulties shipping EU grains overseas is expected to result in stock building at the end of MY 2025/26 and increased importance of intra EU trade.

Disclaimer: This report presents the first outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2026/27. 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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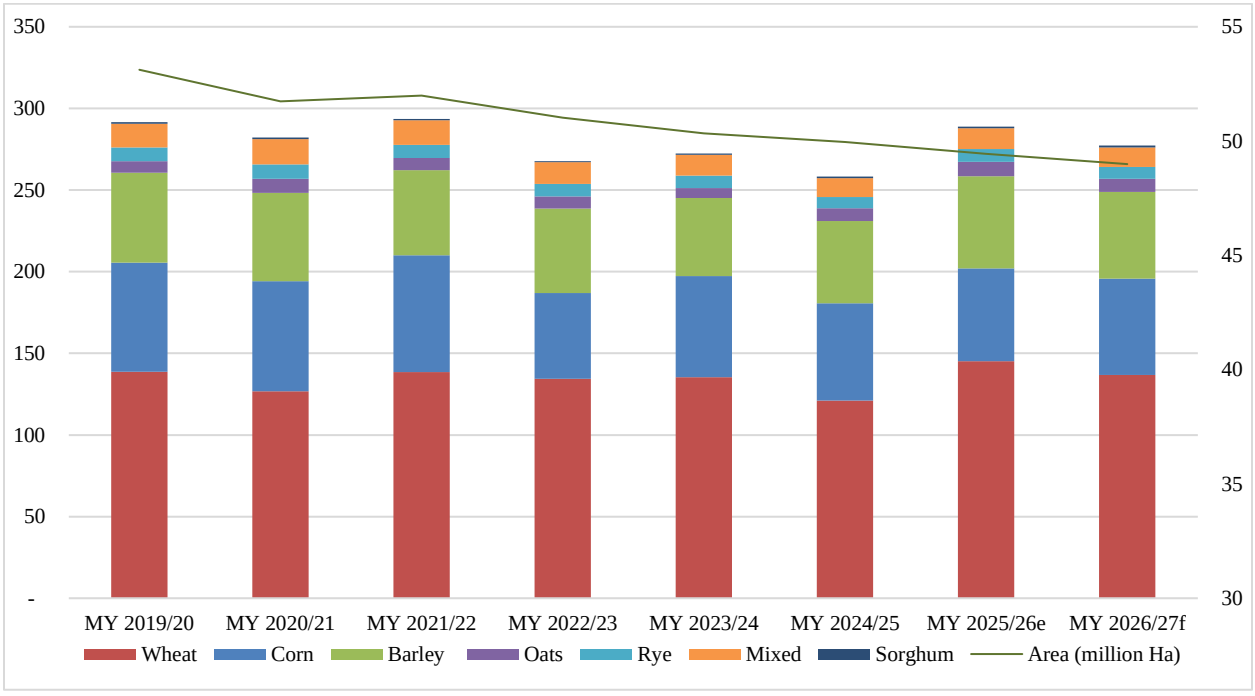
Executive Summary

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

Total Grains	2024/2025		2025/2026		2026/2027	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	48,783	48,764	49,441	49,437		48,993
Beginning Stocks (1000 MT)	31,015	31,015	25,339	26,088		35,615
Production (1000 MT)	258,273	258,244	288,582	288,778		277,200
MY Imports (1000 MT)	30,816	30,890	26,770	25,700		25,935
TY Imports (1000 MT)	30,773	30,843	26,895	25,500		25,940
Total Supply (1000 MT)	320,104	320,149	340,691	340,566		338,750
MY Exports (1000 MT)	37,075	37,078	40,390	41,859		41,900
TY Exports (1000 MT)	38,158	38,183	40,190	41,754		41,790
Feed and Residual (1000 MT)	154,775	154,531	164,425	160,205		159,435
FSI Consumption (1000 MT)	102,915	102,452	103,794	102,887		103,360
Total Consumption (1000 MT)	257,690	256,983	268,219	263,092		262,795
Ending Stocks (1000 MT)	25,339	26,088	32,082	35,615		34,055
Total Distribution (1000 MT)	320,104	320,149	340,691	340,566		338,750

Source: FAS EU Posts.

Figure 1. EU Grain Area and Production



Source: FAS EU estimates.

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

Early estimates indicate that in MY 2026/27 EU farmers marginally reduced their grain plantings, which are estimated to amount to 48.9 million Hectares (Ha), down from the 49.4 million registered in MY 2025/26. This reduction in area reflects the impact of high input costs and low profitability, with farmers in the long run switching to more added value such as tree crops in Member States such as Spain or Portugal, or to higher margin, more weather resilient, lower-intensive crops such as sunflowers across the EU.

Total grain production in the EU in MY 2026/27 is currently forecasted at 277.2 million MT, down from the 288.8 million MT estimated for the exceptional output obtained in MY 2025/26. Winter grains development to the time of writing has been positive across the EU. The Baltic States face risks stemming from winter cold spells, while excessive rainfall impeding field operations is reported in the EU's southwest.

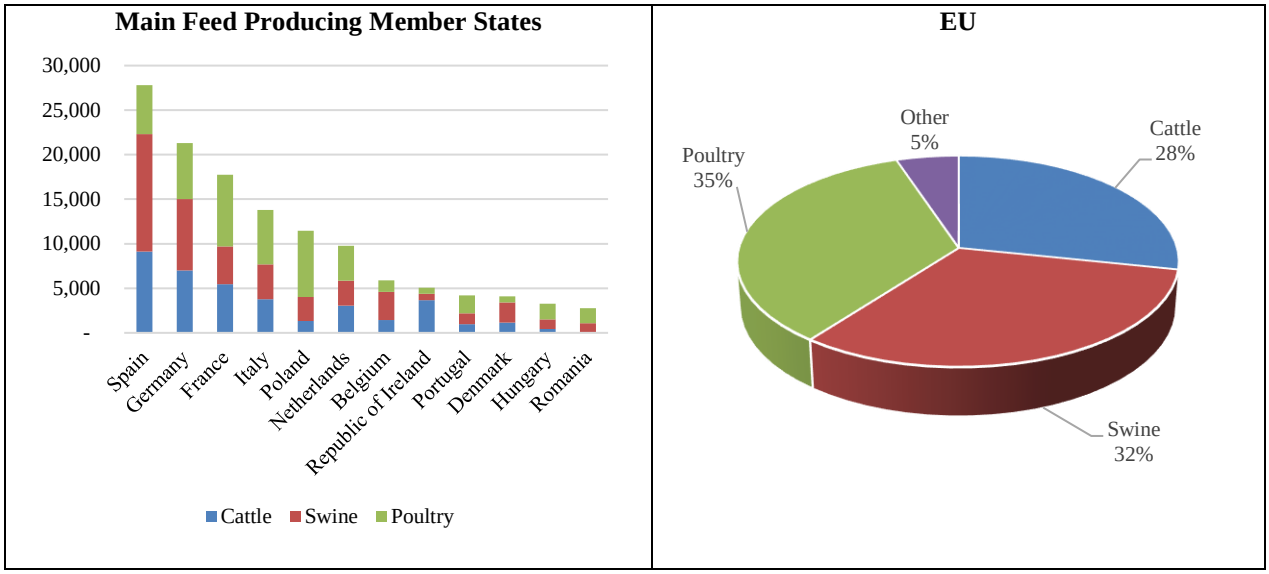
Input costs, especially for fertilizer and fuel, have risen sharply across the EU. The introduction of the Carbon Border Adjustment Mechanism (CBAM) since January 2026 is making imported fertilizer more expensive. Moreover, the ongoing conflict in the Middle East, including the closure of the Strait of Hormuz, has disrupted energy and fertilizer markets, leading to increased volatility, further exacerbating input prices and ultimately reducing EU grain competitiveness overseas. While fertilizer stocks across EU Member States should suffice for spring fertilizing operations, farmers will optimize its use which may reflect not only in grain output levels but also in quality, impacting protein content of grains.

Looking ahead, FAS EU grain analysts have serious concerns for MY 2027/28. A sharp drop in areas planted to grains in the coming fall across the EU cannot be ruled out. The geopolitical situation in the Middle East further inflated fertilizers' prices, which in addition to increased fuel costs, is not mitigated by marginally higher grain prices.

MY 2026/27 EU Grain Demand Holds Steady

Post forecasts EU's total grain consumption for MY 2026/27 at 262.8 MMT, slightly down from the 263.1 MMT estimated in MY 2025/26. This trend is driven by the anticipated contraction in feed grains demand in MY 2026/27 compared to the current season, when ample domestic grains supply at competitive prices and positive margins for livestock producers boosted feed grains uses. The downwards correction in feed uses offsets the anticipated expansion in the Food, Seed and Industrial (FSI) category.

Figure 2. EU Industrial Compound Feed by Type - 2025



Source: FAS EU based on FEFAC data estimates.

MY 2026/27 feed grains use is expected to decline marginally and amount to 159.4 MMT, after peaking in MY 2025/26. The anticipated contraction in domestic grains production is expected to result in reduced feed grain consumption. Additionally, on balance, composite demand across poultry, cattle, and swine sectors will be somewhat lower. The increased demand in poultry feed is not expected to offset the somewhat lower cattle and swine feed consumption.

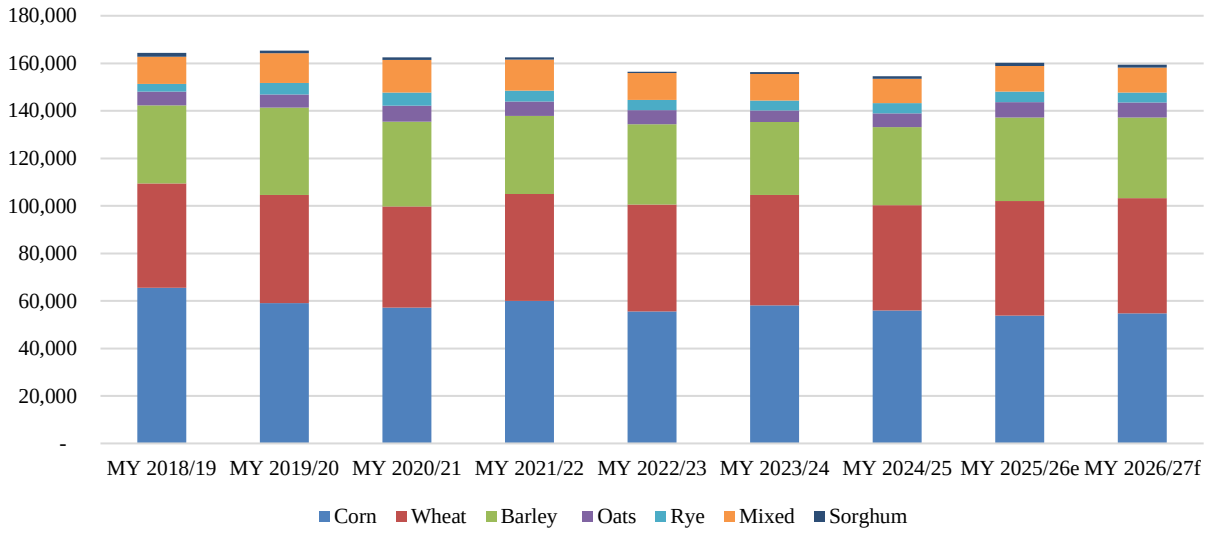
EU chicken meat production is expected to increase in CY 2026 in response to the strong internal demand, driven by the increasing EU population and thriving tourism and Hotel, Restaurant, and Institutional (HRI) activity. Meanwhile, the EU swine sector faces declining carcass prices in CY 2026, driven by domestic oversupply, China's tariffs, and the African Swine Fever (ASF) outbreak in Spain, the EU's largest producer. Similarly, the EU's cattle sector is expected to continue to shrink in CY 2026 confronted by structural problems ranging from limited access to young animals to feed, mounting regulations, and animal diseases despite the favorable meat prices. On a positive note, while also contracting, dairy cow herd increased productivity is expected to result in a steady demand for protein rich feeds.[2] According to FEFAC estimates for CY 2025, poultry feed accounted for 35 percent of the EU's feed production, followed by swine with 32 percent (**Figure 2**).

Corn is expected to remain the preferred feed grain in the EU in MY 2026/27. Barley and wheat use is expected to remain significant in the EU main producing countries, however to a lower extent than in MY 2025/26, when ample supplies supported large inclusion of these winter grains in the feed formula.

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

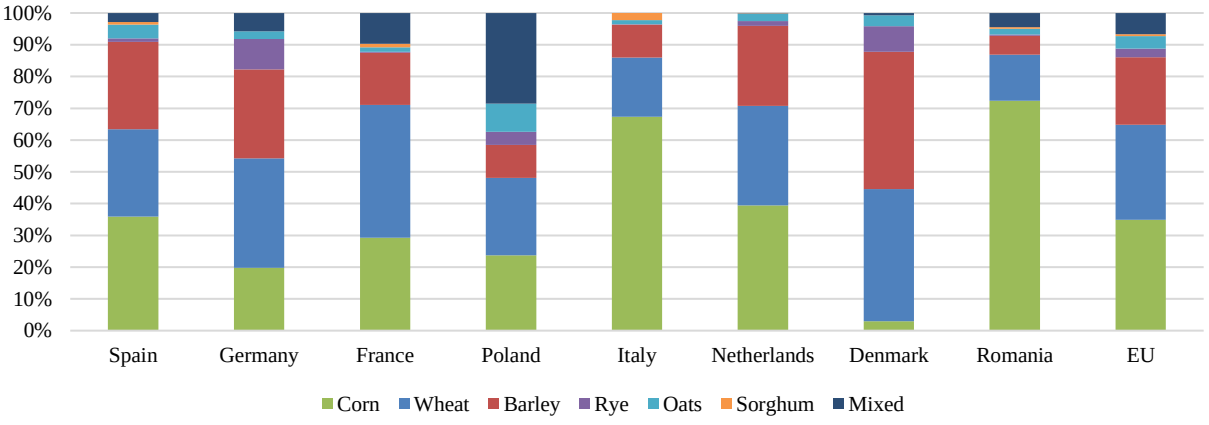
Food, Seed, and Industrial (FSI) uses in MY 2026/27, estimated at 103.3 MMT, are expected to exceed MY 2025/26 levels. The FSI boost is forecast based on convergence of structural, industrial, and regulatory factors, namely: growing populations across the EU, investments in grain-based processing facilities, increasing capacity use in the EU's southeast Member States, as well as, growing biofuel mandates and the larger gasoline pool across the EU and the adoption of E10 and, in some instances E85, in some EU Member States. Crop-based biofuel caps may limit growing grain use in bioethanol potential, while the shift towards Greenhouse Gas (GHG) emission-based policies increases opportunities for bioethanol consumption in the EU.[3]

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 2026/27 Forecast



Source: FAS EU Posts estimates.

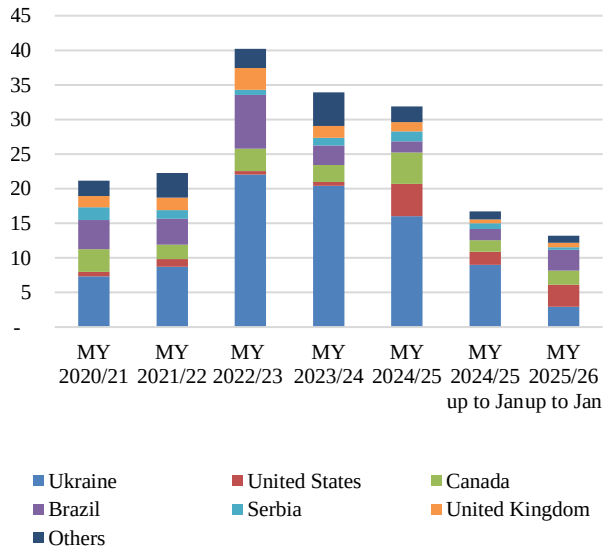
[3] Given the differences of EU biofuel policy at the Member State level it is recommended to consult the information available in the latest EU Biofuels Report and in the latest Biofuel Mandates in the EU by Member State.

In the context of ample EU supplies and steady internal demand, MY 2026/27 trade projections will be determined primarily by logistics. Rising geopolitical tensions and conflicts affecting maritime routes are leading to higher insurance premiums, while longer shipping routes reduce export opportunities and increase reliance on intra-EU trade.

North African countries, such as Morocco and Algeria, together with the United Kingdom and Nigeria are EU's grain main markets. However, nearly two thirds of EU grain exports are directed beyond the top destination markets listed. In MY 2025/26, a rebound in grain exports is expected in line with the ample domestic supplies after the reduced supply in MY 2024/25 weighed down EU exports.

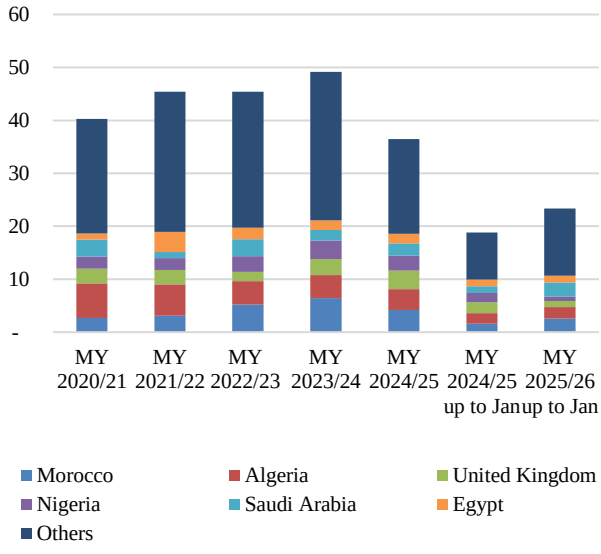
In MY 2025/26, EU grain producers face challenges due to the ample domestic supplies and competitively priced imports, particularly in the case of corn originated in third countries such as Ukraine, Brazil or the United States.

Figure 5. EU Grain Imports (million MT)



Source: Trade Data Monitor, LLC data.

Figure 6. EU Grain Exports (million MT)

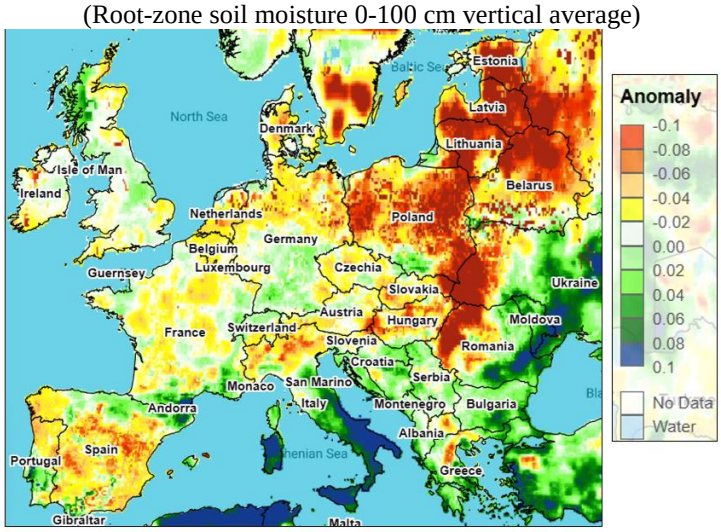


Source: Trade Data Monitor, LLC data.

Similarly, recent and pending trade agreements are a source of concern, with many stakeholders warning that EU producers face unequal market competition unless protective mechanisms are implemented. Some Member States are calling for reforms or safeguards to address these challenges. Meanwhile, import bans (e.g., on some Ukrainian crops in Hungary and Poland) or licensing requirements (e.g., Romania for some Ukrainian grains) are affecting trade flows and market dynamics.

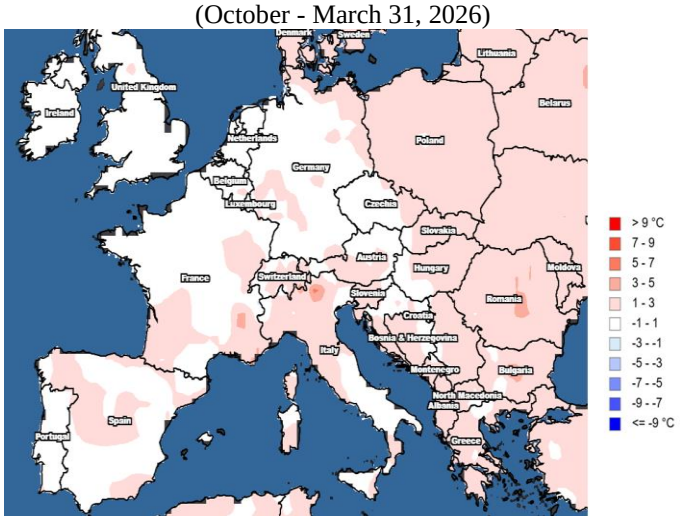
Resulting from the ample MY 2025/26 harvest, EU grain carry out stocks for wheat and barley are projected at historically high level, contributing to downward price pressure, in a context where geopolitical conflicts jeopardize export grain potential. On a positive note, these stock levels can compensate for the lower crop anticipated for MY 2026/27 and serve as a buffer against market disruptions.

Map 1. Soil Moisture Anomaly (March 31, 2026)
(Root-zone soil moisture 0-100 cm vertical average)



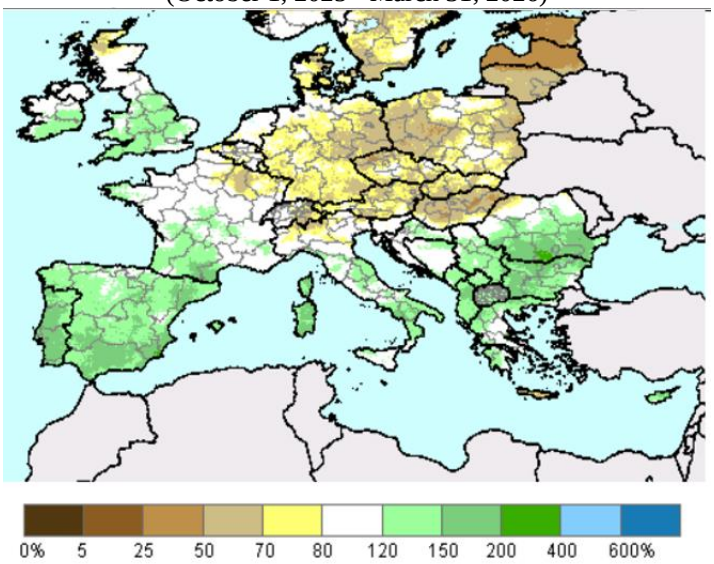
Source IPAD/FAS/USDA.

Map 2. Departure from Normal Temperature
(October - March 31, 2026)



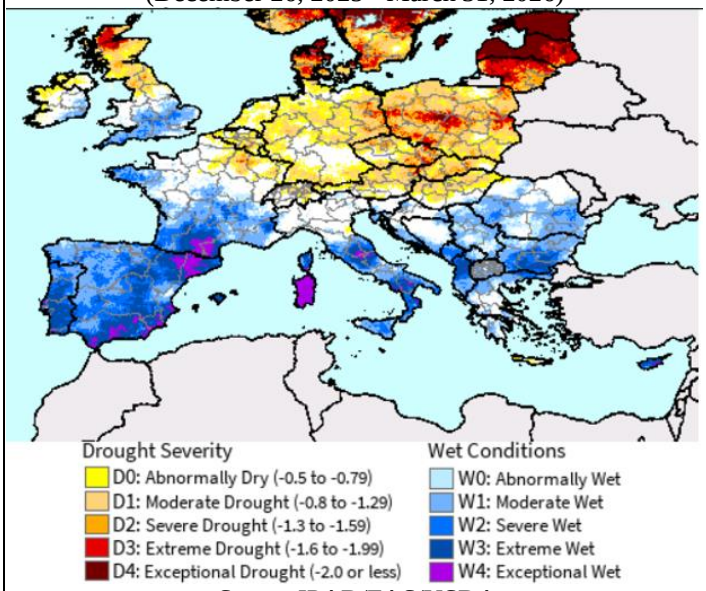
Source IPAD/FAS/USDA.

Map 3. Percent of Normal Precipitation
(October 1, 2025 - March 31, 2026)



Source IPAD/FAS/USDA.

Map 4. Drought Severity
(December 26, 2025 - March 31, 2026)



Source IPAD/FAS/USDA.

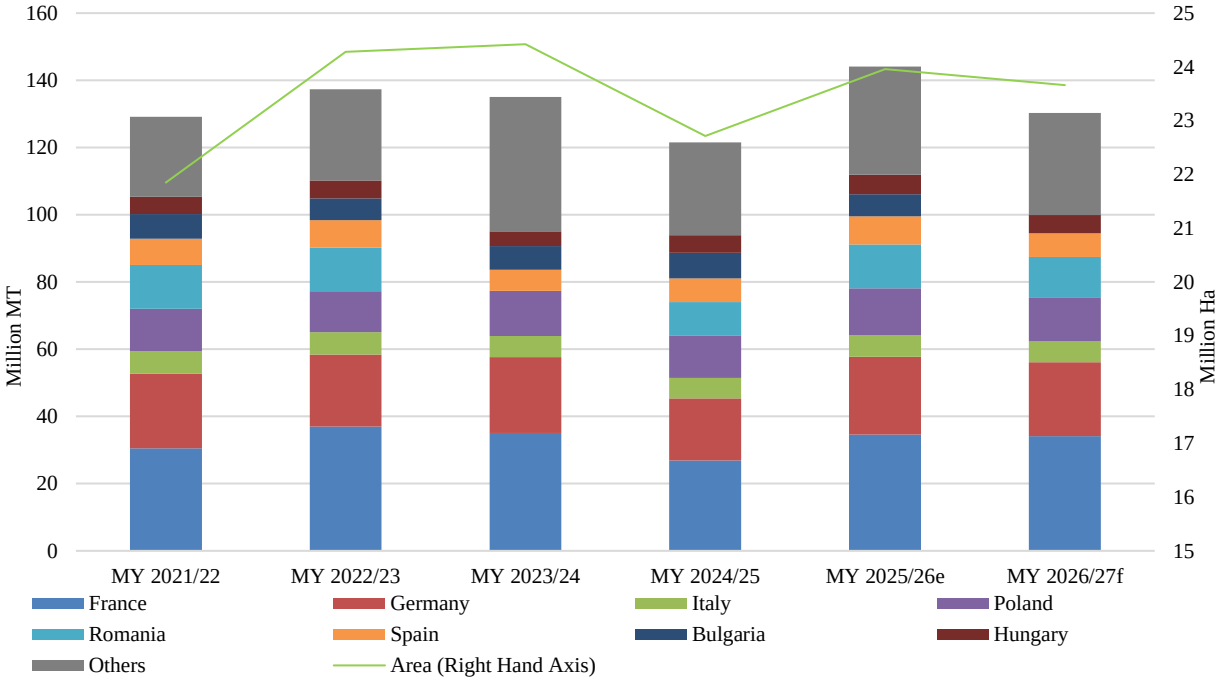
Section I. Wheat

Table 2. Production, Supply and Distribution – Wheat

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
European Union	USDA Official	New Post	USDA Official	USDA Official	New Post	USDA Official
Area Harvested (1000 HA)	22,714	22,712	23,962	23,960		23,650
Beginning Stocks (1000 MT)	15,794	15,794	11,076	12,733		20,133
Production (1000 MT)	121,055	121,045	145,106	145,100		136,800
MY Imports (1000 MT)	10,644	10,716	6,000	6,200		6,500
TY Imports (1000 MT)	10,644	10,716	6,000	6,200		6,500
Total Supply (1000 MT)	147,493	147,555	162,182	164,033		163,433
MY Exports (1000 MT)	27,917	27,917	30,500	32,140		32,000
TY Exports (1000 MT)	27,917	27,917	30,500	32,140		32,000
Feed and Residual (1000 MT)	44,500	44,230	51,000	48,210		48,500
FSI Consumption (1000 MT)	64,000	62,675	64,500	63,550		63,950
Total Consumption (1000 MT)	108,500	106,905	115,500	111,760		112,450
Ending Stocks (1000 MT)	11,076	12,733	16,182	20,133		18,983
Total Distribution (1000 MT)	147,493	147,555	162,182	164,033		163,433
Yield (MT/HA)	5.3295	5.3296	6.0557	6.0559		5.7844
(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 2026/2027 = July 2026 - June 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Figure 7. EU Wheat Area and Production



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

EU wheat area is expected to slightly decline in MY 2026/27 from the high level registered in MY 2025/26 and amount to 23.6 million Ha. In France, the area planted to wheat is forecast to increase driven by higher soft wheat planting, which more than offsets lower durum plantings, expected at the lowest level for two decades. Despite low prices, soft wheat is ideally suited to French soils and weather, and its cultivation is well mastered by French farmers. Producers in other EU countries such as Hungary, Romania, Bulgaria and Spain are expected to slightly reduce wheat area planted. Wheat area is anticipated to remain stable in Germany and Poland.

Overall, the EU MY 2026/27 wheat crop has a good potential and if yields in most Member States are close to average, it could reach 136.8 MMT. There is room for higher yields should weather be favorable throughout spring and early summer, as was the case for the MY 2025/26 crop.

In France the 2026/27 crop situation was notably better than the previous season; no winterkill or losses due to excessive rainfall in the fall and winter were reported this year. According to Cere'Obs, the official French grain crop grading service, close to 84 percent of the MY 2026/27 French wheat crop is in a good to very good situation in early-April 2026, versus less than 76 percent in MY 2025/26 at the same week, and higher than the 5 years average. The ear emergence is also earlier than average, benefiting from warmer temperatures in March 2026.

On the other hand, large rainfall in the fall of 2025 prevented many Romanian farmers from accessing their fields for tillage and sowing, leading to a slight decrease in wheat plantings. Nevertheless, sufficient snow protected the wheat crop from winterkill in December 2025 and January 2026. Overall, the fall/ winter precipitation boosted soil moisture, and as of late March, the MY 2026/27 wheat crop shows good yield potential. A similar trend is seen in Czechia, with winter wheat planting delayed by rainfall in the summer and fall 2025, resulting in delays in winter wheat seeds deliveries. While winter wheat plantings are down, a slight increase in spring wheat is expected as some Czech farmers may be forced to till poorly grown late-sown winter wheat.

Polish wheat farmers had to contend with late corn crop, and heavy rainfall in the fall that delayed winter wheat plantings. Thus, despite a higher interest in wheat crops, partially due to the lower profitability of sugar beet cultivation, wheat areas are expected to remain stable. Snow protected the wheat plants during the winter of 2025/26, vastly limiting the impact of winterkill despite severe frosts. The Polish Central Statistical Office assessed the wheat crop in mid-March 2026 as good.

In Germany, farmers are also expected to have kept their wheat area stable for MY 2026/27. Planting and early growing conditions were generally good. Winterkill is likely limited to Thuringia region, in the east of Germany, where no snow protected the plants from low temperatures. Hungary wheat area for MY 2026/27 is slightly declining after several years of growth, as more farmers switched to barley, less prone to drought related damages. As of March 2026, soil moisture in Hungary and heat indexes are above average, close to the optimal levels. Bulgarian farmers also planted slightly less wheat because of a very wet fall that hampered plantings. However, the soil moisture is good, no winterkill was reported and the MY 2026/27 Bulgarian wheat crop has a good potential. In Spain, return of rains since November 2025 contributed to a good but delayed winter crop establishment. December rainfall further improved water reserves and soil moisture in key Spanish regions. However, a combination of rainfall delaying wheat plantings and lower profitability lead to reduction in wheat area.

The EU mandated Carbon Border Adjustment Mechanism (CBAM) kicked in starting January 1st, 2026. It is estimated that it initially raised fertilizers' prices by 10 to 15 percent from pre-CBAM period and will raise them by up to 30 percent when fully implemented. Most wheat farmers had already secured their fertilizers' purchases in 2025 and thus, nitrogen fertilization for wheat is likely to be marginally reduced for MY 2026/27 crop.

Within FSI, both food and industrial wheat use in the EU are forecast to marginally increase in MY 2026/27, as wheat prices remain competitive versus other feedstocks. Competitive prices will also drive slightly higher wheat uses for biofuel purposes in MY 2026/27, however growth will be tempered as no new bioethanol from wheat facility are scheduled to open in 2026 and 2027. The MY 2026/27 moderate expansion builds on the expected MY 2025/26 increase in FSI use of wheat in the starch industry, the milling uses, and the biofuel sectors. In the current season, the growth is due to the larger availability, following the short crop in MY 2024/25, and low prices prevailing.

In the longer term, the EU milling industry is forecast to continue significant consolidation, with medium-sized mills either being shut down or merged with larger mills belonging to industrial groups or grain cooperatives. However, milling capacity in EU Member States 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 long-term 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 2026/27 is forecasted to slightly increase from the already high MY 2025/26 level, when its use was fueled by ample availability and competitive prices that helped support its inclusion in the feed formula. The feed demand for wheat is also fueled by the steady demand for poultry feed, despite a declining, or at most stagnant, cattle and swine feed demand.

With a smaller domestic supply, EU wheat imports in MY 2026/27 are likely to marginally increase and amount to 6.5 MMT. Import demand from third countries by Spain and Italy, the two main EU importers of wheat, is projected to remain stable.

Available trade data and import licenses issued to date indicate that EU wheat imports in MY 2025/26 will significantly decrease from the high import levels in MY 2024/25 of 10.7 MMT and amount to just 6.2 MMT. Spain, the largest EU grain import market, is expected to rely on the intra-EU supply, namely French wheat, partly replacing the large volumes of third country supplies imported in MY 2024/25. This trend is expected to be reinforced by EU restrictions on imports of Ukrainian wheat.

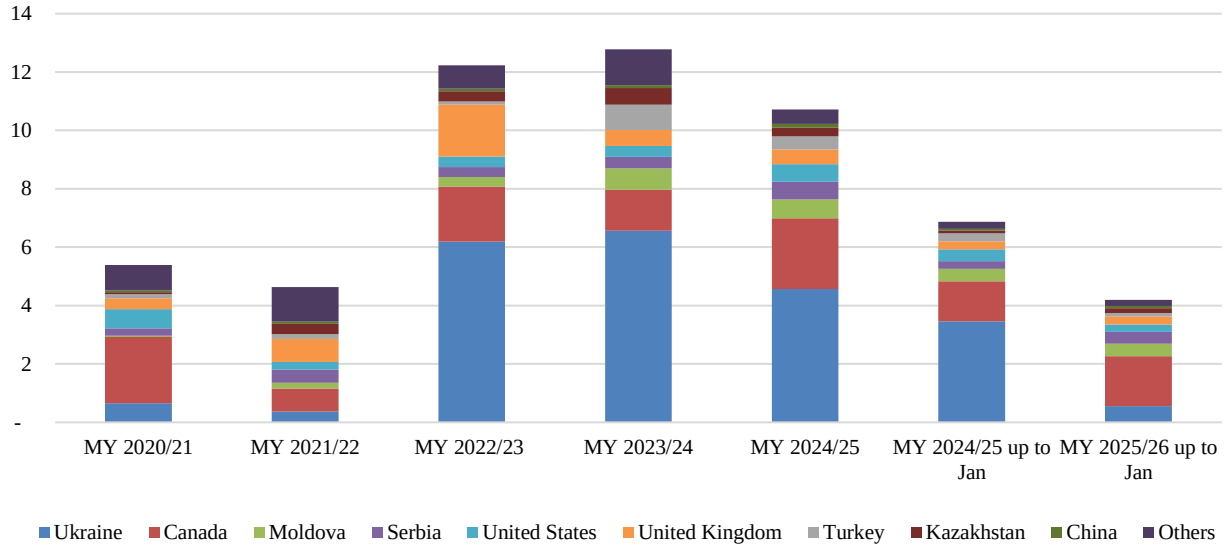
Main third country suppliers to the EU in MY 2025/26 include Ukraine, which accounts for a significant share of the bloc's wheats imports, followed by Moldova and Canada, which supply durum wheat to Italy. Other origins include Serbia and United Kingdom. Imports from the United States usually cover the gap left by the low availability of high protein wheat within the EU. The EU has not imported any significant amount of Russian wheat since MY 2023/24.

Supported by a large wheat supply and competitive prices, EU wheat exports in MY 2026/27 are anticipated at 32 MMT, only marginally lower than in MY 2025/26. Current season's exports are set to see a rebound from the low level of MY 2024/25, when supply was limited due to poor harvest. Main wheat-exporting EU Member States include France, Romania, Germany, Poland, Bulgaria, and the Baltic Countries. In MY 2026/27 France is expected to regain its rank as the largest EU wheat exporter, which it had lost in MY 2024/25, closely followed by Romania, Bulgaria and Poland. The Romanian port of Constanța is poised to become the largest wheat exporting port in the EU, surpassing Rouen in France.

Morocco, Algeria, Egypt, Saudi Arabia, and United Kingdom are expected to be the EU's largest wheat customers in MY 2025/26. Algeria used to be a steady and large customer of French milling wheat, given its significant shipping cost advantage. However, since 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 Romanian, Bulgarian and Russian wheat. Sub-Sahara countries such as Nigeria, Cote d'Ivoire, Cameroon, and South Africa will remain key customers of EU wheat in MY 2025/26. The United States is also a large importer of EU wheat and wheat products. On the other hand, China is again anticipated to purchase a minimal amount of EU wheat in MY 2025/26 given the strong competition from Canada, Australia, Russia, and Kazakhstan during the first six months of MY 2025/26.

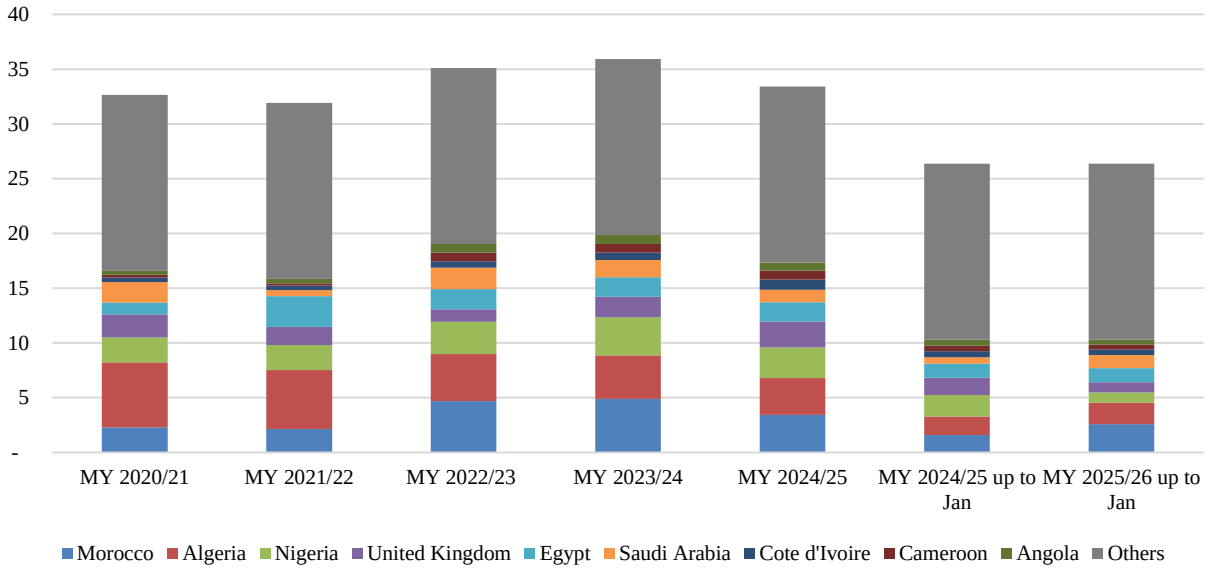
The smaller expected crop and stable demand could help lower the ending stocks in MY 2026/27. Supported by larger wheat supply, and despite lower imports and higher exports and uses, EU wheat ending stocks in MY 2025/26 are expected to increase, particularly due to the significantly higher stocks located in Poland, Germany and France.

Figure 8. Main Wheat Suppliers to the EU (1,000 MT)



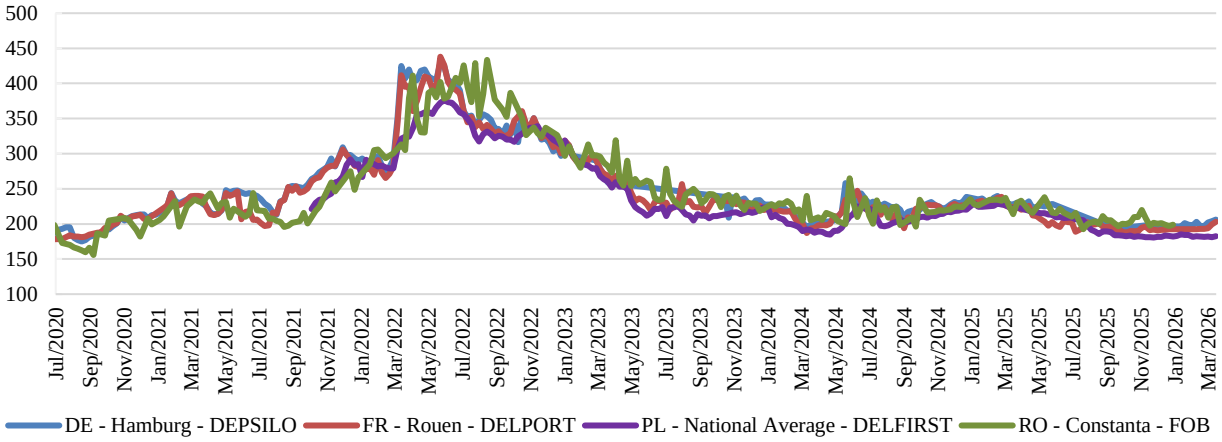
Source: Trade Data Monitor, LLC.

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



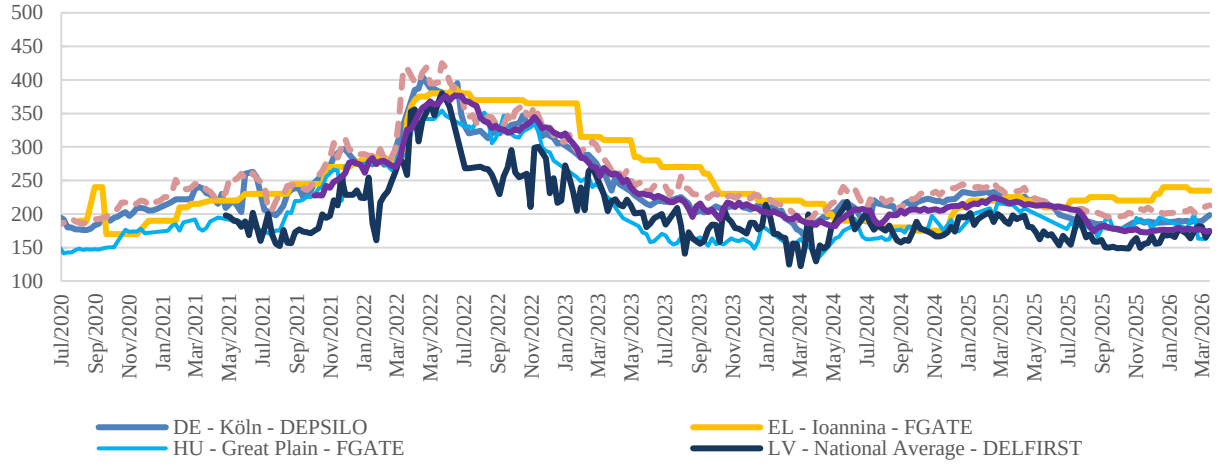
Source: Trade Data Monitor, LLC.

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



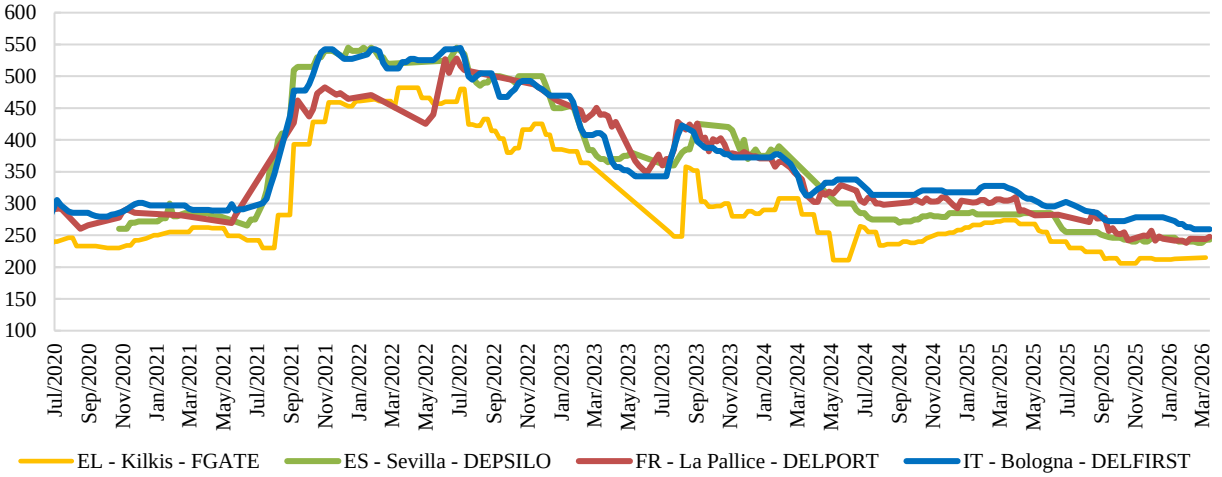
Source: EU Commission based on Member States notification according to Regulation (EU) 2017/1185.

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.

Section II. Coarse Grains

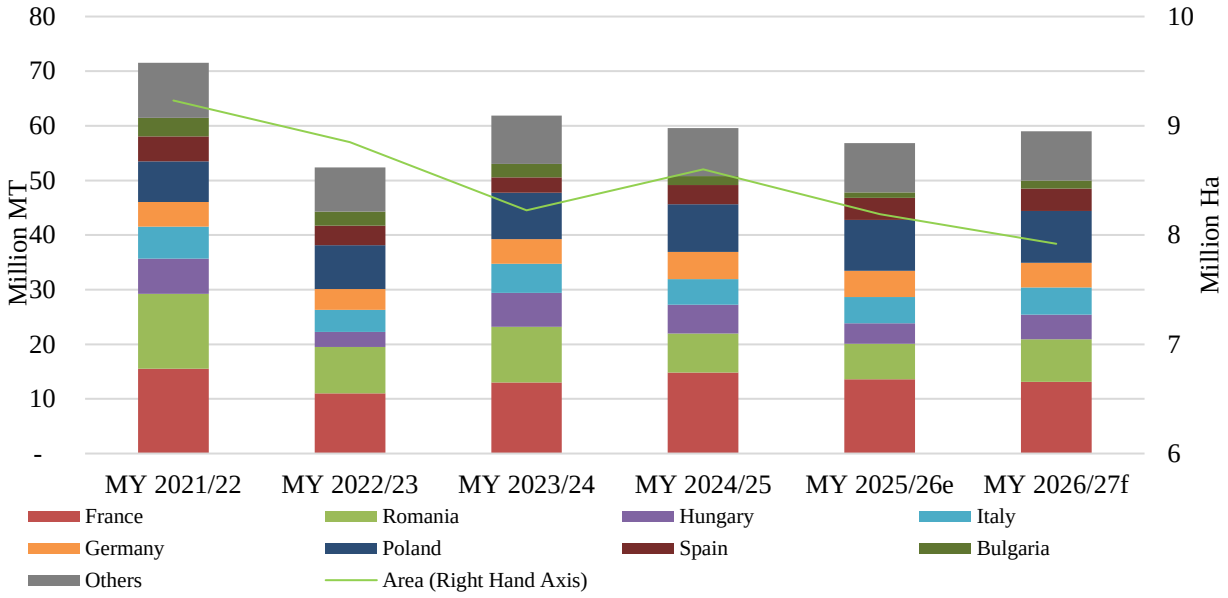
Corn

Table 3. Production, Supply and Distribution – Corn

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
European Union	USDA Official	New Post	USDA Official	USDA Official	New Post	USDA Official
Area Harvested (1000 HA)	8,602	8,600	8,190	8,200		7,900
Beginning Stocks (1000 MT)	7,294	7,294	6,181	5,812		5,052
Production (1000 MT)	59,591	59,600	56,799	57,000		59,000
MY Imports (1000 MT)	18,757	18,759	19,500	18,300		18,500
TY Imports (1000 MT)	18,757	18,759	19,500	18,300		18,500
Total Supply (1000 MT)	85,642	85,653	82,480	81,112		82,552
MY Exports (1000 MT)	2,761	2,761	1,800	1,800		2,000
TY Exports (1000 MT)	2,761	2,761	1,800	1,800		2,000
Feed and Residual (1000 MT)	56,300	56,000	54,500	53,800		54,700
FSI Consumption (1000 MT)	20,400	21,080	20,300	20,460		20,450
Total Consumption (1000 MT)	76,700	77,080	74,800	74,260		75,150
Ending Stocks (1000 MT)	6,181	5,812	5,880	5,052		5,402
Total Distribution (1000 MT)	85,642	85,653	82,480	81,112		82,552
Yield (MT/HA)	6.9276	6.9302	6.9352	6.9512		7.4684
(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 2026/2027 = October 2026 - September 2027						
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 2026/27 to the historically low level of 7.9 million Ha, reinforcing the trend registered in EU's corn area over the past 10 years. This trajectory is driven by diminishing profitability, poor yields, and strong global competition. Rising nitrogen fertilizers and fuel prices this spring campaign may play a role in farmers' decision planting. Similarly, as drought risk is an important factor in planting decisions, corn continues losing ground against the more drought-tolerant sunflower crop. The absence of an emergency authorization for neonicotinoids in the EU since 2018 may be another discouraging factor, particularly in Romania, where the government had granted an exemption every year, except 2026.

Romania, which accounts for a fifth of the EU corn area, projects a further decline, along with the other top producers, France, Hungary, Germany, Bulgaria, and Croatia. In many instances, this is a consequence of the losses incurred by farmers over the past few years when yields were diminished by summer heat and prolonged dryness. Conversely, Poland is consolidating its position as the third largest EU grower in terms of corn area, anticipating a further increase in the area, driven by the smaller sugar beet area. Spain projects a relatively stable planted area sustained by satisfactory level of the water reservoirs which permits irrigation.

While biotech corn is imported widely into the EU, biotech corn planting is limited to Spain and Portugal. While other Member States - such as Romania - which did not opt-out from GE crops cultivation, the rigorous traceability requirements and difficulties in marketing crops discouraged farmers from cultivating GE corn.

Abundant precipitation in the fall and good snow cover over the winter significantly improved the soil moisture and the underground water reservoirs across the EU. While these conditions should boost plant germination and good start of the growing cycle, additional rainfall is needed to support plant development in the following months.

Overall, production is anticipated to rebound in MY 2026/27 on the back of improved yields. That said, France – the EU's leading corn producer, Germany and Austria, anticipate a lower harvest based on anticipated reduced yields or diminished areas. Meanwhile Romania, Hungary, and Bulgaria - which combined account for a quarter of the EU production - foresee significant production rebounds due to improved yields notwithstanding smaller area planted. Additionally, Italy, Poland, Greece, and Slovakia also expect larger crops. The spikes in fertilizer prices and fuel in March, already on an upward trajectory, may be another factor shaping the production level this season, as due to the lingering fragile financial situation, farmers may consider reducing the applications. These preliminary estimates may deteriorate if dryness and warmth hit the plants in the most critical phases of growing.

EU's total corn consumption is forecast to grow and exceed 75 MMT in MY 2026/27. The increase is driven by increase feed consumption, as all the other components – seed, food and industrial – are estimated to decrease or stagnate. With a share of 70 percent in total consumption, corn use in feed is forecast to grow in MY 2026/27, still being among the lowest feed levels in the past 10 years. The anticipated larger production combined with the positive prospects for the poultry sector offset the long-term challenges faced by the livestock sector in terms of animal disease risks, animal welfare requirements, and unpredictability of the export markets do not ensure a significant recovery in feed consumption.

Corn competitiveness against other grains is expected to increase in Spain, Romania, France, Hungary, Bulgaria, and Italy. Meanwhile, Portugal, Germany, the Netherlands, Denmark and Austria are forecasting reductions of corn feed utilization, while Poland projects stable consumption. Food use is anticipated stable and so is the industrial use, where moderate increases in Hungary and Romania due to improved corn availability, respectively expanded capacity, are mitigated by the reductions estimated in Poland, and Belgium.

As a result of a lower crop and abundance of alternative grain crops, the overall corn consumption is set to decrease in MY 2025/26. Food and starch manufacturers secured their raw materials often at a premium price, particularly in the EU's south-east, where the crop was lower and reportedly downgraded by quality issues such as aflatoxins. The falling livestock numbers impact the overall EU feed corn demand, which is foreseen to drop marginally. The favorable soybean meal prices and the positive prospects for broiler and egg production prevent corn feed from going down even more sharply.

A lower feed utilization compared to the previous year is observed in France, Spain, Hungary, Germany, Belgium and Bulgaria, mostly tied to a lower crop, while an increase in corn incorporation in feed is noted in Portugal and Poland, supported by poultry production. In the Netherlands, corn use is at maximum level, driven by buoyant egg and broiler production, in contrast with the livestock production.

The industrial use of corn is expected to decrease in MY 2025/26 compared to the previous season, though the recent soaring fuel prices made margins in bioethanol production more attractive, despite corn prices becoming firmer. In the long run, the inflationary effect of the rising energy prices has the potential to curb the fuel demand and consequently the bioethanol demand, unless compensated by higher incorporation of bioethanol (e.g. E85 in France)[4].

MY 2026/27 imports are anticipated to only marginally rise from the previous season despite lower crop. The reduced import demand is driven by the large availability of alternative ingredients available for feed purposes, which is the main driver for corn imports. Spain remains the leading importer, accounting for approximately a third of total imports, followed by Italy, the Netherlands, Portugal, and

[4] E85 is cheaper than gasoline due to more favorable taxation. At the EU level is available at commercial scale in France. Other EU Member States with E85 available to a much smaller extent include Sweden and Finland. Early surveys tend to indicate that E85 consumption is on the rise in several EU countries, notably France, since late February 2026.

Ireland. Ukraine is anticipated to remain the main supplier to the EU, due to its price competitiveness, dictated by crop size and the geographical position. Even with a lower area planted[5] to corn, given the ample available stocks from the previous season, the United States is foreseen to consolidate its position as the second-largest supplier to the EU, surpassing Brazil again.

In spite of the lower domestic corn crop, imports are expected to drop in MY 2025/26, reflecting the remarkable supply of alternative grains. Spain is the largest importer, with about one third of EU corn imports, trailed distantly by Italy, the Netherlands, Portugal, and Ireland. Due to the slow pace of exports, generated by the delayed harvest, farmer retention and numerous attacks on port facilities, Ukrainian shipments dropped in the first four months of the current season, but an accelerated export pace is expected for the remainder of the season. Meanwhile, the United States has strengthened its position on the EU market. Supported by the U.S. bountiful harvest, EU corn imports from the Unites States soared during the first four months of the current season, from 1 MMT a year ago to 27 MMT - currently on a par with Ukraine. The major recipients of the U.S. corn shipments were Spain, followed by Portugal, Ireland, Italy, and the Netherlands, given their robust livestock sectors, and their comparatively limited in-country grain supply. Currently ranking the third among suppliers, Brazil reduced its presence in the EU in the past two years, in favor of other destinations, such as Iran, Saudi Arabia, Iraq. If the current geopolitical situation extends to the summer months, when the bulk of Brazilian corn imports to the Middle East take place, risks associated with shipments may lead to part of the exports being redirected to European market. Canada is also a notable supplier to the EU, while Moldova is a small, but steady supplier.

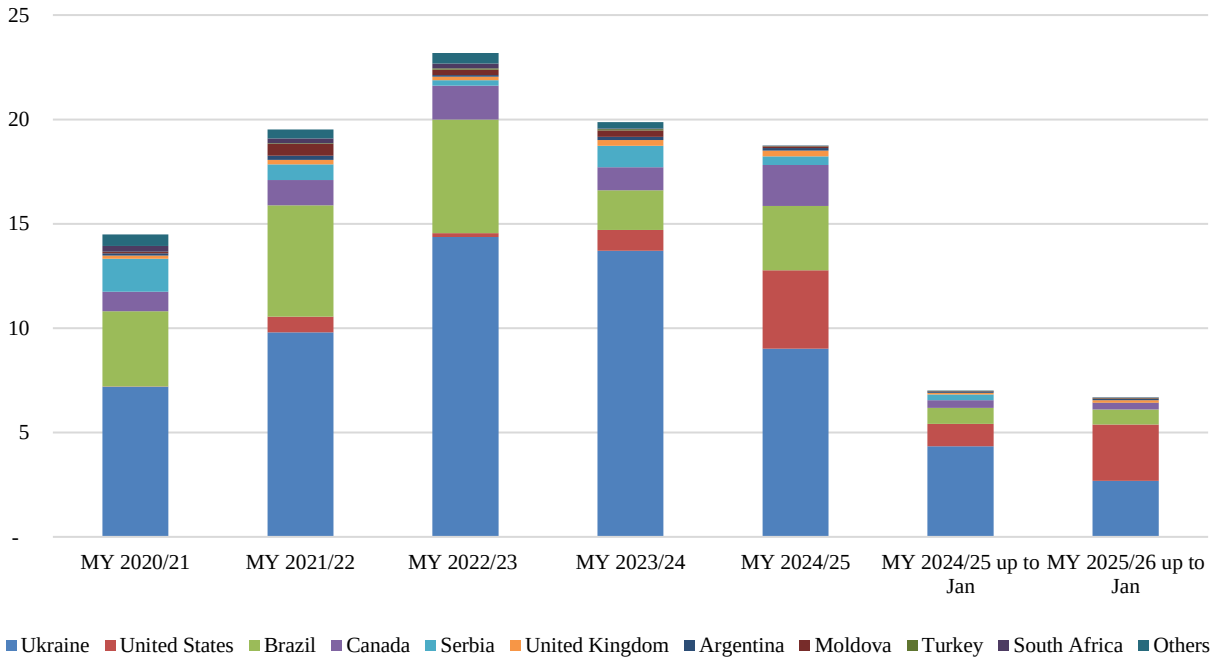
The modest production recovery in MY 2026/27 is reflected in year-on-year growth in exports, though from a very low basis. The increase is almost entirely attributed to Romania, the leading EU corn exporting country, due to a partial recovery in production and its geographical advantage to supply the traditional markets in Middle East and North Africa. Poland and Bulgaria also predict an export growth, supported by improved competitiveness, while France is anticipated to reduce its export in MY 2026/27 because of a lower crop. EU's traditional trading partner, the United Kingdom, is anticipated to remain a steady market.

In MY 2025/26, exports are anticipated to drop significantly hitting their lowest level in 15 years, because of the limited supply in the main exporting countries, namely, Romania, France and Bulgaria. EU's key-export destination, particularly for France, is the United Kingdom, which accounted for a third of the EU exports during the first four months of the current season. Middle East and North Africa destinations absorbed over forty percent of exports. The current conflict in the Persian Gulf and the risk associated with shipments to this region may force traders to divert exports to other destinations. The remaining balance is directed to other markets, such as Norway, Switzerland and countries from the Balkan region.

[5] For additional details, please consult U.S. Prospective Plantings Report March 2026.

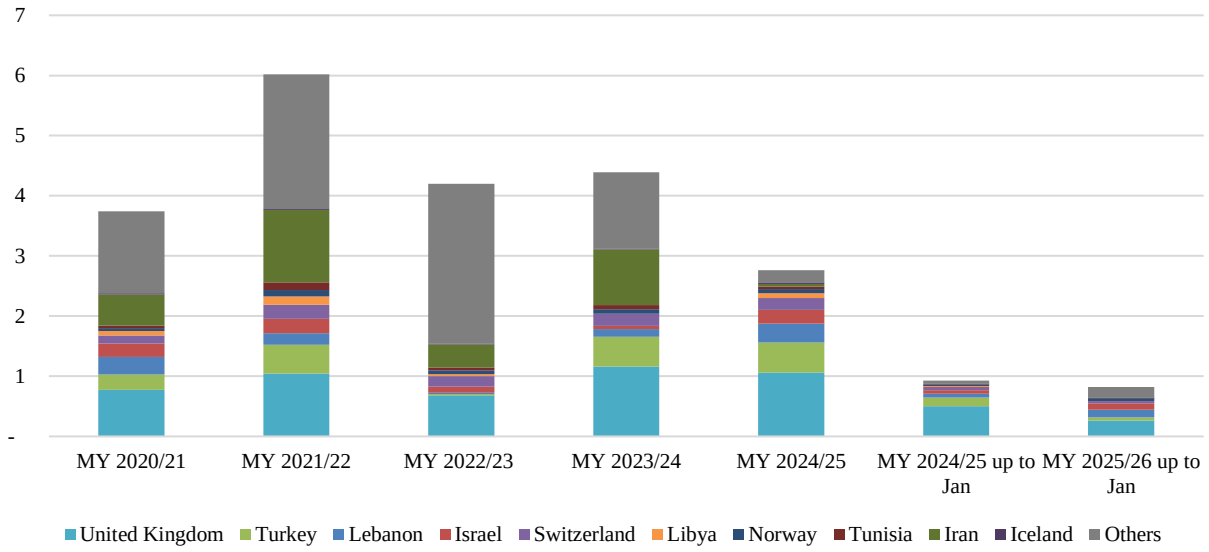
A modest recovery in inventory is expected at the end of MY 2026/27 supported by the domestic crop rebound and increased imports, despite the higher feed utilization. Conversely, the balance is projected to be very tight in MY 2025/26 due to reduced domestic corn production and weaker imports in the context of ample supplies of EU winter grains.

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



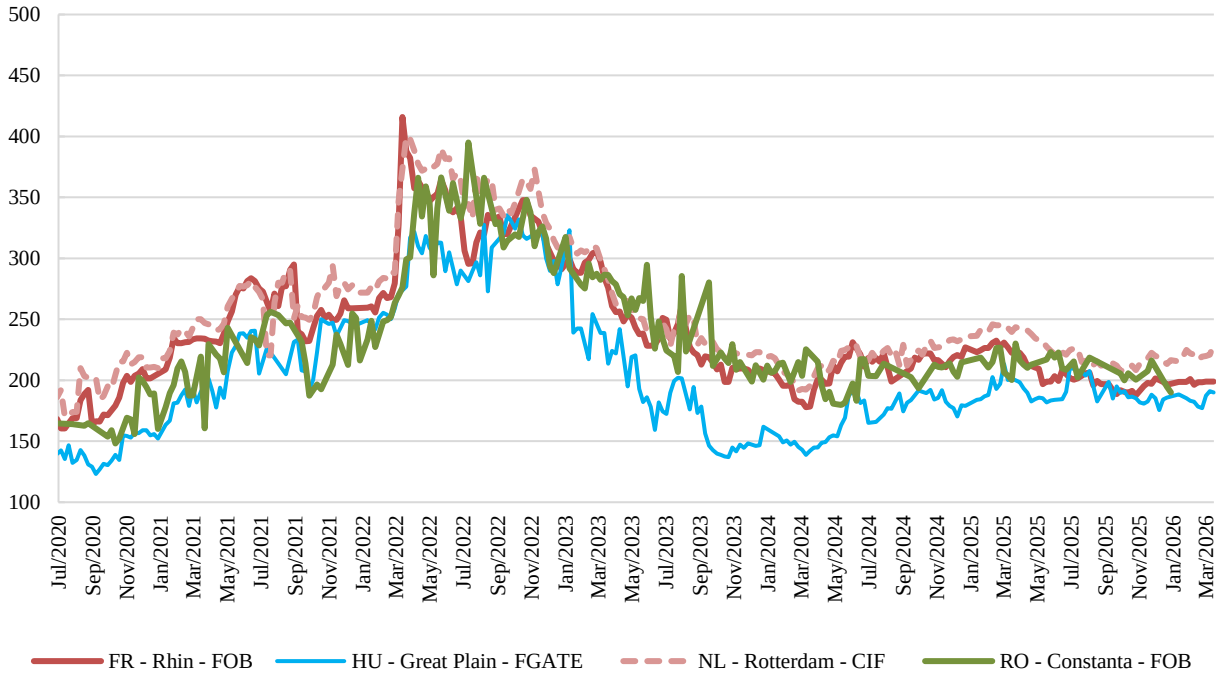
Source: Trade Data Monitor, LLC.

Figure 15. Main Export Destinations for EU Corn (Million MT)



Source: Trade Data Monitor, LLC.

Figure 16. EU Corn Prices (Euros/MT)



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

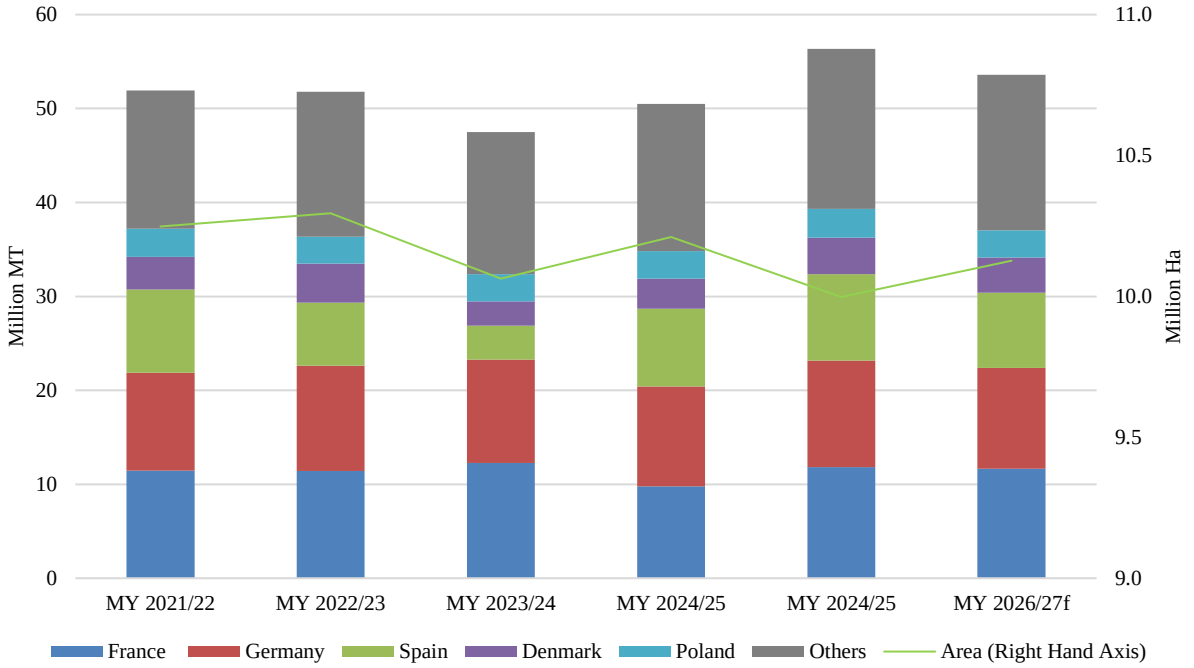
Barley

Table 4. Production, Supply and Distribution – Barley

Barley	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	10,234	10,211	10,021	9,998		10,130
Beginning Stocks (1000 MT)	5,415	5,415	5,962	5,547		7,011
Production (1000 MT)	50,519	50,475	56,387	56,344		53,100
MY Imports (1000 MT)	1,228	1,228	700	680		700
TY Imports (1000 MT)	1,030	1,026	800	700		700
Total Supply (1000 MT)	57,162	57,118	63,049	62,571		60,811
MY Exports (1000 MT)	6,200	6,201	7,800	7,700		7,650
TY Exports (1000 MT)	7,321	7,346	7,600	7,600		7,600
Feed and Residual (1000 MT)	32,400	32,910	35,500	35,200		33,950
FSI Consumption (1000 MT)	12,600	12,460	12,900	12,660		12,780
Total Consumption (1000 MT)	45,000	45,370	48,400	47,860		46,730
Ending Stocks (1000 MT)	5,962	5,547	6,849	7,011		6,431
Total Distribution (1000 MT)	57,162	57,118	63,049	62,571		60,811
Yield (MT/HA)	4.9364	4.9432	5.6269	5.6355		5.2419
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Figure 17. EU Barley Area and Production



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

The EU barley area in MY 2026/27 is expected to amount to 10 million Ha, up from the previous season. EU farmers' sowing decisions reflect a combination of price signals, policy changes, input costs, weather expectations, and crop rotation requirements. In drier and heat-prone regions of the EU, and after consecutive years of drought in Central Europe, barley's comparatively good performance under stress has encouraged increase area planted to barley at the expenses of reduced corn plantings.

Tightening fertilizer regulations and fertilizer price volatility, linked to fossil fuel markets, continue to pressure farmers to select crops that perform reliably under lower input regimes. Barley's relatively modest nitrogen requirement compared with high-yield wheat or corn enhances its attractiveness. As a result, a moderate increase in barley area is expected in most Member States, except for Spain, where barley area is projected to decline due to the persistent precipitation during planting season.

EU barley production is forecast to decline and amount to 53.1 MMT. Despite a moderately expanded area and generally favorable winter weather, including abundant precipitation across most of Europe. During cold spells, adequate snow cover protected the well-established crops, and winter-kill risk remained limited even in northern regions, despite minimum temperatures below -20°C. Yields, however, are expected to return to average levels following the exceptional performance in MY 2025/26, with significant reductions anticipated particularly in Spain and Germany.

Total barley consumption in MY 2026/27 is projected to decrease to approximately 46.7 MMT down from the 47.8 MMT MY 2025/26 driven its extensive use for feed purposes.

For MY 2026/27, barley demand from the livestock sector is expected to decline sharply to 33.9 MMT, after peaking in MY 2025/26, reflecting lower barley production, improved corn supply, and reduced

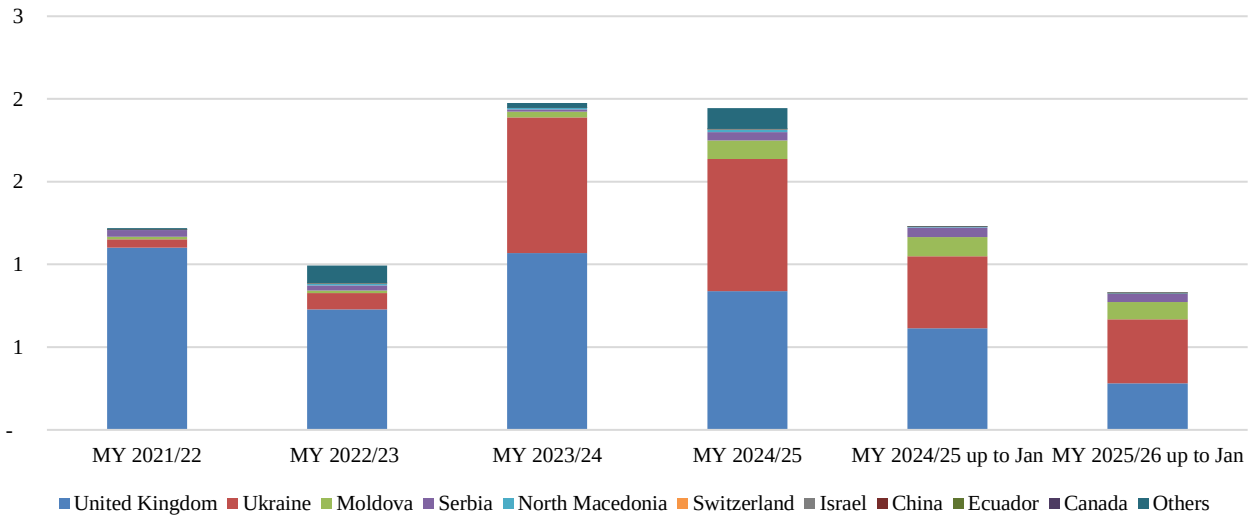
substitution needs. Lower barley feed use is anticipated in Spain, France, Germany, Denmark, and the Netherlands in line with the anticipated lower availability. While chicken meat production is forecast to grow marginally, cattle inventories, calf crops, and pork output are expected to contract in the coming marketing year. Strict sustainability requirements, emissions and nitrogen regulations, and tighter animal welfare standards, animal diseases outbreaks are constraining livestock expansion and thus limiting overall feed consumption.

In the aftermath of tight global supplies in the previous season, in MY 2025/26 barley took a central role in swine and poultry diets, given ample domestic availability and temporarily competitive prices relative to corn. Feed barley demand is particularly strong in large barley producers such as Spain, Germany, France, Denmark, and Central (Hungary) and southeast European countries (Romania and Bulgaria), where poor corn harvests prompted substitution to barley. At the same time, abundant EU wheat supplies and price competitiveness in feed rations have capped further gains in barley use; and livestock sector demand for barley is beginning to slow.

Conversely, food, seed, and industrial (FSI) use of barley is forecast to rise again in MY 2026/27, supported by modest growth in the starch industry, and stable, albeit limited, demand for food and pharma grade ethanol, barley protein, wet fiber, and other co-products in the context of expanded processing capacity. The outlier trend is barley consumption by the brewing industry, which seems to be losing ground.

For MY 2026/27, EU barley imports are expected to remain broadly unchanged at around 0.7 MMT, supported by high beginning stocks and reduced reliance on extra-EU supplies. Similarly given the ample domestic supplies, EU barley imports in MY 2025/26 are projected to remain low.

Figure 18. Main Barley Suppliers to the EU (Million MT)



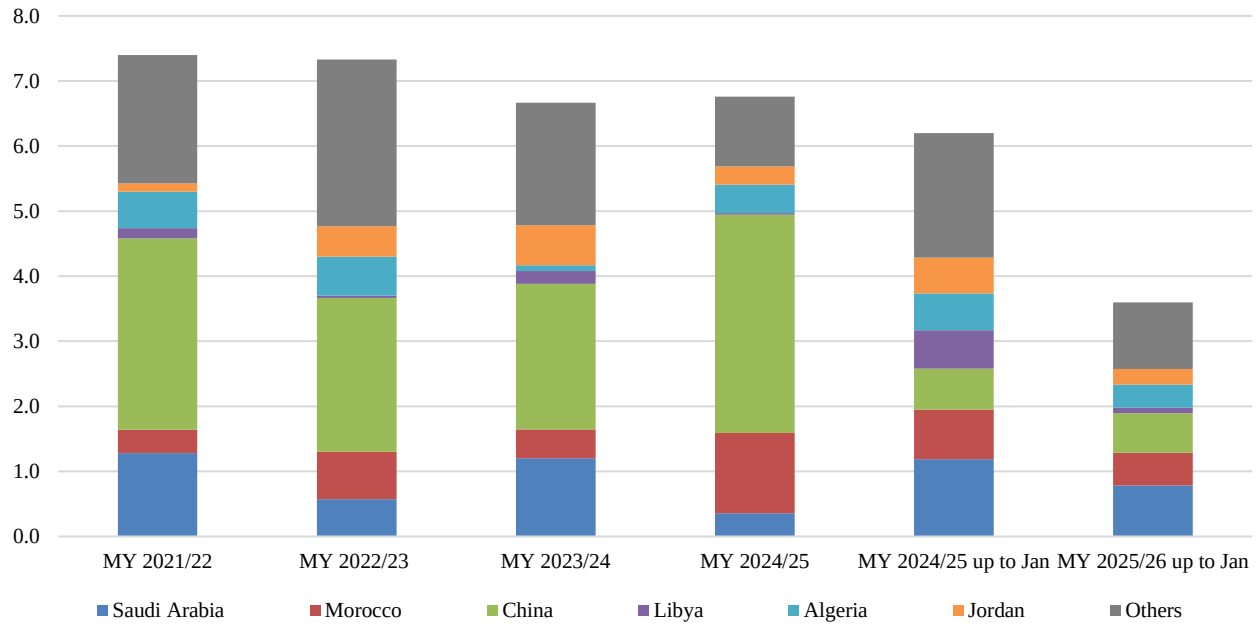
Source: Trade Data Monitor, LLC.

EU barley exports in MY 2026/27 are forecast to ease slightly from the peak of MY 2025/26 but remain robust at approximately 7.6 MMT. In MY 2025/26, EU barley exports in MY 2025/26 are projected at a five-year high of about 7.7 MMT, driven largely by demand from the Middle East, China, and, to a lesser extent, North Africa.

The EU, led by France, Germany, and Romania, shows strong export potential amid reduced competition from traditional suppliers such as Australia and Ukraine in MY 2025/26. However, since late February the market situation has changed reflecting a growing global surplus and intensifying competition from Southern Hemisphere origins. China significantly increased its purchases of EU barley in the first half of the marketing year to compensate for domestic shortfalls caused by adverse weather and to meet rising feed demand in its expanding pork and poultry sectors. Türkiye and several Middle Eastern buyers also turned to EU origins, partly due to continuing disruptions in Black Sea trade linked to geopolitical tensions. As a result, export activity began MY 2025/26 on a strong note, although increasing competition from Southern Hemisphere suppliers, particularly from Australia and Argentina, is tempering EU export momentum, especially toward China and Saudi Arabia, since early 2026. Argentine barley remains the most price-competitive. Consequently, French exports are slowing, and the EU's competitive advantage erodes as global supplies expand.

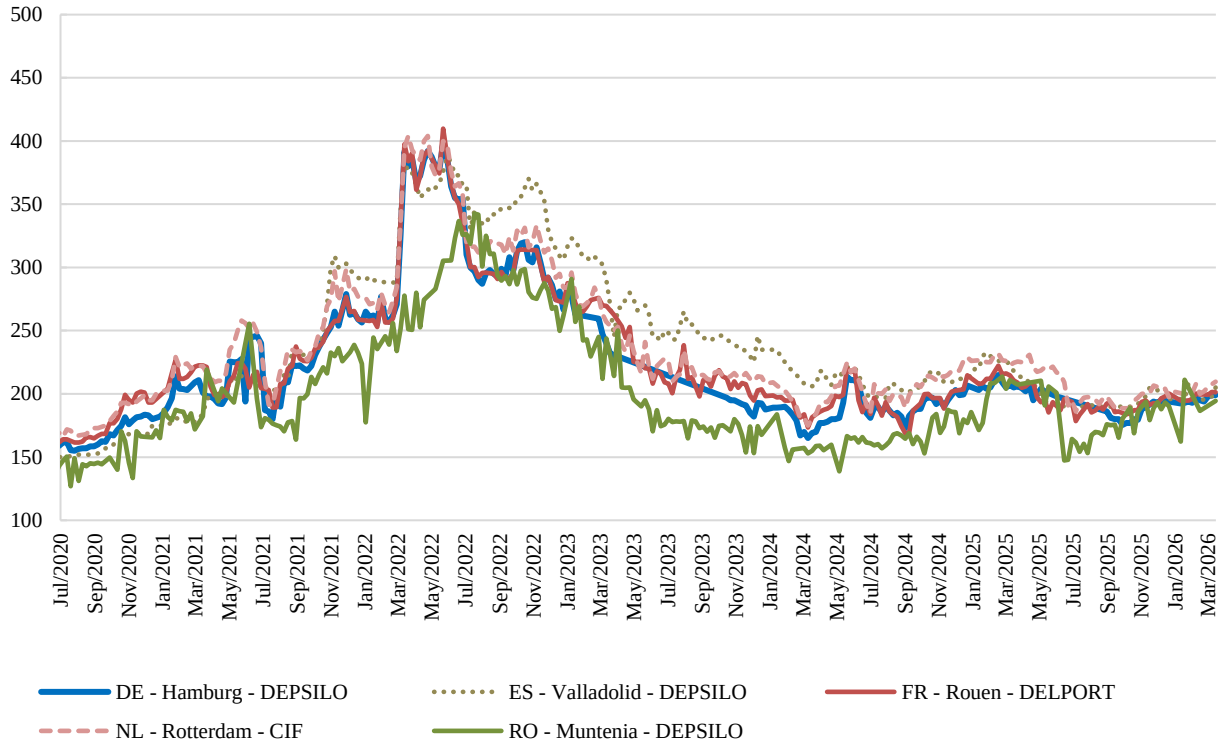
MY 2026/27, stocks are down from previous season but remain comfortable, despite the projected reductions in barley production and feed use. In MY 2025/26, due to higher production and improved availability of wheat, largely preferred by compound feed manufacturers, EU barley ending stocks are forecast to rebound sharply from prior lows to one of the highest levels in the past decade. Large inventories are foreseen in Spain, France, and Germany.

Figure 19. Main Export Destinations for EU Barley (Million MT)



Source: Trade Data Monitor, LLC.

Figure 20. EU Feed Barley Prices (Euros/MT)



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

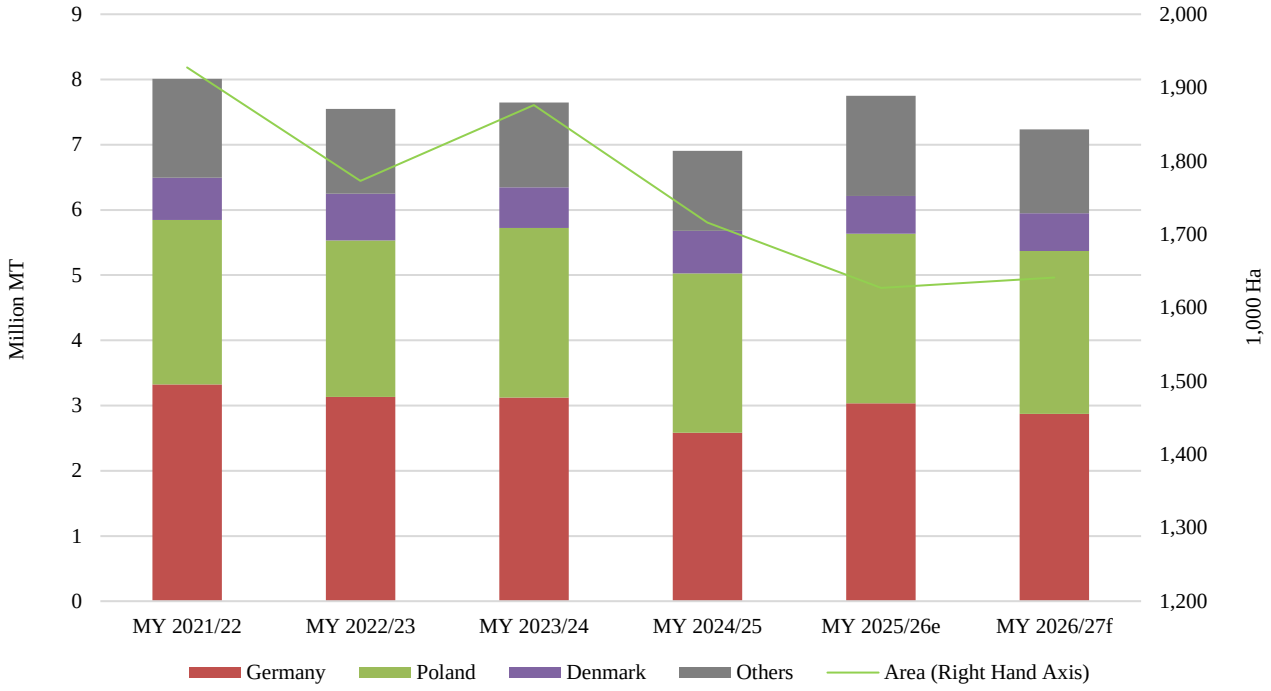
Rye

Table 5. Production, Supply and Distribution – Rye

Rye	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1,716	1,716	1,627	1,627	-	1,640
Beginning Stocks (1000 MT)	1,313	1,313	912	811	-	1,139
Production (1000 MT)	6,907	6,907	7,749	7,750	-	7,230
MY Imports (1000 MT)	8	8	20	10	-	20
TY Imports (1000 MT)	10	10	20	10	-	20
Total Supply (1000 MT)	8,228	8,228	8,681	8,571	-	8,389
MY Exports (1000 MT)	91	91	125	55	-	85
TY Exports (1000 MT)	59	59	125	50	-	80
Feed and Residual (1000 MT)	4,300	4,288	4,400	4,400	-	4,210
FSI Consumption (1000 MT)	2,925	3,038	2,950	2,977	-	2,975
Total Consumption (1000 MT)	7,225	7,326	7,350	7,377	-	7,185
Ending Stocks (1000 MT)	912	811	1,206	1,139	-	1,119
Total Distribution (1000 MT)	8,228	8,228	8,681	8,571	-	8,389
Yield (MT/HA)	4.0251	4.0251	4.7628	4.7634	0	4.4085
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Figure 21. EU Rye Area and Production



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

In MY 2026/27, EU rye planted area is estimated to have increased slightly from last year driven by larger plantings in Poland, Germany. These two countries are main producers of rye in the EU and account for over 70 percent of the EU's rye area. The increased rye area represents return to the average following last year's reduced plantings. In Denmark and Spain area planted to rye in MY 2026/27 is estimated below previous years' level and in the case of Sweden it remains unchanged.

EU's rye production is forecasted to decrease to 7.2 MMT in MY 2026/27, assuming average weather conditions and yields returning to normal, following the exceptional yields of the MY 2025/26 in EU producing Member States such as Poland and Germany. In Denmark, both lower yields and acreage are forecast to drive production expectations down. Adverse weather conditions in the fall - when heavy rainfalls impeded the field work - are expected to undermine yields in Finland. Particularly bountiful production is forecast among numerous smaller producers like France, Latvia, Bulgaria, Grece or Italy. Conversely, in some countries, such as Poland, Czechia, and Slovakia, rye was planted later than usual, which may reduce yields. In Poland, the later planting was due to a late corn harvest. In Czechia and Slovakia, this was due to difficult autumn weather conditions during field work.

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. As of the beginning of March, in the main rye producing countries in the EU, crops remained in good condition after winter. Despite the very cold winter, no major winterkill was reported by the main producers, thanks to the relatively heavy snow cover. In Poland and Romania, melting snow and floodwaters forming in fields pose a threat to cereal crops. This also hinders the application of fertilizers. An additional factor contributing to the projected decline in yields in Poland is the anticipated decline in the use of fertilizers and plant protection products, due to both high prices and periodic supply shortages.

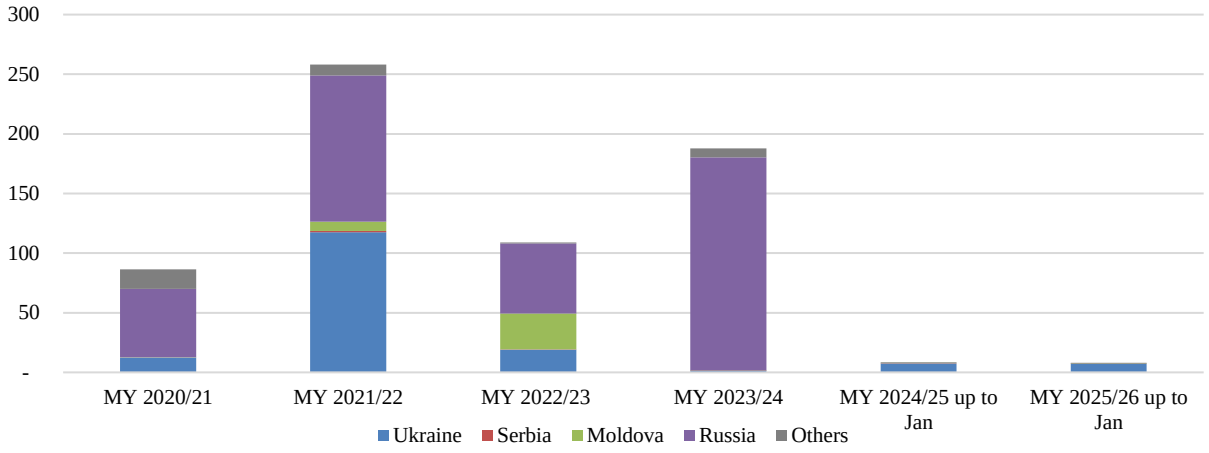
In MY 2026/27, rye feed use is forecast below last MY 2025/26 levels and is expected to reach 4.2 MMT. Rye feed use in the EU remains mainly a function of production and is largely consumed as on-farm feed. Among the main rye producing countries only Germany and France forecast increase in feed use for MY 2026/27, while most EU countries will remain flat or downward. The largest decrease in feed use of rye in my 2026/27 is predicted in Poland and Spain, following from a very successful MY 2025/26 rye harvest.

(FSI) In MY 2026/27, FSI consumption is expected to be slightly down, driven by a lower food use. Poland's and Germany's industrial rye use, mostly for bioethanol and biogas production purposes, remains flat. Rye human consumption is forecast to remain unchanged in most countries, except of Romania, where it will slightly diminish.

Domestic rye is largely traded within the EU and only two percent of production is exported outside the bloc. The United States, where rye is used to produce whiskey, accounts for nearly 80 percent of the EU's rye exports. Other destinations of EU rye to much lesser extent include Norway, Japan, and United Kingdom.

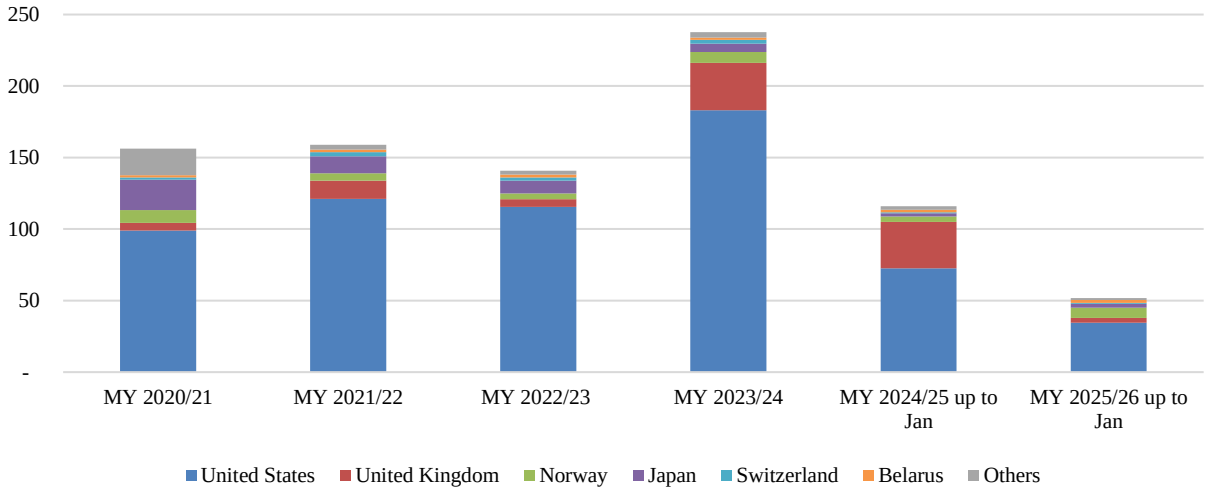
The forecast for EU's MY 2026/27 anticipates lower stocks than in the current season, however still at a very high level. Ending stocks are expected to decrease due to forecast lower production. EU's rye ending stocks estimated for MY 2025/26 are much higher than last year, due to the abundant harvest in 2025. Rye stocks are concentrated in large producing Member States such as Germany, Poland, and to a much lesser extent in Latvia, Estonia and Denmark.

Figure 22. Main Rye Suppliers to the EU (1,000 MT)



Source: Trade Data Monitor, LLC.

Figure 23. Main Export Destinations for EU Rye (1,000 MT)



Source: Trade Data Monitor, LLC.

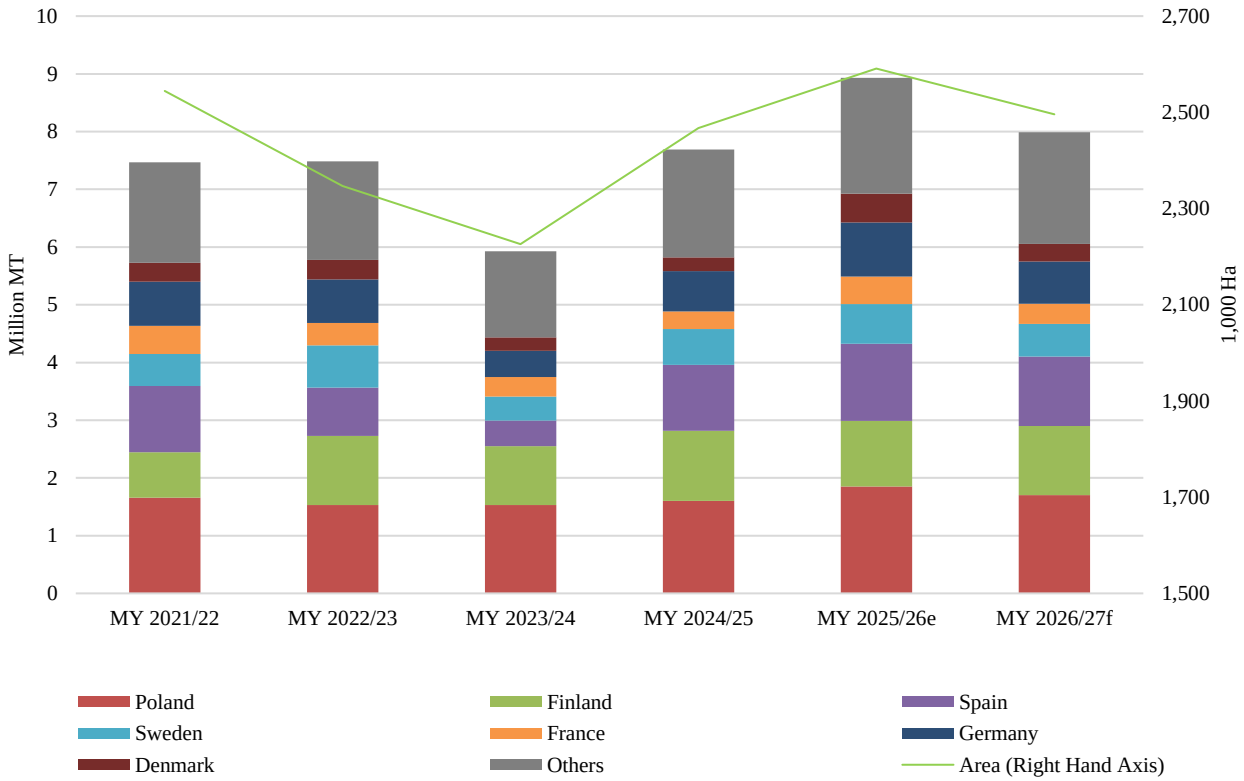
Oats

Table 6. Production, Supply and Distribution – Oats

Oats	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
European Union	USDA Official	New Post	USDA Official	USDA Official	New Post	USDA Official
Area Harvested (1000 HA)	2,460	2,467	2,581	2,591		2,508
Beginning Stocks (1000 MT)	253	253	537	553		1,347
Production (1000 MT)	7,686	7,688	8,920	8,944		8,000
MY Imports (1000 MT)	64	64	50	50		50
TY Imports (1000 MT)	73	73	75	90		50
Total Supply (1000 MT)	8,003	8,005	9,507	9,547		9,397
MY Exports (1000 MT)	91	93	150	150		155
TY Exports (1000 MT)	85	85	150	150		100
Feed and Residual (1000 MT)	5,850	5,816	6,700	6,470		6,360
FSI Consumption (1000 MT)	1,525	1,543	1,575	1,580		1,585
Total Consumption (1000 MT)	7,375	7,359	8,275	8,050		7,945
Ending Stocks (1000 MT)	537	553	1,082	1,347		1,297
Total Distribution (1000 MT)	8,003	8,005	9,507	9,547		9,397
Yield (MT/HA)	3.1244	3.1163	3.456	3.4519		3.1898
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Figure 24. EU Oats Area and Production



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

In MY 2026/27, EU oats planted area is forecast to decrease from MY 2025/26 however it still remains at a high level compared to previous years. European farmers show interest in growing oats due to expected relatively high profitability of the crop in comparison with other types of spring grains.

With the smaller area planted and assuming average long-term yields, oats production in the EU is expected to amount to 8.0 million MT, well below the 8.9 million MT estimated for MY 2025/26. Lower oat harvests are expected for all major oat producers in the EU such as Poland, Spain, Sweden, and Germany. Among major EU producers, only Finland is expected to register a production increase. The main factor in the forecast decline in production is flat, or a slightly lower, area planted and yields combing back to average levels. The exception is in Finland, Denmark and Sweden, where the area sown with oats is lower, but yields are forecast higher. Oats harvest in these countries looks very promising.

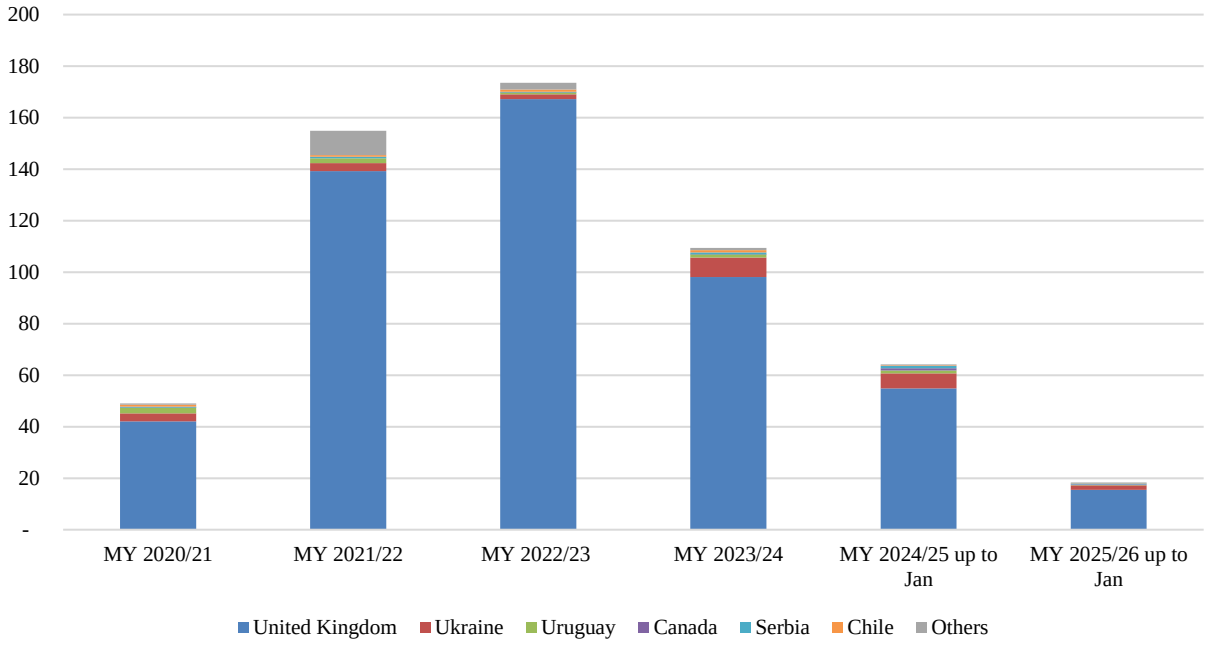
In MY 2026/27, after last year's uptick, feed consumption of oats is forecast to decline in line with the lower projected harvest. Feed consumption of oats occurs primarily on farms. Oats feed use is expected to decrease, in major producers' countries, except in Poland, where it is anticipated to remain flat.

In MY 2026/27, EU oats FSI consumption is estimated to be almost in line with the previous year. Only Germany predicts lower oats industrial use, while human consumption is forecast higher, mostly due to increasing popularity of oatmeal and oat drinks as dairy alternative.

MY 2026/27 oats exports are projected at higher levels than in MY 2025/26, mostly due to lower EU domestic consumption in the feed sector. Oats are traditionally traded within the EU. Export volumes to non-EU countries are stable and usually originate from the Nordic and Baltic States, like Latvia, Finland, and Sweden. They are mainly directed to third countries like Algeria, the United States, Norway, United Kingdom, or Switzerland. Major EU oats producers prioritize trade and adjust their domestic use to the foreign demand.

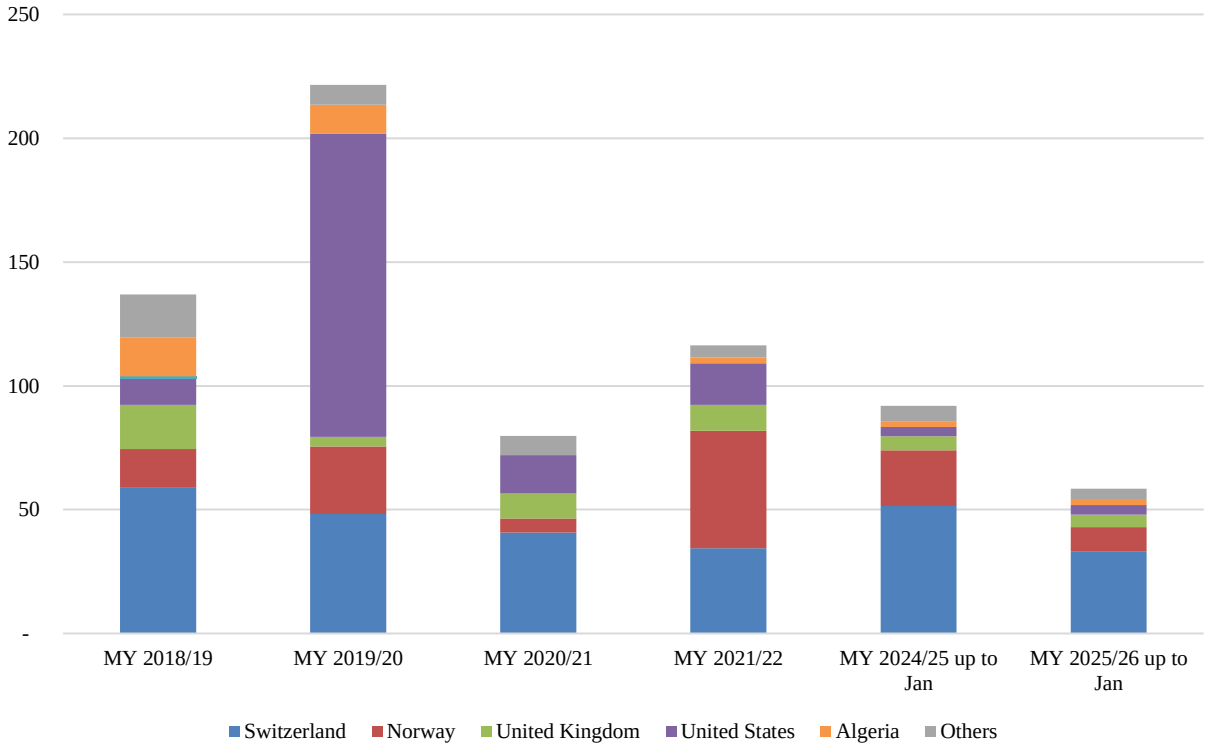
In MY 2026/27, the EU is expected to reduce stock compared to MY 2025/26, albeit supplies on hand are still forecast at a very high level. Most EU Member States built stocks after very good 2025 harvest. In Poland, the main producer of oats in the EU, stocks are forecast to decline due to the expected increase in exports.

Figure 25. Main Oats Suppliers to the EU (1,000 MT)



Source: Trade Data Monitor, LLC.

Figure 26. Main Export Destinations for EU Oats (1,000 MT)



Source: Trade Data Monitor, LLC.

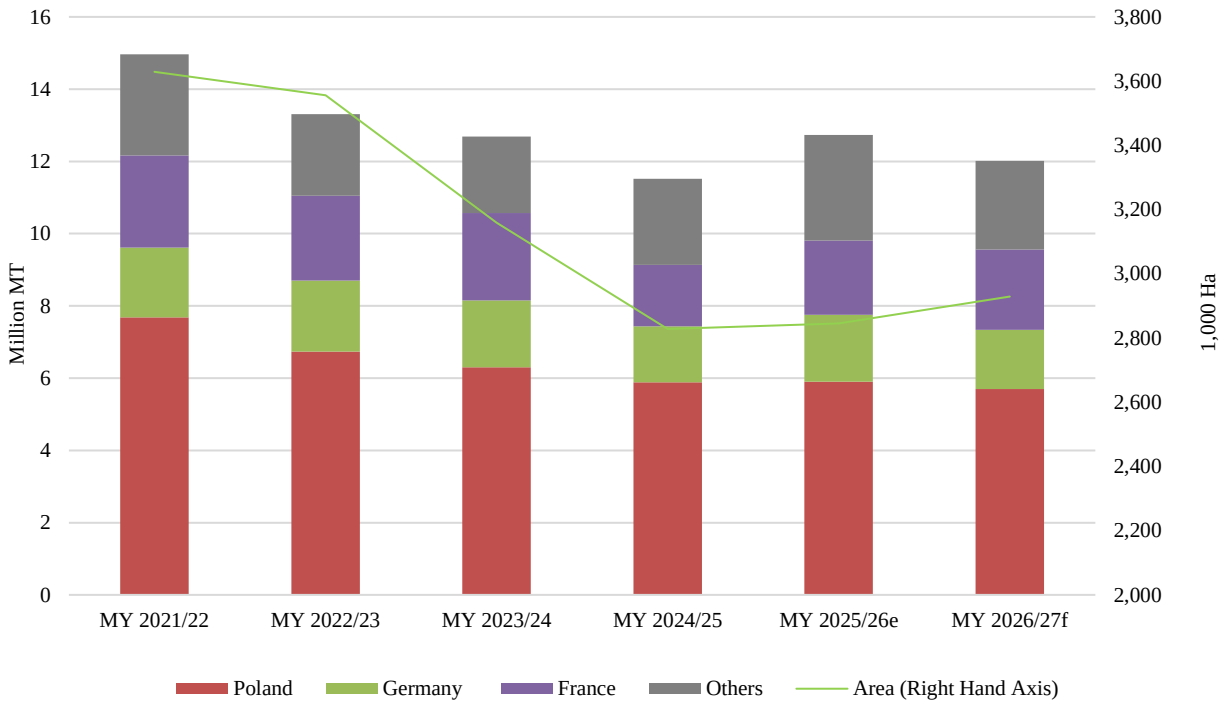
Mixed Grains[6]

Table 7. Production, Supply and Distribution – Mixed Grains

Mixed Grain	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
European Union	USDA Official	New Post	USDA Official	New Post	New Post	USDA Official
Area Harvested (1000 HA)	2,843	2,828	2,862	2,845		2,930
Beginning Stocks (1000 MT)	925	925	625	602		892
Production (1000 MT)	11,550	11,516	12,768	12,731		12,000
Total Supply (1000 MT)	12,475	12,441	13,393	13,333		12,892
Feed and Residual (1000 MT)	10,400	10,200	11,000	10,800		10,500
FSI Consumption (1000 MT)	1,450	1,639	1,550	1,641		1,600
Total Consumption (1000 MT)	11,850	11,839	12,550	12,441		12,100
Ending Stocks (1000 MT)	625	602	843	892		792
Total Distribution (1000 MT)	12,475	12,441	13,393	13,333		12,892
Yield (MT/HA)	4.0626	4.0721	4.4612	4.4749		4.0956
(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 Grains begins in October for all countries. TY 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Figure 27. EU Mixed Grains Area and Production



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

[6] 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.

Forecast for MY 2026/27 mixed grains planting area is higher than last year, amounting to 2.9 million Ha. Farmers in different EU countries are making varying decisions regarding triticale and mixed grains sowing. The forecast anticipates increased area in Poland, the largest producer of mixed grains, as in France, and in smaller producing Member States such as Denmark, Czechia, and Bulgaria.

Mixed grain production in MY 2026/27 is forecast at 12.0 MMT, below the 12.7 MMT estimated for MY 2025/26. Yields are projected to return to average in MY 2026/27, following bumper levels registered in the previous season. In Poland, winter triticale remains in good condition after winter. 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. There is a growing preference to feed triticale to livestock over other mixed grains due to its higher nutritional value. Farmers preference for higher triticale share within mixed grains is growing. Triticale mostly replaces wheat in less fertile soils that are still regarded as too fertile for rye.

In MY 2026/27, feed use of mixed grains is forecast to decrease due to the lower crop predicted. Mixed grains are mostly used for feed, accounting for roughly 90 percent of total consumption. Triticale is used both for on-farm feed production and by the feed industry. In MY 2025/26, on-farm feed use is expected to increase over the previous year, following abundant harvest. FSI use of mixed grain in MY 2025/26 is predicted to be 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. Stocks are used up systematically throughout the year, so end-of-year stocks are usually minimal. However, in last years, stocks of mixed grains increased and in MY 2025/26 reached a record level of almost 900 MT. Given the lower production, it is expected that MY 2026/27 ending stocks will be lower in comparison with the previous year.

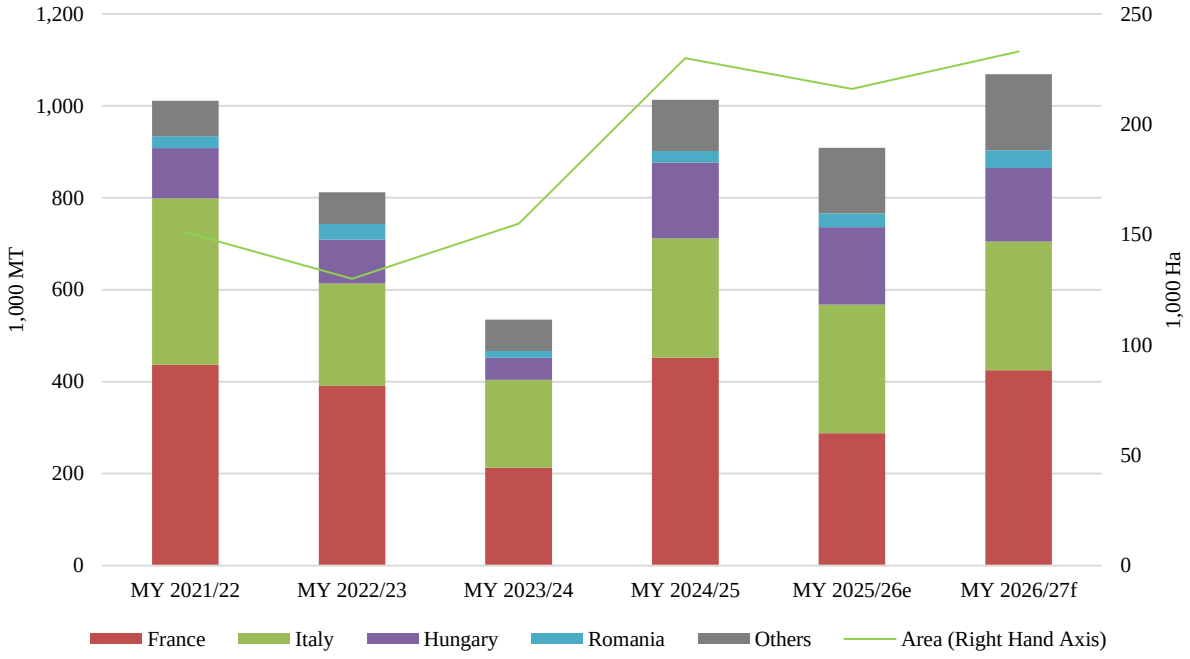
Sorghum

Table 8. Production, Supply and Distribution – Sorghum

Sorghum	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	214	230	198	216		235
Beginning Stocks (1000 MT)	21	21	46	30		41
Production (1000 MT)	965	1,013	853	909		1,070
MY Imports (1000 MT)	115	115	500	460		165
TY Imports (1000 MT)	259	259	500	200		170
Total Supply (1000 MT)	1,101	1,149	1,399	1,399		1,276
MY Exports (1000 MT)	15	15	15	14		10
TY Exports (1000 MT)	15	15	15	14		10
Feed and Residual (1000 MT)	1,025	1,087	1,325	1,325		1,215
FSI Consumption (1000 MT)	15	17	19	19		20
Total Consumption (1000 MT)	1,040	1,104	1,344	1,344		1,235
Ending Stocks (1000 MT)	46	30	40	41		31
Total Distribution (1000 MT)	1,101	1,149	1,399	1,399		1,276
Yield (MT/HA)	4.5093	4.4043	4.3081	4.2083		4.5532
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

Figure 28. EU Sorghum Area and Production



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

EU sorghum area is anticipated to amount to 235 thousand Ha[7] in MY 2026/27, up from the 216 thousand Ha planted to sorghum in MY 2025/26. This area increase is largely driven by increased planting intentions anticipated in France, Bulgaria, Slovakia, and Slovenia offsetting the anticipated area decline projected in Hungary. In France farmers are expected to opt to increase the area planted of this drought-resilient spring-planted crop on drought concerns and crop margin concerns.

Downward corrections in sorghum area occur, like in MY 2025/26, when moisture conditions encourage less water resilient spring crops, namely corn. Similarly, the fact that sorghum has lower input needs (plant protection, products, fertilizers, water) compared to corn, continues to raise interest among farmers. Sorghum cultivation in France, Italy, and Hungary represents over 75 percent of the EU's planted area. To a lesser extent, sorghum is also present in Romania, Slovakia, Slovenia and Bulgaria.

Assuming average conditions, in MY 2026/27 EU sorghum production may amount to just above one MMT.

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

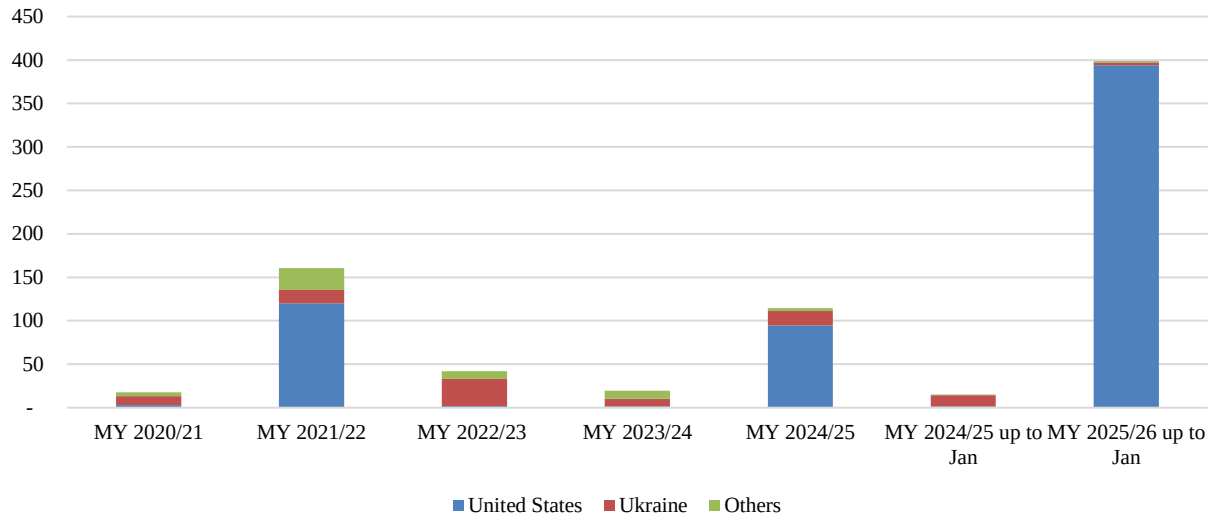
In MY 2025/26 the EU has imported comparatively large quantities of sorghum originated in the United States. The limitations in Ukraine grain availability has made Spain, the EU's largest grain importing Member State, but also Italy turn to the United States for their sorghum purchases. In the EU, sorghum is used for feed purposes and replaces alternative grains when at a favorable price spread. Trade data available from July 2025 through Januyary 2026 indicate that the bloc's sorghum nearly amounted to 400 thousand MT, virtually all originated in the United States[8].

In the past, Spain has been an alternative destination of U.S. sorghum when the crop is priced at a significant discount to corn. Only on a few occasions in recent years low global prices of grain triggered the enforcement of import duties on sorghum imports. Otherwise, sorghum faces zero import duty when accessing the EU. Additionally, Spain, the EU's largest importer of sorghum, has special provision in place, *Abatimento*, which allows the country to import 300 thousand MT of duty-free sorghum annually.

For additional information, consult Policy Section below.

[7] 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.
[8] For additional details please consult U.S. exports sales report.

Figure 29. Main Sorghum Suppliers to the EU (1,000 MT)



Source: Trade Data Monitor, LLC.

Section III. Rice

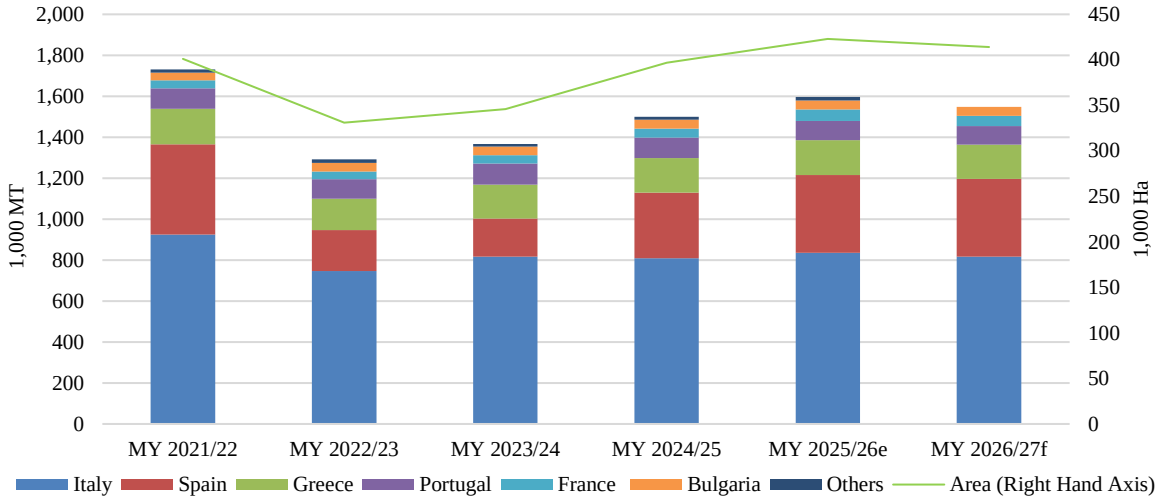
Table 9. Production, Supply and Distribution – Rice[9]

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Sep 2024		Sep 2025		Sep 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	394	397	415	423		410
Beginning Stocks (1000 MT)	700	700	993	973		1,048
Milled Production (1000 MT)	1,595	1,629	1,770	1,730		1,700
Rough Production (1000 MT)	2,653	2,559	2,786	2,715		2,670
Milling Rate (.9999) (1000 MT)	6,012	6,366	6,353	6,372		6,367
MY Imports (1000 MT)	2,534	2,533	2,300	2,360		2,360
TY Imports (1000 MT)	2,390	2,400	2,300	2,360		2,360
Total Supply (1000 MT)	4,829	4,862	5,063	5,063		5,108
MY Exports (1000 MT)	336	339	400	415		435
TY Exports (1000 MT)	350	350	400	415		435
Consumption and Residual (1000 MT)	3,500	3,550	3,600	3,600		3,600
Ending Stocks (1000 MT)	993	973	1,063	1,048		1,073
Total Distribution (1000 MT)	4,829	4,862	5,063	5,063		5,108
Yield (Rough) (MT/HA)	6.7335	6.4458	6.7133	6.4184		6.5122
(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 2026/2027 = January 2027 - December 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU Posts.

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

Figure 30. EU Rice Area and Milled Production



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

In MY 2026/27, EU rice production[10] is forecast to decrease from MY 2025/26, with lower volumes expected in Italy, Greece, Portugal, and France. Production in Spain, Bulgaria, and Romania is expected to level off, while output in Hungary is projected to increase.

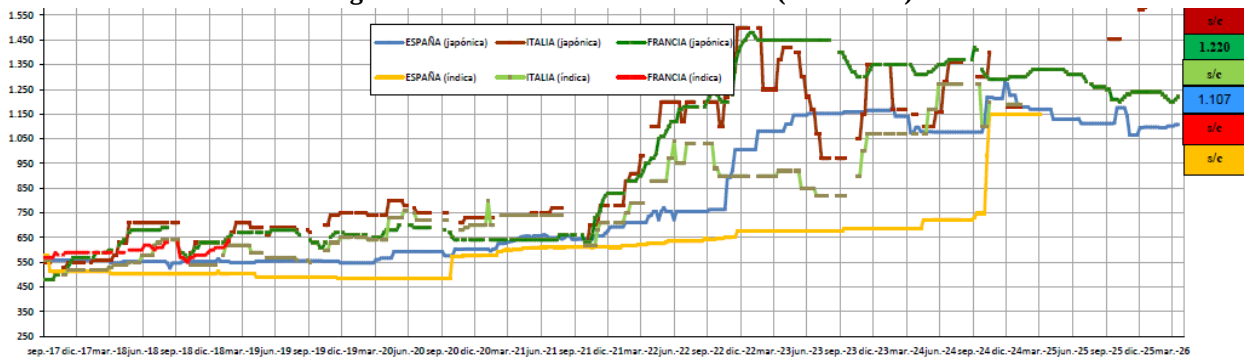
In MY 2026/27, EU rice area is forecast to edge down, mainly due to reductions in Italy (limited price incentives), Portugal, and France. Rice planted area is expected to remain broadly unchanged in Spain, Greece, Bulgaria, Romania, and Hungary. In Spain, adequate rainfall has replenished reservoirs, allowing full planting in both traditional and non-traditional growing regions despite limited price incentives.

EU rice consumption is forecast to remain stable in MY 2026/27, supported by continued activity in the hotel-restaurant-institutional (HRI) sector and sustained 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 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[11]. 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. Additionally, broken rice is used in the EU production of rice flour (a common ingredient in gluten-free baking and cooking), puffed rice, beer fermentation, pet food, and animal feed.

[10] EU rice production is concentrated in seven Member States: Italy, Spain, Greece, Portugal, Bulgaria, France, and Romania.
[11] 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.

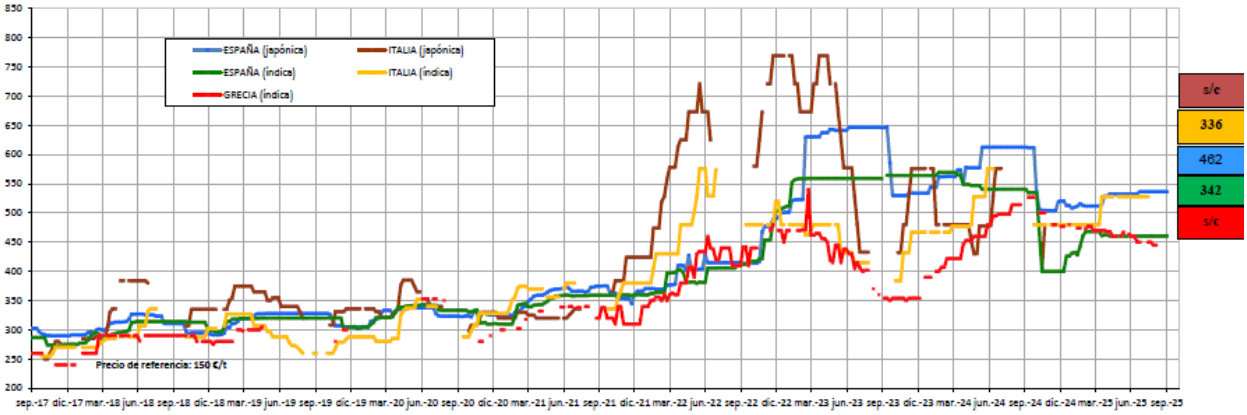
High beginning stocks in MY 2026/27, reflecting weaker returns for rice producers across the EU are expected to keep import demand steady. As EU Indica rice production falls short of the bloc's consumer demand, imports of this rice variety are expected to remain strong. Myanmar, India, Cambodia, Pakistan, and Thailand are the EU's leading rice suppliers. The Netherlands serves as a key gateway for rice imports, while Belgium, with its significant 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 rates 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.

Figure 31. Milled Rice Prices in the EU (Euros/MT)



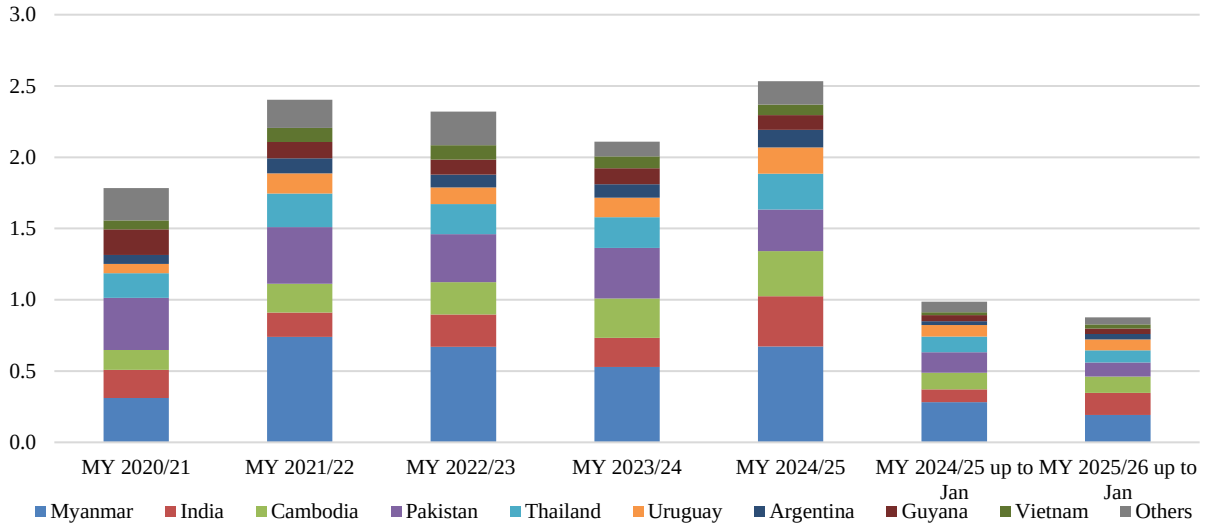
Source: Spanish Ministry of Agriculture, Fisheries and Food based on Directorate-General for Agriculture and Rural Development data.

Figure 32. 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.

Figure 33. Main Rice Suppliers to the EU (Million MT)

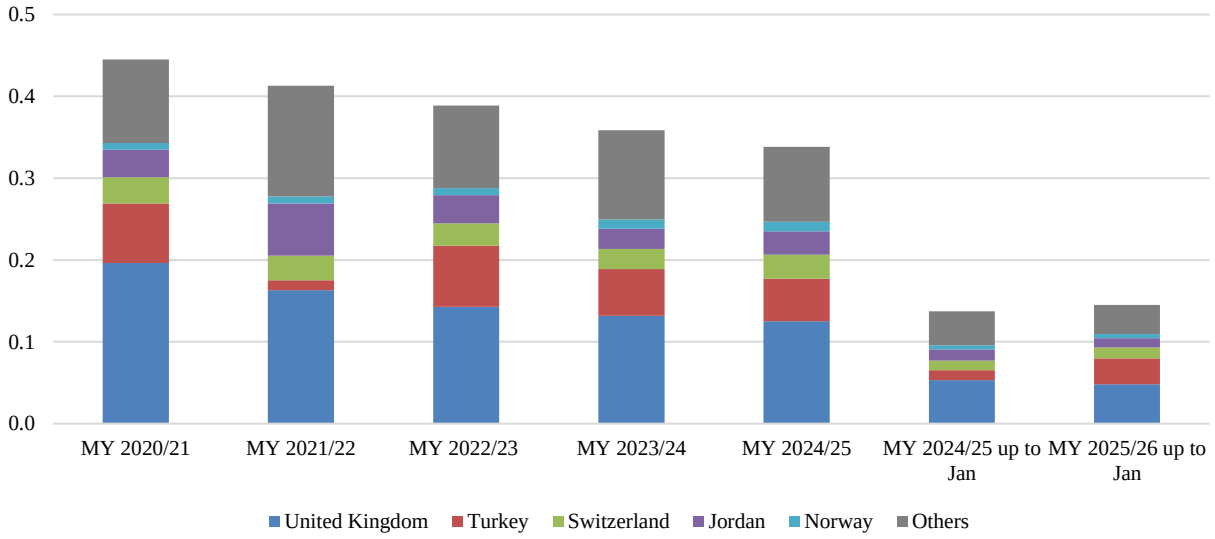


Source: Trade Data Monitor, LLC.

To protect EU producers from growing competition, farmers are calling on the EU to introduce stronger trade safeguards and automatic protection mechanisms. They are also stressing the need for innovation to develop rice varieties that are more resilient to the climate crisis, ensuring the long-term sustainability of European rice production.

EU rice exports are forecast to increase in MY 2026/27 driven by higher domestic availability. Most exports consist of Japonica varieties destined to the United Kingdom and Türkiye, principally sourced from Italy.

Figure 34. Main Export Destinations for EU Rice (Million MT)



Source: Trade Data Monitor, LLC.

Section IV. Policy

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. The simplifications were published in the Official Journal on December 19, 2025, for implementation starting in 2026.

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 for legislative proposals and other actions taken by the EU executive. The Vision focuses on the need for the EU to ensure "a global level playing field" for its farmers and improve their competitiveness, resilience, and sustainability.

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. Within the EU, 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.

EU Omnibus on Food and Feed Safety

On December 16, 2025, the European Commission published a proposal for an omnibus regulation to amend ten key legal acts to simplify EU food and feed legislation. However, the proposed regulation also includes certain provisions based on the EU's "mirror clause" concept that will impose EU environmental, food safety, and animal welfare production standards on imported products and thus creating new trade barriers.

Agricultural Biotechnology[12]

In the EU, GE crop cultivation remains highly limited. The authorization for the cultivation of genetically engineered (GE) crops is governed by Directive 2001/18/EC[17]. The only GE crop approved for cultivation is corn MON 810, which is grown exclusively in Spain and Portugal, accounting for just one percent of the total EU corn area. Since 2015, nineteen EU countries have opted out of GE crop cultivation under Directive (EU) 2015/4121[8].

[12]For more information, please see the EU Biotechnology and Other New Production Technologies Annual Report.

For the import, distribution, or processing of GE crops, Regulation (EC) 1829/2003[19] outlines the authorization process. Imported GE crops are predominantly used as animal feed, which must be labeled as "contains GE products." 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 have declined significantly since 1998 due to slower EU approvals of GE traits, the absence of a low-level presence policy, and complex approval procedures for stacked events, whereby corn varieties combining multiple traits must obtain multiple, sequential approvals. While U.S. shipments have generally remained limited, exports rebounded in MY 2025/26 supported by strong U.S. supplies and tighter availability from competing exporters.

New Genomic Techniques

For plants obtained using genome editing and other new genomic techniques (NGTs), EU institutions have reached a provisional political agreement on a new regulatory framework, pending formal adoption by the European Parliament and the Council. The framework would establish two categories of NGT plants: those considered comparable to conventionally bred varieties, subject to a verification procedure and lighter requirements, and those remaining under rules broadly aligned with existing GMO legislation. Once formally adopted and published in the Official Journal, the regulation would enter into force and foresee a two-year implementation phase before becoming applicable. During this transition period, implementing acts and verification systems would be developed. Until the new regulation becomes applicable, plants obtained through genome editing continue to fall under the existing GMO legislation. Once the new framework goes into effect, NGT products originating from third countries would be subject to the corresponding verification requirements, potentially introducing additional compliance steps for exporters to the EU market.

EU Plant Protection Products Policy

Maximum Residue Limits (MRLs) and import tolerances, under Regulation (EC) No 1107/2009 and Regulation (EC) No 396/2005. 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; this link provides a list of 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 GAIN reports 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 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.

- **Romania:** Since 2018, on a yearly basis, the Romanian Ministry of Agriculture renewed the authorizations for the use of neonicotinoids for corn, as a mean to fight *Tanymecus Dialticollis* insect. For the MY 2026/27 corn crop, for the first time since restrictions on neonics were imposed at the EU level, the Romanian government has not issued a derogation for the use of neonicotinoids. The lack of derogation this year is likely due to the EU Commission letter from October 2025 announcing an infringement procedure against Romania, stating that granting emergency authorizations can be considered a persistent practice by the Romanian authorities and that Romania has not indicated plans to stop granting future authorizations.

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), aiming to prevent products causing deforestation from entering the EU. The proposal targets products identified as main drivers of deforestation.[13] In December 2025, the EU published Regulation 2025/2650 which delayed the EUDR's entry into application until December 30, 2026. The Regulation also calls on the Commission to publish a simplification review of EUDR by April 30, 2026.
For more information about the changes introduced by Regulation 2025/2650, please see GAIN Report: EU Adopts Changes to Deforestation Regulation.

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 are published as an amendment to Commission Regulation (EU) 2023/915 on maximum levels for certain contaminants in food.

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

Table 10. Products covered by the new maximum levels of nickel[14]

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

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: 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.

[14] 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.

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	2,285,665 I) 1,142,832 II) 1,142,832	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": Following the EU accession, Spain and Portugal apply common EU tariffs which reduced the competitiveness of imports from non-EU countries. As compensation for the loss of those two markets, 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. 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 shifted this scheme as of April 1, 2021, to an automatic zero duty tariff rate quota (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 - or, 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 meant to act as "market of last resort" when prices fall below specific intervention prices 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 EU food aid programs. Each year the Commission must publish details of the conditions under which products bought 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[15]

Since February 2022 the Russian war in Ukraine, continues to put pressure on global food security as both countries engaged 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.

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

[15] 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.

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. For more information, please see GAIN Report European Union Revises Import Quotas for Agricultural Products from Ukraine.

Table 14. TRQs for Ukraine as of October 29, 2025

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

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 2026, likely to be prolonged beyond that date.

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 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 July 9, 2025, Regulation (EU) 2025/1344 increased 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.

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

Certificates used in U.S-EU grain and products trade: The European Commission is digitizing agri-food trade documents issued by third countries required for the management of tariff rate quotas provided for in Implementing Regulations (EU) 2020/761 and Regulation (EU) 2020/1988. Trade documents currently handled in paper format will need to be produced directly in ELAN or transmitted to ELAN via national electronic systems. The deadline for this process is January 17, 2028. Regulation (EU) 2025/1272, however, explicitly provides an exception for the export certificate for tariff quota with order number 09.4127 (wholly milled or semi-milled rice) and the certificate of conformity required for tariff quota with order number 09.0076 (malting barley).

EU Retaliatory Tariffs Against U.S. Grains

On February 5, 2026, the European Union published Regulation (EU) 2026/295 in its Official Journal to again extend suspension of the EU's retaliatory tariffs for an additional six months to August 6, 2026. The Regulation notes that the European Union remains committed to making progress to ensure the full implementation of the August 2025 Joint Statement between President Trump and Commission President Von der Leyen. For additional information, consult: European Union: EU Extends Suspension of Retaliatory Tariffs to August 2026

On August 5, 2025, the European Union published Implementing Regulation (EU) 2025/1727 suspending retaliatory tariffs on certain U.S. products imposed by Implementing Regulation (EU) 2025/1564. This suspension was in place until February 6, 2026.

On July 24, 2025, the European Union (EU) published Implementing Regulation (EU) 2025/1564 introducing retaliatory tariffs against U.S. goods valued at USD $109 billion. The EU Regulation was set to enter into force on August 7, 2025. The full list of products subject to the retaliatory tariffs can be found in GAIN Report European Commission Publishes Updated Retaliatory Tariff Regulation to Enter into Force on August 7 2025.

U.S.-EU WTO Cases on Aircraft Subsidies**:** On November 10, 2020, the EU implemented 25 percent retaliatory tariffs (Implementing Regulation (EU) 2020/1646) on $4 billion in U.S. exports, including non-durum wheat, following the WTO ruling on U.S. subsidies to aircraft maker Boeing. . Following June 2021 truce, the European Commission adopted Implementing Regulation (EU) 2021/1123 suspending the application of tariffs until July 11, 2026.

EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several FTAs with other countries and regions, which include concessions on grains. 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 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 January 17, 2026, the EU and the four Mercosur countries - Argentina, Brazil, Paraguay, and Uruguay - formally signed the EU-Mercosur Partnership Agreement (EMPA) and a parallel Interim Trade Agreement (iTA). This followed the political finalization reached on December 6, 2024. To address long-standing concerns regarding market disruption, the European Parliament approved a reinforced bilateral safeguard regulation on February 10, 2026. This mechanism allows the EU to temporarily suspend tariff preferences or reinstate duties if a surge in agricultural imports causes or threatens serious injury to EU producers. A 5 percent increase in imports of sensitive products over a three-year average can now trigger a formal investigation.

On March 23, 2026, the EU informed Mercosur countries about the provisional application of the iTA. The iTA will be applied provisionally from 1 May 2026, and tariffs will be removed on certain products as of day one. Under the agreement, duties will be phased out on 91 percent of EU exports to Mercosur and 92 percent of Mercosur exports to the EU.

. For grains, this includes the elimination of tariffs for EU exports of malt to Mercosur. Mercosur countries are allocated new Tariff Rate Quotas (TRQs) with a five-year phase-in period:

- 1 million MT of maize and sorghum
- 60,000 MT of rice

Mexico: On January 17, 2025, the EU and Mexico announced the conclusion of a new Modernized Global Agreement. In September 2025, the European Commission adopted proposals for an Interim Trade Agreement (iTA) to fast-track the trade pillar while the broader agreement undergoes full member-state ratification. As of February 2026, the agreement is moving toward a formal signature expected before the summer, with implementation benefits targeted for later this year or early 2027. 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.

India: On January 27, 2026, the EU and India concluded negotiations for a historic Free Trade Agreement. However, unlike the Mercosur and Mexico agreements, major grain categories—including rice and wheat—have been excluded from tariff liberalization to protect sensitive agricultural markets in both regions. The agreement instead focuses on reducing duties for processed agricultural products and olive oil, while maintaining strict safeguards on staple crops.

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 15. 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.

On December 1, 2025, the EU institutions found an agreement on the revision of the Generalized Scheme of Preferences (GSP) Regulation that grants EU trade preferences to developing countries. As part of this agreement, the EU will be introducing an automatic safeguard mechanism for rice imports using a tariff rate quota system. Under this mechanism, in the event of a significant surge of rice imports above historical average imports to the EU, these imports will be subject to MFN tariffs for a specific period to prevent serious disturbances to the EU rice market. This agreement still needs to be formally adopted by the Parliament and Council and could start applying as of 2027. Media has reported that some Member States, including Italy and Spain, and Parliamentarians might push back against the agreement due to sensitives about rice. A final decision should be taken before the summer of 2026.

A summary of the EU's preferential rice import regimes can be found in Table 16.

Table 16. 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[16]
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*[17] 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.*

[16] Certificate of Authenticity required.
[17] 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)
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
EU Grain and Feed Quarterly Report 2025	12/04/2025
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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Attachments:

No Attachments