

**Required Report:** Required - Public Distribution

**Date:** December 04, 2024

**Report Number:** E42024-0005

## **Report Name:** Grain and Feed Quarterly

**Country:** European Union

**Post:** Madrid

**Report Category:** Grain and Feed

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### **Report Highlights:**

The long-lasting heat and persistent summer dryness that trimmed corn yields most prominently in Bulgaria, Romania and Hungary also added downward pressure on the total European Union (EU) grain supply. This is an additional reduction to the already sharply lower wheat yields in the western EU (France and Germany) due to excessive rainfall since the fall of 2023. The shorter domestic supply and quality issues are anticipated to take a toll on the bloc's grains exports. Conversely, the ample domestic supplies in Spain and the Nordics, in combination with a dim economic outlook for livestock producers reducing cattle and pig feed demand across the EU, are expected to result in lower grain import needs.

**Disclaimer:** This report presents an updated outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2024/25. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the EU and is not official USDA data.

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## Executive Summary

**Table 1. Production, Supply and Distribution - Total Grains**

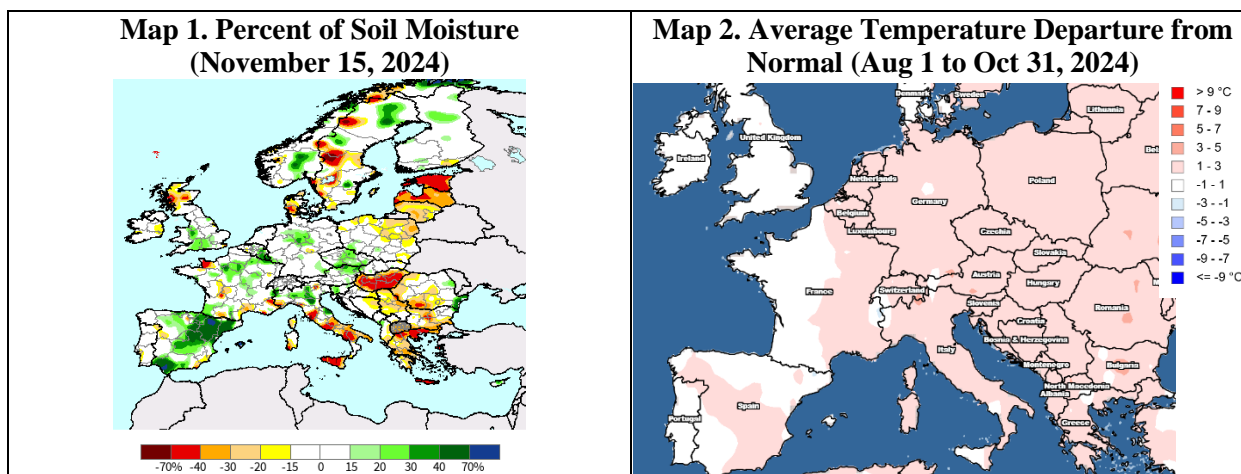
Total Grains <sup>1</sup>	2022/2023		2023/2024		2024/2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	50,936	50,964	50,355	50,396	49,150	49,048
Beginning Stocks (1000 MT)	32,436	32,436	32,211	32,298	29,392	31,509
Production (1000 MT)	267,349	267,487	271,364	271,890	260,160	258,120
MY Imports (1000 MT)	37,678	37,679	34,364	34,706	32,035	30,455
TY Imports (1000 MT)	37,832	37,840	34,067	34,550	32,040	30,395
TY Imp. from U.S. (1000 MT)	556	444	1,333	1,010	-	-
Total Supply (1000 MT)	337,463	337,602	337,939	338,894	321,587	320,084
MY Exports (1000 MT)	46,180	46,187	49,397	49,453	39,980	37,366
TY Exports (1000 MT)	46,131	46,143	49,181	49,269	39,975	37,372
Feed and Residual (1000 MT)	156,880	158,399	155,990	157,048	154,990	154,740
FSI Consumption (1000 MT)	102,192	100,718	103,160	100,884	103,015	101,345
Total Consumption (1000 MT)	259,072	259,117	259,150	257,932	258,005	256,085
Ending Stocks (1000 MT)	32,211	32,298	29,392	31,509	23,602	26,633
Total Distribution (1000 MT)	337,463	337,602	337,939	338,894	321,587	320,084

<sup>1</sup>“Total grains” is the sum of wheat, barley, corn, rye, sorghum, oats, and mixed grains.

Source: FAS EU Posts.

## MY 2023/24 EU Grain Production

Total European Union (EU) grain production for MY 2024/25 is estimated at 258.1 MMT, down from the summer estimate, when Post pegged production at 267.4 MMT, and down from the 271.9 MMT recorded in MY 2023/24. The EU experienced extreme weather conditions ranging from excessive rains in France and parts of Germany that pushed winter grains yields down, to abnormally hot and dry summer conditions in the EU's eastern grain production areas, such as Bulgaria and Romania, where most of the corn area is rainfed. This situation has pushed corn yields well below the historical average. Conversely, improved total grain output compared to the drought-stricken MY 2023/24 is anticipated for Spain and the Nordic countries.



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

## MY 2024/25 EU Grain Consumption Trends

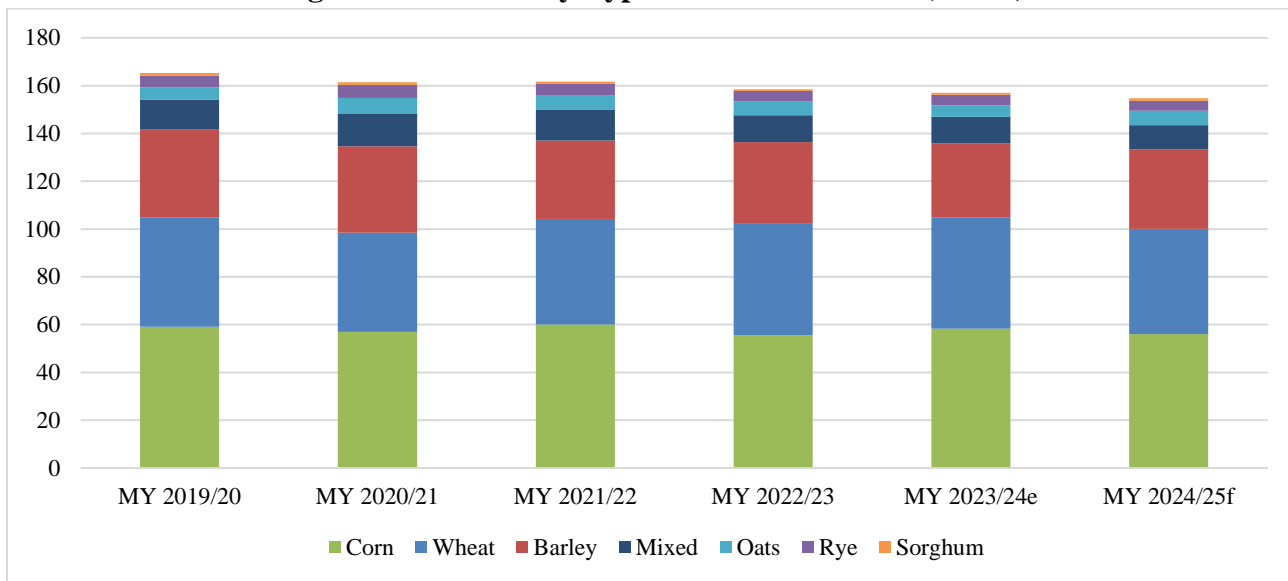
Post has revised down the EU's total grain consumption for MY 2024/25 to 154.7 MMT. Feed demand is anticipated to decline in MY 2024/25, despite the steady internal demand from EU chicken meat production to supply the increasing preference for poultry meat by inflation-hit price-sensitive EU consumers, and the surge in tourism-driven Hotel, Restaurant, and Institutional (HRI) activity. Farmers in most EU Member States are continuing to lower their feed purchases to reduce their operating costs, in addition to decapitalizing their cattle and pork herd in the context of an inflation-driven sluggish consumption of meat and dairy products. The animal-disease<sup>2</sup> affected beef cattle and swine herds<sup>3</sup> in large parts of the EU's territory and declining dairy cow numbers are driving consumption down in MY 2024/25. Other factors that are eroding producers' margins and hence pushing EU feed grain demand down include rising input costs (energy, labor, interest rates), except for feed, and mounting environmental and animal welfare regulations. Similarly, the difficulty in generational renewal poses a challenge in the continuation of farming activity.

<sup>2</sup> Ranging from African Swine Fever (ASF) and Porcine Reproductive and Respiratory Syndrome (PRRS) in the case of the swine herd and Blue Tongue (BT) and Epizootic Hemorrhagic Disease (EHD) in cattle.

<sup>3</sup> Additional information regarding animal sector trends can be consulted in the most recent [EU Livestock](#), [Poultry](#) and [Dairy](#) Annual GAIN reports.

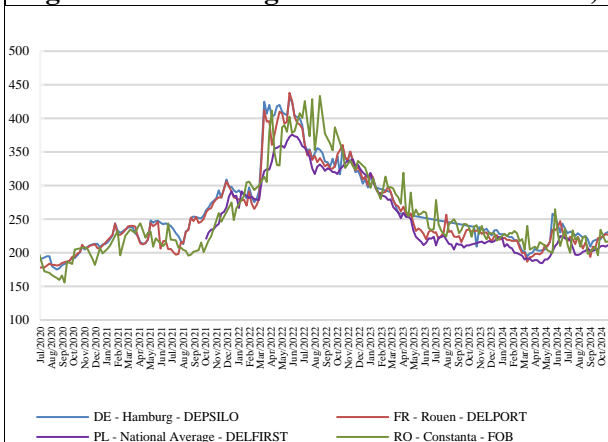
The MY 2024/25 wheat share in feed rations is projected to decline compared to the previous season, given the limited EU crop resulting from excessive moisture in the large wheat producing countries such as France and Germany, which offsets the sizeable wheat output in EU Black Sea Region Member States such as Romania or Bulgaria. Similarly, improved yields are projected for minor grains in the Nordic EU Member States and a significant improvement of barley output in Spain are forecast to result in a higher share of these grains in the feed formula. In the case of corn, the steady pace of corn imports from Ukraine and the United States are expected to allow the corn share in the feed formula to decline only marginally year-on-year, despite the shorter EU crop.

**Figure 1. Feed Use by Type of Grain in the EU (MMT)**

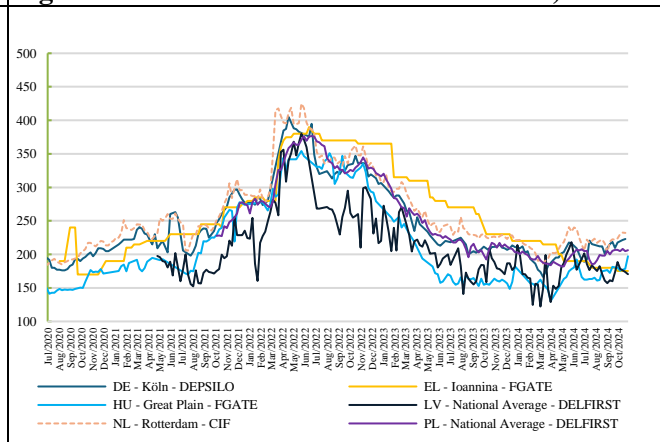


Source: FAS EU Posts estimates.

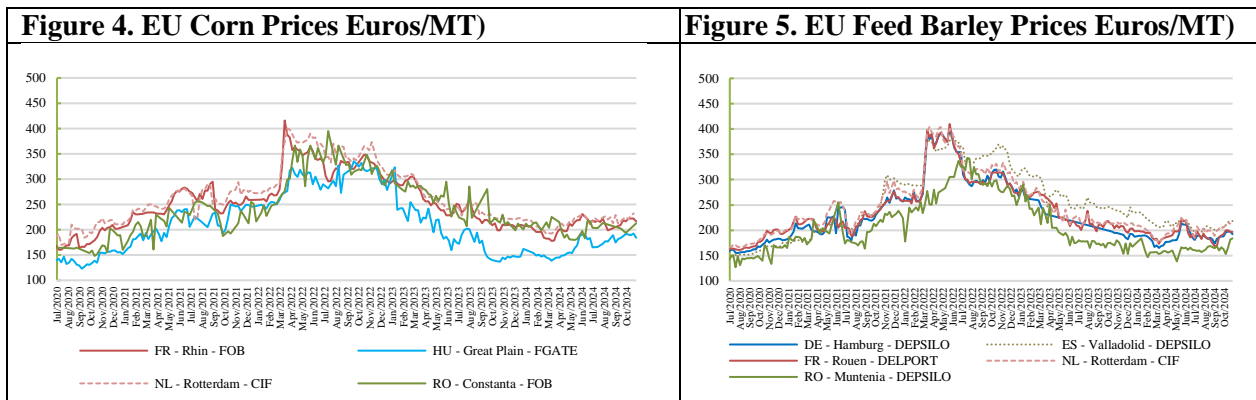
**Figure 2. EU Milling Wheat Prices Euros/MT)**



**Figure 3. EU Feed Wheat Prices Euros/MT)**



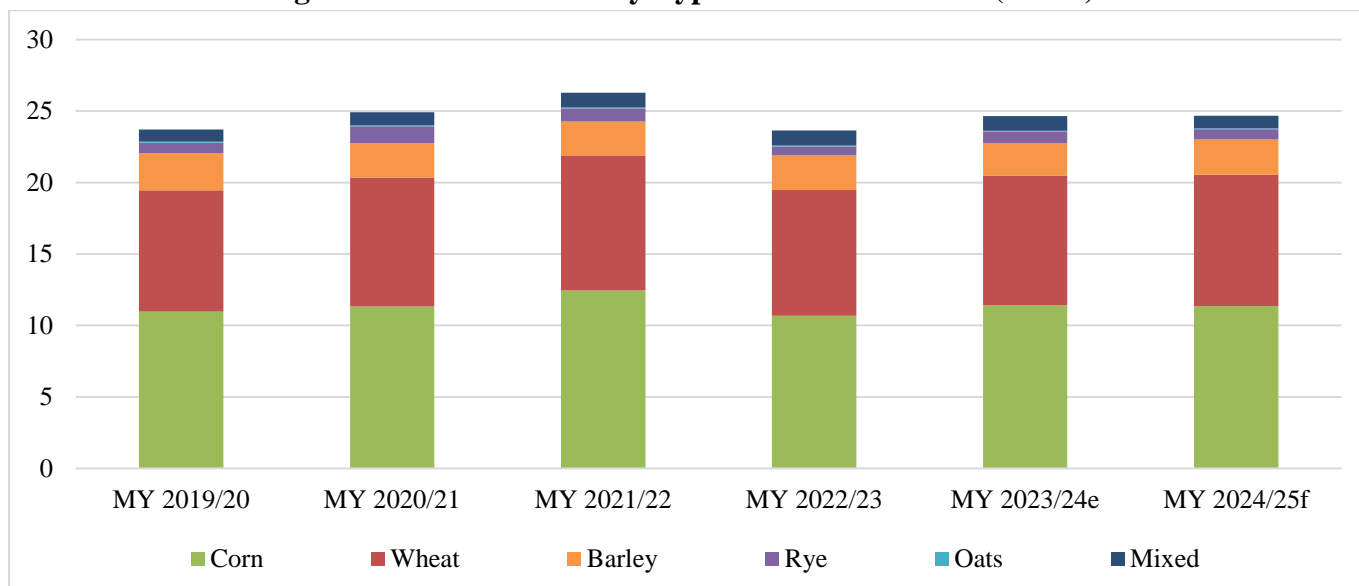
Source: EU Commission based on Member States notification according to [Regulation \(EU\) 2017/1185](https://eur-lex.europa.eu/eli/reg/2017/1185).



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

Food, Seed, and Industrial (FSI) uses in MY 2024/25 have been revised up from MY 2023/24 as demand for grain-based industrial products such as starch, maltodextrin, glucose, ethanol,<sup>4</sup> DDGS and gluten continues to grow, driven mainly by an expanded projected use in Belgium, Poland, Lithuania, and Romania.

**Figure 6. Industrial Uses by Type of Grain in the EU (MMT)**



Source: FAS EU Posts estimates.

The smaller corn crop in MY 2024/25, particularly in Romania and Bulgaria, together with the vastly reduced wheat crop and a somewhat poorer quality of the French and German wheat crop, is pushing overall EU grain exports down. The stagnant demand in the Netherlands, Italy, and Portugal, together with the largely improved Spanish domestic grain crop, are the factors that keep MY 2024/25 EU grain imports at a lower level.

<sup>4</sup>Additional information regarding the EU’s Bioethanol Sector is available in the latest [EU Biofuels Report](#) and in the latest [Biofuel Mandates in the EU by Member State](#).

## MY 2025/26 EU Winter Grain Plantings

Early estimates indicate that EU farmers may see their MY 2025/26 winter grain plantings reduced, as abundant precipitation in September and October in western Europe, notably in France, delayed spring grain crop harvests such as corn, pushing next crop sowing too late for optimal growth before winter.

In Germany, winter grain plantings are expected roughly at the same level as in the previous year, with winter wheat area rebounding at the expense of the area planted with barley. Planting conditions were generally good. Problems only occurred in localized areas, as it was too dry in some Eastern parts of the country and too wet in some western parts. Early crop development seems to be good.

In Bulgaria and Romania, the long-awaited precipitations arrived in early September, providing much needed soil moisture by the first half of October for beginning the winter crop planting operations. While some delays in wheat and barley plantings have been reported in this region, it is expected that farmers will catch up and plant the usual amount of land under wheat and barley. Nevertheless, area planted to barley in this region continues to face stiff competition from more profitable rapeseed.

In Spain, early fall precipitations caused delays in summer crops (corn and sunflower) harvest. In some grain growing areas in the country's east, excessive soil moisture preempted farmers from entering their fields, hence delaying winter-grains planting operations. However, fall precipitations have been favorable for initial development stages of grain crops.

## Section I. Wheat

**Table 2. Production, Supply and Distribution - Wheat**

Wheat Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b> (1000 HA)	24,401	24,420	24,320	24,325	22,900	22,820
<b>Beginning Stocks</b> (1000 MT)	13,631	13,631	16,037	15,700	14,742	16,400
<b>Production</b> (1000 MT)	134,292	134,450	134,944	135,050	122,600	121,960
<b>MY Imports</b> (1000 MT)	12,193	12,190	12,631	12,632	11,500	9,300
<b>TY Imports</b> (1000 MT)	12,193	12,190	12,631	12,632	11,500	9,300
<b>TY Imp. from U.S.</b> (1000 MT)	381	257	-	-	-	-
<b>Total Supply</b> (1000 MT)	160,116	160,271	163,612	163,382	148,842	147,660
<b>MY Exports</b> (1000 MT)	35,079	35,084	37,870	37,934	30,000	28,520
<b>TY Exports</b> (1000 MT)	35,079	35,084	37,870	37,934	30,000	28,520
<b>Feed and Residual</b> (1000 MT)	45,000	46,917	46,500	46,638	44,500	44,030
<b>FSI Consumption</b> (1000 MT)	64,000	62,570	64,500	62,410	64,250	62,710
<b>Total Consumption</b> (1000 MT)	109,000	109,487	111,000	109,048	108,750	106,740
<b>Ending Stocks</b> (1000 MT)	16,037	15,700	14,742	16,400	10,092	12,400
<b>Total Distribution</b> (1000 MT)	160,116	160,271	163,612	163,382	148,842	147,660
<b>Yield</b> (MT/HA)	5.5035	5.5057	5.5487	5.5519	5.3537	5.3444

(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 2024/2025 = July 2024 - June 2025  
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

The EU wheat crop for MY 2024/25 has been revised down, and is now projected to be just below 122 MMT, almost a ten percent decline compared to the 135 MMT crop of MY 2023/24. After a very wet winter and spring 2024 in western EU hampered the wheat crop starting from the sowing period, a further excess of rains throughout the harvest season led to a final wheat production to fall well below Post's summer forecasts in the major wheat producing Member States such as France, Belgium, Germany as well as Czech Republic. Not only is the French wheat crop the lowest for more than three decades, but the quality is also poor. Widespread fungal diseases caused low specific weight and a disappointing protein content was obtained as farmers had difficulties accessing their waterlogged fields to apply fertilizers and pesticides.

The MY 2024/25 German wheat crop also dropped sharply to a thirty-year low. Excessive rains hampered winter wheat sowings operations in the fall of 2023. Additionally, in waterlogged fields, root development was hampered. This reduced the plants' ability to absorb nutrients throughout the growing season and is a major reason for the lower yields. Furthermore, some nutrients were dislocated to lower soil levels and thus more difficult to reach by the roots. Quality-wise, German farmers faced the same issues as their French colleagues.

While Polish wheat producers expected better than average yields in MY 2024/25, heavy late rains caused significant lodging, which negatively impacted the wheat harvest. Widespread flooding in September 2024 in Southern Poland also destroyed wheat crops.

Italian soft wheat and durum production also declined in MY 2024/25, due to lower areas as those crops become increasingly unprofitable, particularly in Southern Italy, due to rising input costs and changing weather patterns. The Hungarian wheat crop in MY 2024/25 has slightly declined due to lower planted areas, to the benefit of larger corn plantings, while yields remained average as no adverse weather impacted them.

While the MY 2024/25 Romanian wheat crop was impacted by a drought, larger areas sowed to wheat compensated the lower yields leading to a marginally lower wheat crop. Conversely, the drought also increased the quality, particularly in terms of protein content of the Romanian wheat. After a disastrous MY 2023/24 crop due to drought, in MY 2024/25 the Spanish wheat crop has bounced back to average. The Bulgarian wheat crop also slightly increased in MY 2024/25 as the harvest benefited from dry conditions that boosted wheat quality, with higher protein content and milling wheat representing above seventy percent of the crop.

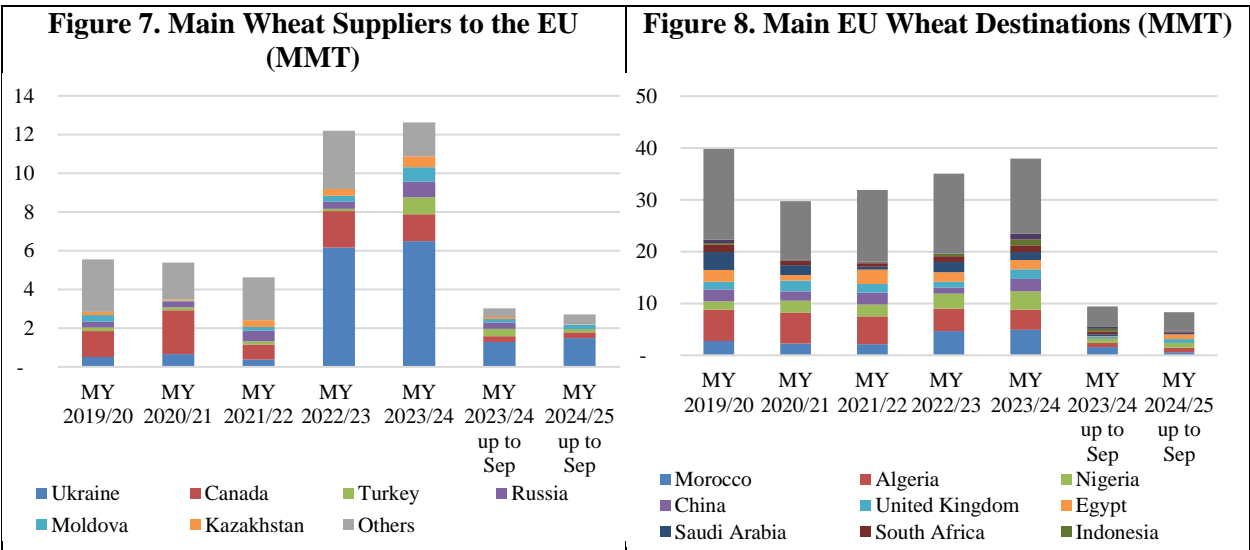
EU wheat feed uses are expected to sharply decrease in MY 2024/25 given the lower supply in main EU producing countries and the increased competitiveness of corn in the feed formula, along with an overall reduction in feed grains demand. Conversely, FSI wheat uses are expected to slightly increase in MY 2024/25 with an increase both in the milling sector and the starch sector, which were negatively impacted in MY 2023/24 by high energy prices that reduced the industries' margins. There are some signs that consumption is slightly rebounding thanks to a moderation in energy prices. Similarly, biofuel uses of wheat are expected to grow marginally.



The larger Spanish grain crop should result in a lower EU wheat imports demand in MY 2024/25. On the other hand, due to the lower EU crop, the Netherlands is foreseen to import more wheat from non-EU countries. Ukraine is anticipated to remain a major supplier of wheat to the EU, with additional Ukrainian wheat transiting through Moldova and labelled as such, despite the suspension of the United Nation’s Black Sea Grain Initiative agreement, which was replaced by shipping alongside Romanian and Bulgarian coasts and imports from Ukraine by road or train to neighboring countries. Wheat imports from Ukraine are not included in the [EU Regulation \(EU\) 2024/1392](#) safeguard mechanism and hence not subject to limitations in imports. However, the Ukrainian government agreed with Ukrainian exporters to self-limit wheat exports. For additional information, see the [Policy section](#) below. Canada is also a major supplier of wheat (mostly durum wheat) to the EU.

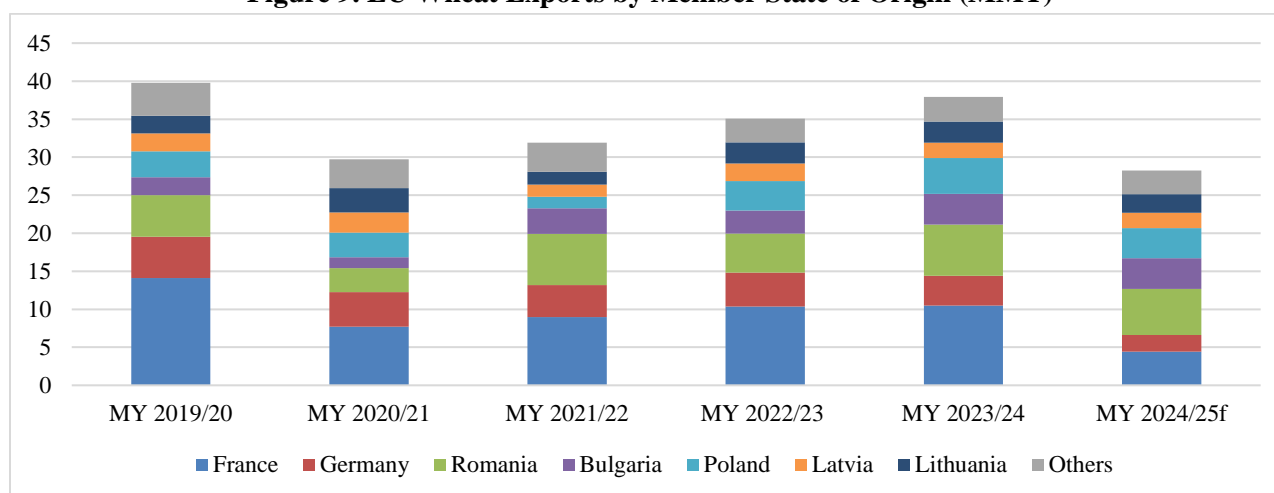
EU wheat exports in MY 2024/25 are anticipated to sharply shrink, due to lower available exportable volume from France, Germany, Poland, and Romania while exports from Bulgaria are foreseen to slightly increase. Romania is now foreseen to become the largest EU exporter of wheat to non-EU countries, surpassing France. In Algeria, previously a major market for EU (mostly French) wheat, quality issues for French wheat, notably low specific weight well outside the public purchase requirements, could exclude French wheat for public tenders. Furthermore, the political tension between France and Algeria that followed France’s recognition of the sovereignty of Morocco on Western Sahara could further hamper French wheat exports to Algeria, notably through the suspension of bank relations. Bulgaria and Romania, in addition to Russia, are likely to replace France on the Algerian market. On the other hand, French wheat exports to Morocco could benefit in MY 2024/25 from the above-mentioned recognition as well as from the recent State visit of the French president to the kingdom.

With a significantly smaller supply and despite lower uses, wheat ending stocks in MY 2024/25 are expected to significantly decrease compared to Post’s previous estimate and reach much lower levels than in MY 2023/24.



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

**Figure 9. EU Wheat Exports by Member State of Origin (MMT)**



Source: FAS Madrid based on Trade Data Monitor, LLC data, and FAS EU Post estimates.

## Section II. Coarse Grains<sup>5</sup>

### Corn

**Table 3. Production, Supply and Distribution - Corn**

Corn	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
Market Year Begins						
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8,799	8,839	8,224	8,320	8,620	8,600
Beginning Stocks (1000 MT)	11,508	11,508	8,029	8,092	7,481	7,261
Production (1000 MT)	52,329	52,380	61,452	61,900	58,800	58,000
MY Imports (1000 MT)	23,188	23,188	19,500	19,791	19,000	19,500
TY Imports (1000 MT)	23,188	23,188	19,500	19,791	19,000	19,500
TY Imp. from U.S. (1000 MT)	174	185	1,333	1,009	-	-
Total Supply (1000 MT)	87,025	87,076	88,981	89,783	85,281	84,761
MY Exports (1000 MT)	4,196	4,198	4,400	4,392	3,300	2,400
TY Exports (1000 MT)	4,196	4,198	4,400	4,392	3,300	2,400
Feed and Residual (1000 MT)	55,600	55,600	57,300	58,300	55,300	56,100
FSI Consumption (1000 MT)	19,200	19,186	19,800	19,830	19,800	19,705
Total Consumption (1000 MT)	74,800	74,786	77,100	78,130	75,100	75,805
Ending Stocks (1000 MT)	8,029	8,092	7,481	7,261	6,881	6,556
Total Distribution (1000 MT)	87,025	87,076	88,981	89,783	85,281	84,761
Yield (MT/HA)	5.9120	5.9260	7.3671	7.4399	6.8213	6.7442

(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 2024/2025 = October 2024 - September 2025  
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

<sup>5</sup>Coarse grains are the threshed, dry seeds of plant, cultivated for human and/or animal consumption and gathered in the dried, unprocessed state upon maturity. Coarse grains include corn, barley, rye, oats, mixed grains, and sorghum.

The EU corn production estimate is reduced to 58 MMT, due to long-lasting heat and persistent soil dryness, which trimmed the yields in south-eastern countries. If confirmed, the harvest would be the second lowest in the past 15 years. The corn growing conditions over the summer resulted in two different realities for the EU crop. The fields in the western EU received plentiful rainfall, even above the saturation point in some regions, while the south-eastern EU witnessed drought and scorching heat over the summer during the critical phases of development. The boosts in production in the western EU could not outweigh the crop damage elsewhere. Downward production adjustments compared to the summer estimates were reported by most of the Member States, including Romania, Hungary, Bulgaria, Italy, Czechia, Croatia, and Slovakia. In Hungary, the corn area was larger than previously expected for MY 2024/25. However, prolonged periods of extreme heat and the lack of precipitation affected corn production in the main growing areas. As a result, yield forecast for corn has been lowered, so that Hungary faces the third lowest level of corn production in 15 years. Romania and Bulgaria witnessed similar growing conditions. In Romania, the extremely high temperatures over an extended period and lack of rainfall impacted the pollination process, curtailing yields significantly. In Bulgaria, the devastating summer weather has led to a drastic reduction in production estimates for corn, making MY 2024/25 the third consecutive year with corn yields far below average. Conversely, in Poland, corn benefited from optimal growing conditions, with July rainfall throughout the country contributing to the improvement of soil moisture. In Italy, the difficult growing season, with a significant delay in sowing, and a record summer drought followed by heavy rains negatively affected both the quantity and quality of production. Similar developments took place in Germany and Belgium.

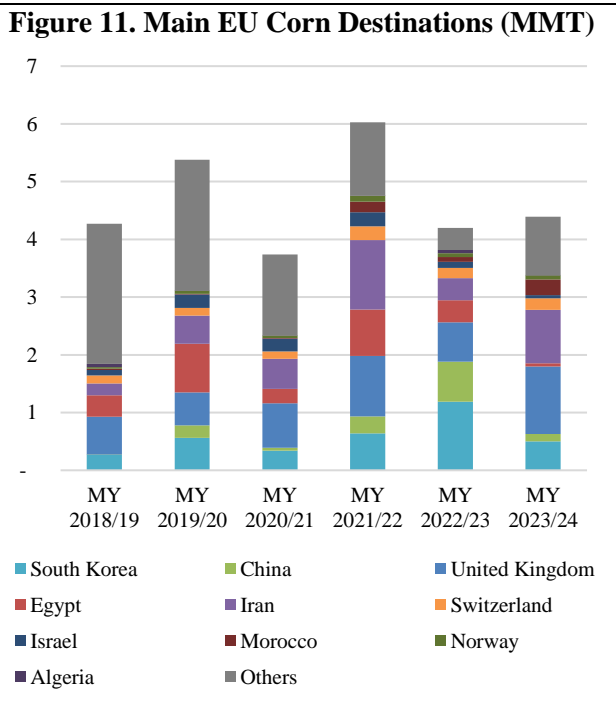
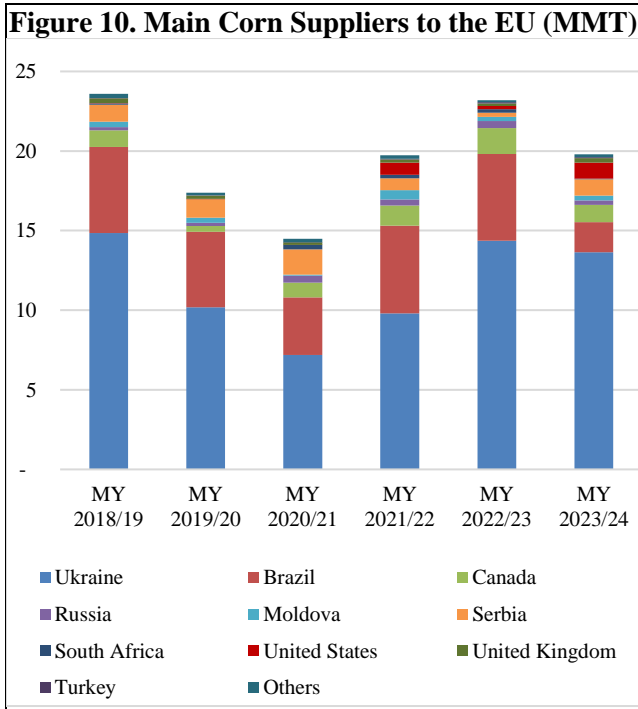
Because of the advanced plant growth process and crop performance, harvesting across EU started much earlier than during an average year, except for France. Here, harvest has been two to four weeks behind schedule due to excess water, which negatively impacted corn yield. Because of the high moisture content, production costs are likely to increase, since drying upon harvesting might be necessary to reduce fungal diseases and mycotoxin. Aflatoxin contamination above the acceptable levels has been reported in several producing Member States, which may have a negative effect on exports and food use. MY 2023/24 area and figures were adjusted up based on latest information reported by Poland, France, and Belgium.

Total EU corn consumption is forecast to decline in MY 2024/25 compared to the previous season. Feed is the main factor responsible for this decrease, with food and industrial uses also showing small dips. The lower domestic supply, the substitution with other feed grains, and disease-related livestock sector concerns are the main elements driving the reduced corn incorporation into feed rations. Except for France, which is forecast to grow, year-on-year feed use is anticipated to fall across EU Member States, most prominently in Spain, where domestic barley supplies are ample, Italy, the Netherlands, Germany, Slovenia, Austria and Romania. In the Netherlands and the Nordics, feed use is at an elevated level supported by a limited domestic wheat availability. Other Member States, such as Poland, Hungary, Croatia, and the Baltics, expect a stagnant feed utilization. In MY 2024/25, corn is expected to lose attractiveness for industrial use in Hungary, Italy, Austria, and Bulgaria, amid reduced profitability, but gain interest in Belgium and Romania. Food use is marginally revised down as negative adjustments from Romania and Bulgaria were not offset by the growth reported in France. MY 2023/24 total consumption was revised up particularly due to strong feed demand.

Imports in MY 2024/25 are projected slightly below the previous season, reflecting a lower supply availability in the major corn suppliers to the EU. Spain, Italy, the Netherlands, Portugal, and Ireland remain the notable EU corn importers. Despite its lower MY 2024/25 crop and the soon to be triggered EU emergency brake for imports, Ukraine is anticipated to remain the leading supplier. Brazil is forecast to recover its exports to the EU market from the previous season, when the lower crop combined with increased domestic consumption for biofuels reduced the exportable supplies. With its abundant supply and price competitiveness, the United States is anticipated to gain a larger market share on the EU market, partially replacing Brazilian corn. Several EU Member States accelerated their corn purchases from the United States in the first weeks of the current season. Similarly, Canada may take advantage of the European deficit and boost deliveries. Tight exportable supplies will result in lower volumes arriving from Serbia and Moldova. Per the latest customs data, MY 2023/24 imports reached 19.8 MMT, with nearly 70 percent of the amount originating from Ukraine.

MY 2024/25 EU corn exports are anticipated to fall by 45 percent as compared to the previous season. This reduction can be almost entirely attributed to Romania, the main EU corn exporter. Additionally, Bulgaria, France, and Croatia foresee weaker exports, which could not be compensated by the positive prospects from Poland. United Kingdom is expected to remain the key export market, followed by Iran and Switzerland. As per the latest customs data, MY 2023/24 exports reached 4.4 MMT, with the United Kingdom, Iran, South Korea, and Turkey as the top export destinations.

The poorer EU corn crop is expected to result in tight stocks at the end of MY 2024/25, particularly in the major eastern EU producing Member States.



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

## Barley

**Table 4. Production, Supply and Distribution - Barley**

Barley	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	USDA Official	New Post	USDA Official
Market Year Begins						
European Union						
Area Harvested (1000 HA)	10,319	10,295	10,370	10,346	10,350	10,296
Beginning Stocks (1000 MT)	5,287	5,287	5,726	5,729	5,450	5,467
Production (1000 MT)	51,829	51,782	47,865	47,769	50,750	50,335
MY Imports (1000 MT)	1,976	1,976	1,919	1,969	1,400	1,400
TY Imports (1000 MT)	2,157	2,168	1,650	1,800	1,400	1,400
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	59,092	59,045	55,510	55,467	57,600	57,202
MY Exports (1000 MT)	6,666	6,666	6,760	6,760	6,300	6,150
TY Exports (1000 MT)	6,614	6,615	6,600	6,600	6,300	6,150
Feed and Residual (1000 MT)	33,800	33,800	30,700	30,840	33,200	33,100
FSI Consumption (1000 MT)	12,900	12,850	12,600	12,400	12,900	12,850
Total Consumption (1000 MT)	46,700	46,650	43,300	43,240	46,100	45,950
Ending Stocks (1000 MT)	5,726	5,729	5,450	5,467	5,200	5,102
Total Distribution (1000 MT)	59,092	59,045	55,510	55,467	57,600	57,202
Yield (MT/HA)	5.0227	5.0298	4.6311	4.6171	4.9034	4.8888
(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 2024/2025 = October 2024 - September 2025						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

Source: FAS EU Posts.

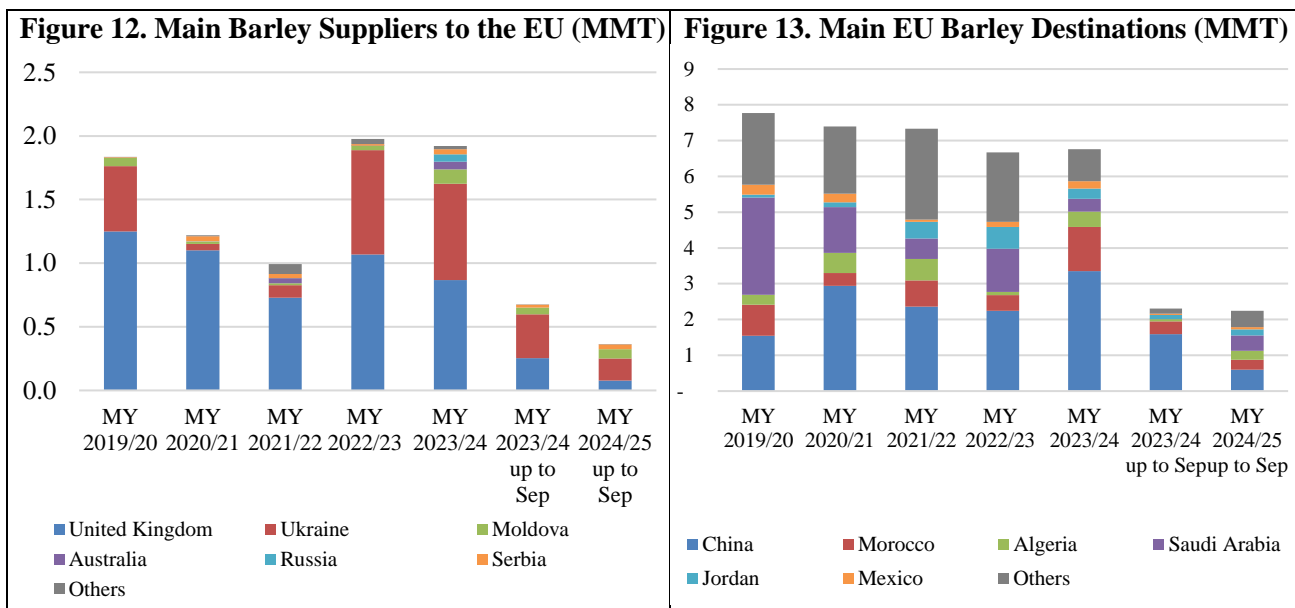
Barley harvested area for MY 2024/25 has been revised down to 10.3 million Ha. The decline was recorded particularly in Hungary, where a rebound in corn plantings took a toll on barley area. Growing area also went down in Spain, Ireland, Finland, Estonia, Italy, and Greece. At the same time, EU barley production showed a moderate rebound due to the recovery in yields in Spain, the Nordic countries and Bulgaria after the previous year's serious setback. Conversely, barley harvest fell short of expectations especially in France, Hungary, Germany, and Poland. In Germany, Poland and France, saturated soil and wet conditions hampered field works and root development. In Hungary, the notable fall in barley supply was the combination of lower yields and a 30 percent drop in area. However, Spain's strong yields recovery has offset all these losses and pegged EU's barley production at 50.3 MMT.

Total barley consumption in MY 2024/25 is anticipated to edge up to 45.9 MMT, driven by increasing demand for feed barley, the expansion in processing capacities as industrial uses witness a moderate increase, and a rebound in the malting sector. Demand for feed barley is estimated at 33.1 MMT, recovering from the drop in MY 2023/24, particularly in Spain and the Nordic countries. Feed barley consumption is also forecast to increase in Romania, but expected to fall in France, Ireland, and Poland.

EU barley imports are projected to decline to 1.4 MMT in MY 2024/25, due to the improved domestic supply in Spain. Nevertheless, Black Sea feed barley is likely to keep its competitive pricing, and Ukraine and the United Kingdom will remain the major non-EU suppliers of barley.

Despite the rebounding production, higher domestic demand for barley in feed combined with the limited availability in France, the EU's largest barley exporter, is expected to limit exportable availabilities. Additionally, demand for French barley in China, the EU's main export partner, is forecast to decrease further because of a high level of stocks and the increasing level of China's production of other feed grains such as corn. By contrast, Germany, Romania, and Bulgaria are ready to export more barley to North Africa and the Middle East to make up the gap left by reduced Russian and Australian availabilities.

Even with higher production and limited export volume, a tight balance and a low level of ending stocks (5.1 MMT) are expected in MY 2024/25. This is driven by the foreseen decline in Ukraine's exports to the EU and the increase in the EU's feed barley consumption.



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

## Rye

**Table 5. Production, Supply and Distribution - Rye**

Rye	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	1,773	1,773	1,880	1,883	1,750	1,740
Beginning Stocks (1000 MT)	888	888	836	1,203	660	1,306
Production (1000 MT)	7,545	7,546	7,633	7,636	7,200	7,100
MY Imports (1000 MT)	109	109	187	187	45	60
TY Imports (1000 MT)	131	131	170	200	50	70
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	8,542	8,543	8,656	9,026	7,905	8,466
MY Exports (1000 MT)	141	141	236	236	175	190
TY Exports (1000 MT)	138	138	180	230	175	190
Feed and Residual (1000 MT)	4,700	4,300	4,700	4,400	4,400	4,200
FSI Consumption (1000 MT)	2,865	2,899	3,060	3,084	2,900	3,015
Total Consumption (1000 MT)	7,565	7,199	7,760	7,484	7,300	7,215
Ending Stocks (1000 MT)	836	1,203	660	1,306	430	1,061
Total Distribution (1000 MT)	8,542	8,543	8,656	9,026	7,905	8,466
Yield (MT/HA)	4.2555	4.2561	4.0601	4.0552	4.1143	4.0805

(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 2024/2025 = October 2025 - September 2025  
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

## Oats

**Table 6. Production, Supply and Distribution - Oats**

Oats	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	2,347	2,347	2,296	2,298	2,400	2,480
Beginning Stocks (1000 MT)	424	424	605	618	290	274
Production (1000 MT)	7,509	7,485	5,931	5,950	7,600	7,600
MY Imports (1000 MT)	170	174	107	107	75	180
TY Imports (1000 MT)	125	125	100	110	75	110
TY Imp. from U.S. (1000 MT)						-
Total Supply (1000 MT)	8,103	8,083	6,643	6,675	7,965	8,054
MY Exports (1000 MT)	83	83	118	118	185	94
TY Exports (1000 MT)	90	94	120	100	185	100
Feed and Residual (1000 MT)	5,950	5,930	4,800	4,850	5,950	5,900
FSI Consumption (1000 MT)	1,465	1,452	1,435	1,433	1,450	1,465
Total Consumption (1000 MT)	7,415	7,382	6,235	6,283	7,400	7,365
Ending Stocks (1000 MT)	605	618	290	274	380	595
Total Distribution (1000 MT)	8,103	8,083	6,643	6,675	7,965	8,054
Yield (MT/HA)	3.1994	3.1892	2.5832	2.5892	3.1667	3.0645

(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 2024/2025 = October 2025 - September 2025  
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

## Mixed Grains<sup>6</sup>

**Table 7. Production, Supply and Distribution – Mixed Grains**

Mixed Grain	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	3,173	3,160	3,109	3,060	2,920	2,890
Beginning Stocks (1000 MT)	680	680	962	940	750	788
Production (1000 MT)	13,332	13,309	12,738	12,760	12,150	12,000
Total Supply (1000 MT)	14,012	13,989	13,700	13,700	12,900	12,788
Feed and Residual (1000 MT)	11,300	11,300	11,200	11,200	10,600	10,300
FSI Consumption (1000 MT)	1,750	1,749	1,750	1,712	1,700	1,585
Total Consumption (1000 MT)	13,050	13,049	12,950	12,912	12,300	11,885
Ending Stocks (1000 MT)	962	940	750	788	600	903
Total Distribution (1000 MT)	14,012	13,989	13,700	13,700	12,900	12,788
Yield (MT/HA)	4.2017	4.2117	4.0971	4.1699	4.161	4.1522

(1000 HA) ,(1000 MT) ,(MT/HA)  
 MY = Marketing Year, begins with the month listed at the top of each column  
 TY = Trade Year, which for Mixed Grain begins in October for all countries. TY 2024/2025 = October 2024 - September 2025  
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

## Sorghum

**Table 8. Production, Supply and Distribution – Sorghum**

Sorghum	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	124	130	156	164	210	222
Beginning Stocks (1000 MT)	18	18	16	16	19	13
Production (1000 MT)	513	535	801	825	1,060	1,125
MY Imports (1000 MT)	42	42	20	20	15	15
TY Imports (1000 MT)	38	38	16	17	15	15
TY Imp. from U.S. (1000 MT)	1	2	0	1	-	-
Total Supply (1000 MT)	573	595	837	861	1,094	1,153
MY Exports (1000 MT)	15	15	13	13	20	12
TY Exports (1000 MT)	14	14	11	13	15	12
Feed and Residual (1000 MT)	530	552	790	820	1,040	1,110
FSI Consumption (1000 MT)	12	12	15	15	15	15
Total Consumption (1000 MT)	542	564	805	835	1,055	1,125
Ending Stocks (1000 MT)	16	16	19	13	19	16
Total Distribution (1000 MT)	573	595	837	861	1,094	1,153
Yield (MT/HA)	4.1371	4.1154	5.1346	5.0305	5.0476	5.0676

(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 2024/2025 = October 2024 - September 2025  
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

<sup>6</sup>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.



## Section III. Rice

**Table 9. Production, Supply and Distribution – Rice**

Rice, Milled Market Year Begins	2022/2023		2023/2024		2024/2025	
	Sep 2022		Sep 2023		Sep 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	329	331	356	345	395	394
Beginning Stocks (1000 MT)	905	905	823	826	698	756
Milled Production (1000 MT)	1,287	1,292	1,380	1,435	1,716	1,587
Rough Production (1000 MT)	2,010	2,142	2,155	2,372	2,680	2,644
Milling Rate (.9999) (1000 MT)	6,404	6,032	6,404	6,050	6,404	6,002
MY Imports (1000 MT)	2,320	2,320	2,102	2,106	2,200	2,060
TY Imports (1000 MT)	2,170	2,170	2,200	2,106	2,200	2,060
TY Imp. from U.S. (1000 MT)	17	17	-	-	-	-
Total Supply (1000 MT)	4,512	4,517	4,305	4,367	4,614	4,403
MY Exports (1000 MT)	389	401	357	361	400	380
TY Exports (1000 MT)	365	379	360	361	400	380
Consumption and Residual (1000 MT)	3,300	3,290	3,250	3,250	3,350	3,300
Ending Stocks (1000 MT)	823	826	698	756	864	723
Total Distribution (1000 MT)	4,512	4,517	4,305	4,367	4,614	4,403
Yield (Rough) (MT/HA)	6.1094	6.4713	6.0534	6.8754	6.7848	6.7107

(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 2024/2025 = January 2025 - December 2025  
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

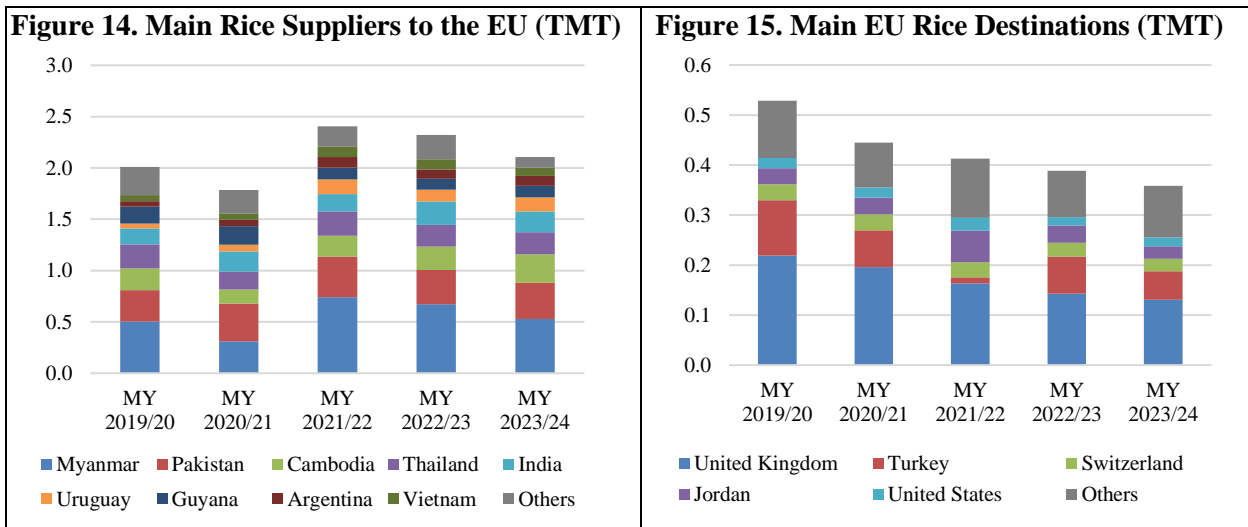
In MY 2024/25, EU rice production<sup>7</sup> is forecast to reach 1.6 MMT, driven by higher volumes projected in Italy, Spain, Greece, France, Romania, and Hungary, while production declines are anticipated in Portugal and Bulgaria. In MY 2024/25, EU rice planted area is projected to go up to 394 thousand Ha, mainly driven by the larger area planted in Italy, Spain (especially in the region of Andalusia), Greece, France, and Romania. Rice planted area is projected to remain stable compared to MY 2023/24 in Portugal, Bulgaria, and Hungary.

Torrential rain and flooding caused by the DANA (a Spanish acronym for a High-Altitude Isolated Depression) on October 29, 2024, had devastating consequences in the Valencia region of Spain. While rice had already been harvested in the area, industry sources report damage to warehouses and deterioration of rice in storage. Although it is too early to assess the extent of the damage, this rice may eventually be withdrawn from the market.

EU rice consumption is anticipated to recover in MY 2024/25 compared to MY 2023/24, as food inflation eases, and demand grows for foods that reduce the amount of time and effort required for meal preparation and which can be used in a wide variety of recipes.

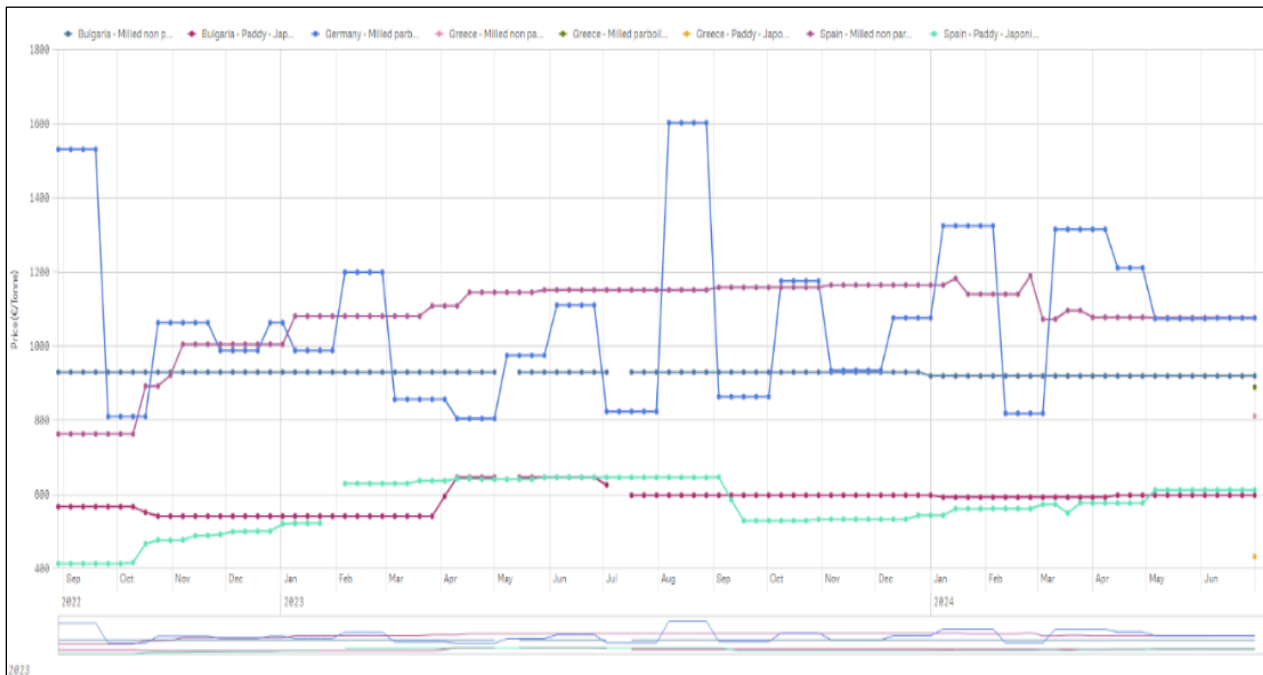
<sup>7</sup> EU rice production is concentrated in seven Member States: Italy, Spain, Greece, Portugal, Bulgaria, France, and Romania.

The larger domestic availability anticipated for MY 2024/25 is expected to push EU rice import needs down and allow exports to recover. However, the EU continues to consolidate its net importing position, as domestic Indica rice production falls short of meeting the bloc’s needs. Other than the main EU rice producing Member States, the Netherlands is a key gateway for rice imports to other EU Member States, as is Belgium, given its large milling capacity and absence of domestic production. Other large EU rice importing Member States include France and Germany, given their large consumption volumes. Most of the EU rice exports consist of Japonica varieties to the United Kingdom and Turkey.



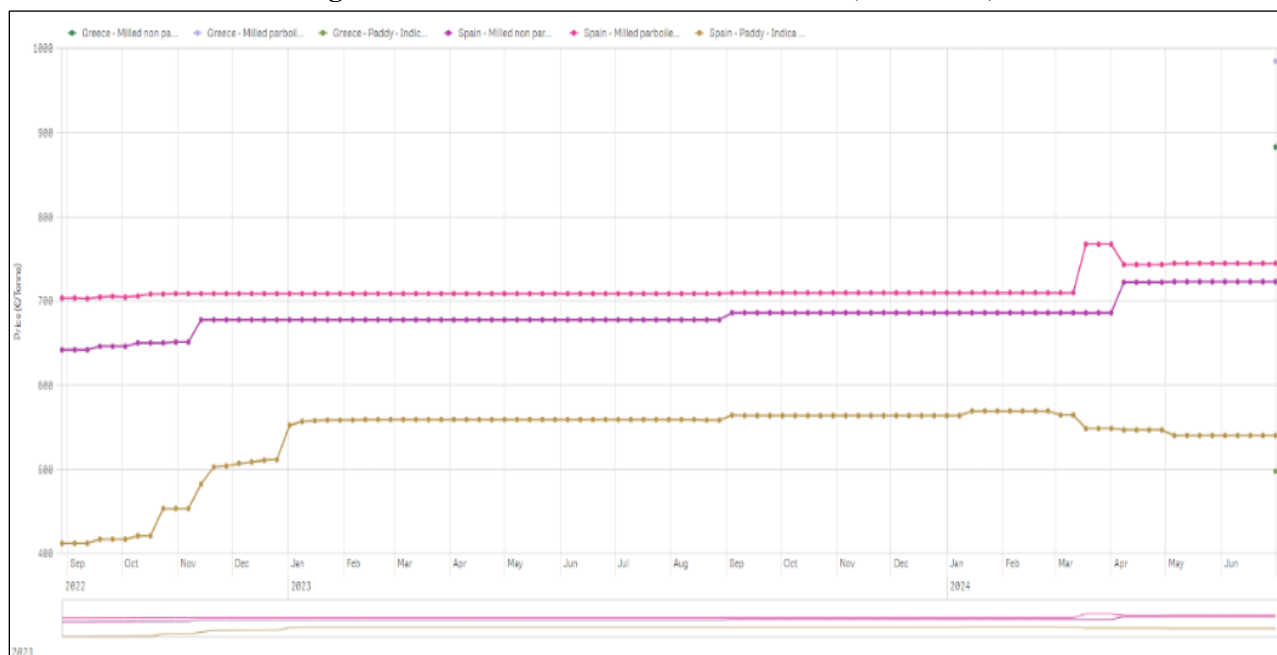
Source: FAS Madrid based on Trade Data Monitor, LLC data.

**Figure 16. EU Japonica Rice Prices Evolution (Euros/MT)**



Source: [Directorate-General for Agriculture and Rural Development](#).

**Figure 17. EU Indica Rice Prices Evolution (Euros/MT)**



Source: [Directorate-General for Agriculture and Rural Development](#).

## Section IV. Policy<sup>8</sup>

### EU Deforestation Regulation Update

In June 2023, the European Commission (EC) adopted the EU Deforestation Regulation (EUDR) aimed to prevent products causing deforestation entering the EU market. The proposal targets products identified by the EC as the main drivers of deforestation including soybean, palm oil, and related products. The Regulation is set to enter into force on December 30, 2024. However, following intense pressure from stakeholders and third countries, on October 2, 2024, the EC proposed delaying EUDR implementation by 12 months. While the delay has not been officially adopted at the time of writing, it is expected that the EUDR will now enter into force in 2025. This will give operators, including feed importers and manufacturers, additional time to prepare.

### EU Rice Policy

From September 6, 2024, under [Commission Implementing Regulation 2024/2403](#), the import duty for husked rice under HS Code 100620, other than husked basmati rice of the varieties referred to in Article 1 of [Commission Regulation 972/2006](#), shall be 42.50 Euros/MT.

<sup>8</sup> For additional information on EU Policy affecting grains, please consult the [Grain and Feed Annual 2024](#) EU GAIN Report.

## Main EU Trading Partners Policy Updates Affecting Grains Markets

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](#). As of February 2025, Ukraine will have a regulatory procedure in place enabling its Competent Authority to exchange digital phytosanitary certificates through IPPC ePhyto Hub with other participants of this system.

## Abbreviations used in this report

<b>CY</b>	Calendar Year
<b>e</b>	Estimate (of a value/number for the current, not yet completed, marketing year)
<b>EU</b>	European Union (Current EU-27, without the UK).
<b>f</b>	Forecast (of a value/number for the next, not yet started, marketing year)
<b>FAS</b>	Foreign Agricultural Service
<b>Coarse Grains</b>	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.
<b>Ha</b>	Hectares
<b>HRI</b>	Hotels, Restaurants, and Institutions
<b>IPAD</b>	International Production Assessment Division
<b>FSI</b>	Food, Seed, and Industrial
<b>MMT</b>	Million Metric Tons
<b>MS</b>	EU Member State(s)
<b>MT</b>	Metric Ton (1000 kg)
<b>MY</b>	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
<b>TMT</b>	Thousand Metric Tons
<b>TY</b>	Trade Year. July to June for wheat, October to September for coarse grains, and January to December for rice
<b>UK</b>	United Kingdom
<b>U.S.</b>	United States

## Related Reports

Title	Date
<a href="#">Grain and feed Market Update Bulgaria - 2024</a>	08/22/2024
<a href="#">EU Grain Summer Update 2024</a>	08/05/2024
<a href="#">Grain and feed Market Update Bulgaria - 2024</a>	06/12/2024
<a href="#">Favorable Spring Conditions Promise a Sizeable Grain Crop in Spain</a>	05/23/2024
<a href="#">EU Grain and Feed Annual 2024</a>	04/15/2024

## Acknowledgements

This report would not have been possible without the valuable expert contributions from the following Foreign Agricultural Service analysts:

Xavier Audran, FAS/Paris covering France and wheat section author  
Ornella Bettini, FAS/Rome covering Italy and rice section author  
Mila Boshnakova, FAS/Sofia covering Bulgaria  
Monica Dobrescu, FAS/Bucharest covering Romania and corn chapter author  
Dimosthenis Faniadis, FAS/Rome covering Greece  
Jana Fischer, FAS/Prague covering the Czech Republic and Slovakia  
Bob Flach, FAS/The Hague covering the Netherlands, Finland, Denmark, and Sweden  
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Andreja Misir, FAS/Zagreb covering Croatia  
Sophie Bolla, FAS/USEU/Brussels covering EU policy  
Tania deBelder, FAS/USEU/Brussels covering Belgium and Luxembourg  
Steve Knight, FAS/London covering Ireland  
Denys Sobolev, FAS/Kyev covering Ukraine policy developments affecting the EU grain market.

### **Attachments:**

No Attachments