

Cereals market situation

Meeting of the Expert Group for Agricultural Markets –
Subgroup Arable Crops and Olive Oil

27 November 2025

2024/2025 marketing year

EU27 2024/2025 Area

(million ha)

	2023/24 Estimate	2024/25		
		Oct Forecast	Nov Forecast	vs. 2023/24 (%)
Soft wheat	21.9	20.3	20.3	-7.3
Durum wheat	2.3	2.2	2.2	-5.2
Barley	10.4	10.3	10.3	-0.8
Maize	8.3	8.7	8.7	4.5
Rye	1.9	1.7	1.7	-8.5
Oats	2.3	2.5	2.5	9.2
Total	50.6	49.0	49.1	-3.0

Source: DG AGRI - E4

EU27 2024/2025 Production

(million tonnes)

	2023/24 Estimate	2024/25			
		Oct Forecast	Nov Forecast	vs. 2023/24 (%)	vs. 5-year average
Soft wheat	125.2	110.9	111.0	-11.4	-12.4
Durum wheat	7.4	7.3	7.7	3.3	3.1
Barley	47.0	48.6	48.7	3.4	-6.9
Maize	61.2	59.3	59.2	-3.2	-10.6
Rye	7.4	6.9	6.9	-6.3	-11.5
Oats	5.8	7.7	7.7	31.5	6.4
Total	267.8	253.6	253.9	-5.2	-9.4

Source: DG AGRI - E4

2025/2026 marketing year

EU27 2025/2026 Area

(million ha)

	2024/25	2025/26			
	Forecast	Oct Projection	Nov Projection	vs. 2024/25 (%)	vs. 5-year av. (%)
Soft wheat	20.3	21.4	21.5	5.9	0.3
Durum wheat	2.2	2.1	2.2	0.8	-1.5
Barley	10.3	10.1	10.0	-3.0	-3.2
Maize	8.7	8.4	8.5	-2.2	-4.9
Rye	1.7	1.6	1.6	-4.7	-12.0
Oats	2.5	2.6	2.6	3.8	5.7
Total	49.1	49.9	50.1	2.0	-2.2

Source: DG AGRI - E4

EU27 2025/2026 Production

(million tonnes)

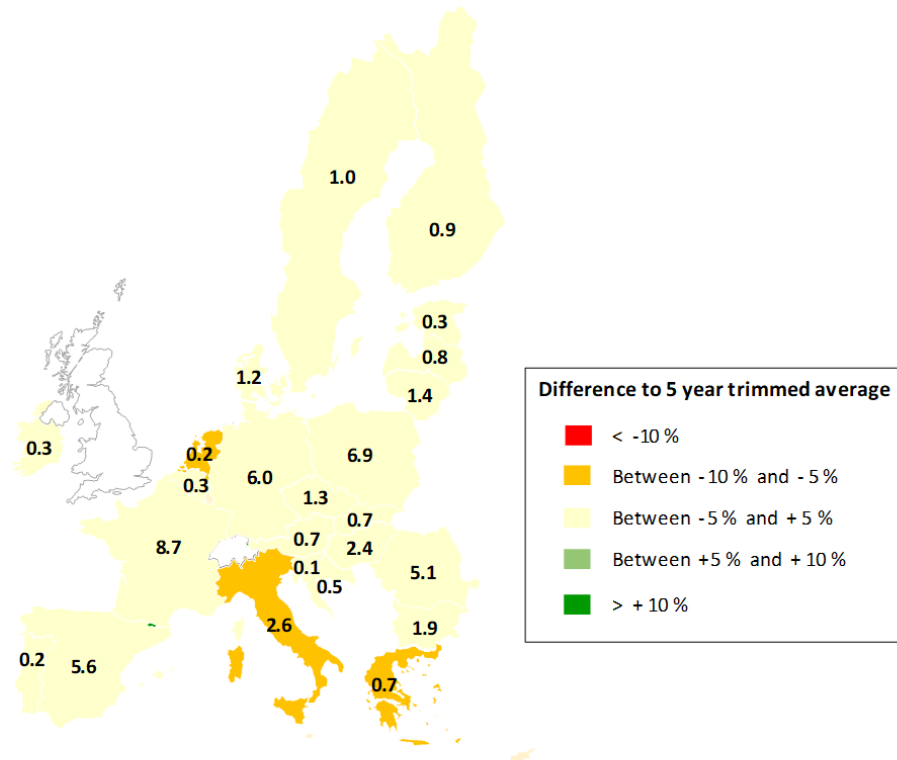
	2024/25 Forecast	2025/26			
		Oct Projection	Nov Projection	vs. 2024/25 (%)	vs. 5-year av. (%)
Soft wheat	111.0	133.4	134.2	20.9	9.1
Durum wheat	7.7	8.3	8.2	7.6	9.7
Barley	48.7	55.9	55.6	14.3	10.2
Maize	59.2	56.8	57.6	-2.7	-8.0
Rye	6.9	7.4	7.4	6.5	-1.6
Oats	7.7	8.9	8.9	15.8	18.8
Total	253.9	285.7	286.9	13.0	5.6

Source: DG AGRI - E4

Total cereals 2025/26 - area

October 2025 Projection

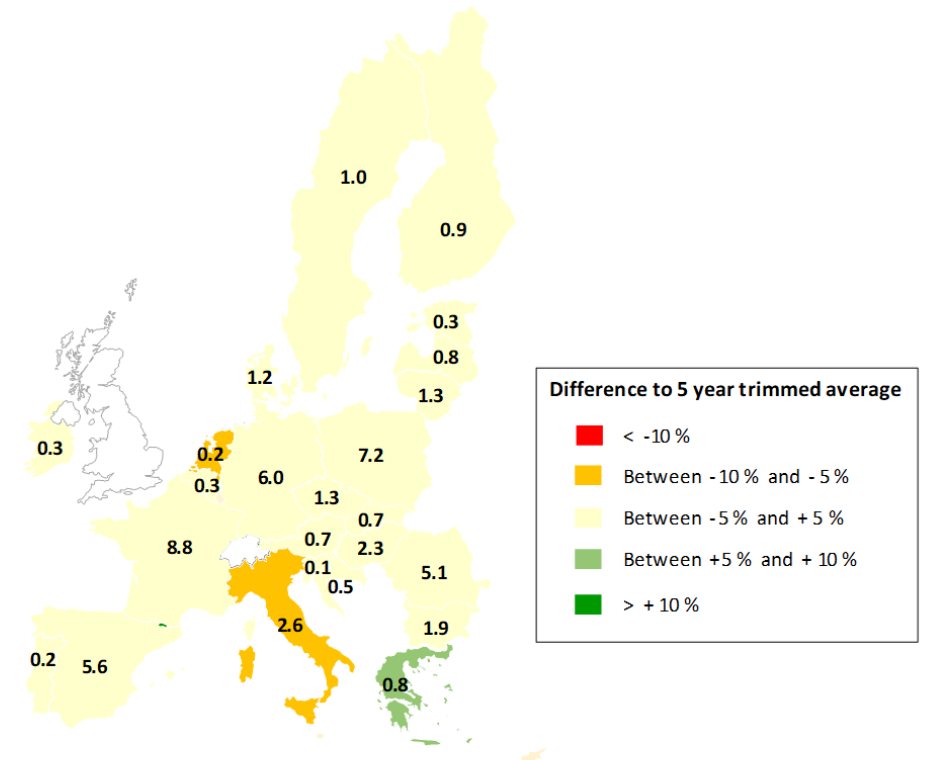
Total cereals area - 2025 projection (million hectares)



EU area: 49.9 million hectares - difference to 5 year trimmed average: -2.6%

November 2025 Projection

Total cereals area - 2025 projection (million hectares)

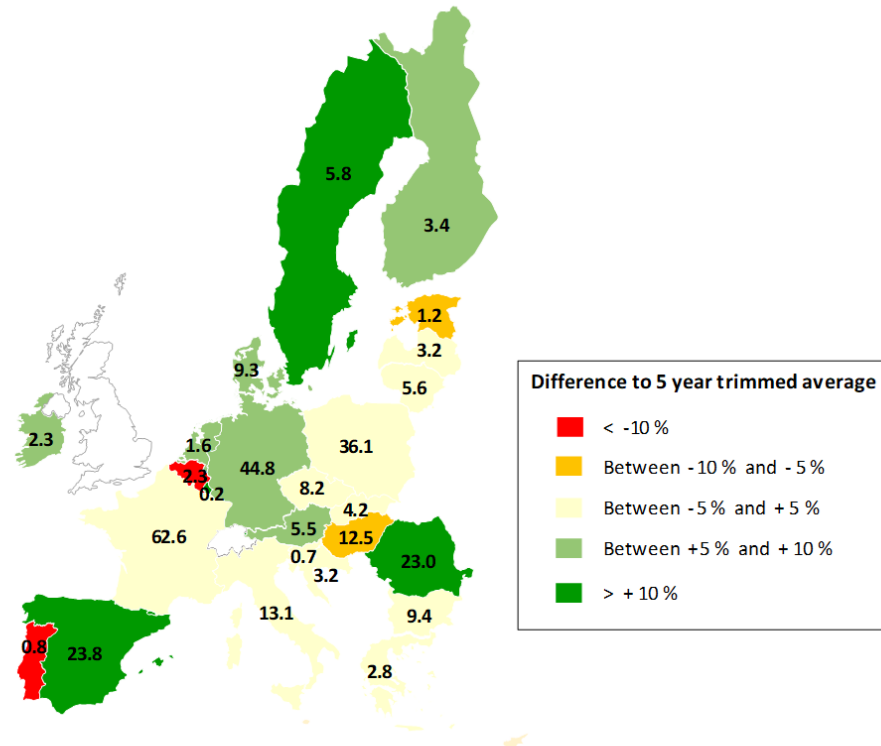


EU area: 50.1 million hectares - difference to 5 year trimmed average: -2.2%

Total cereals 2025/26 - production

October 2025 Projection

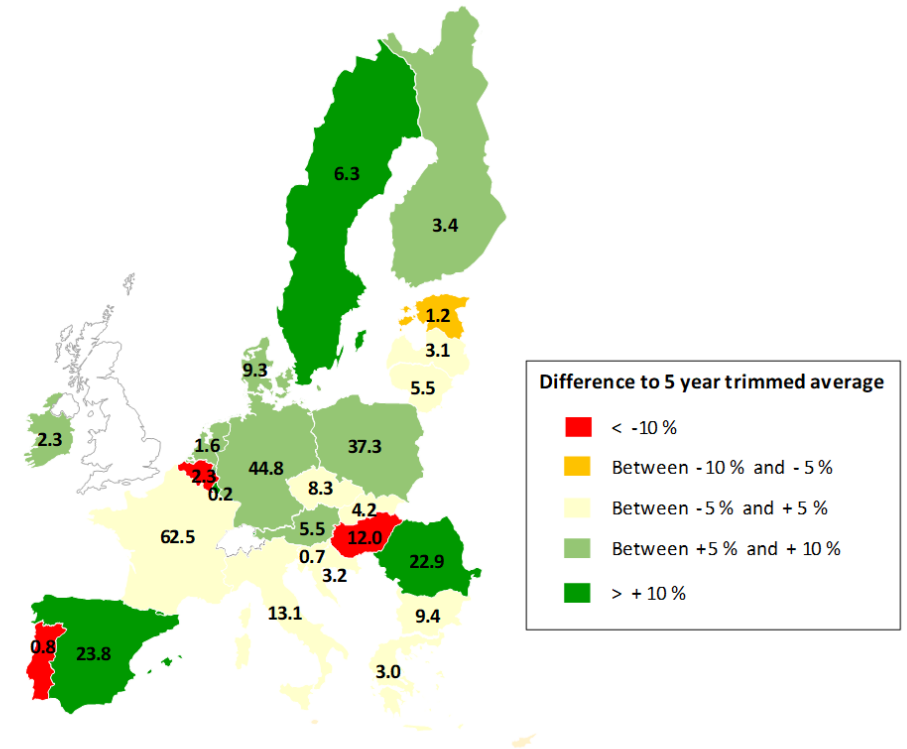
Total cereals production - 2025 projection (million tonnes)



EU production: 285.7 million tonnes - difference to 5 year trimmed average: +5.2%

November 2025 Projection

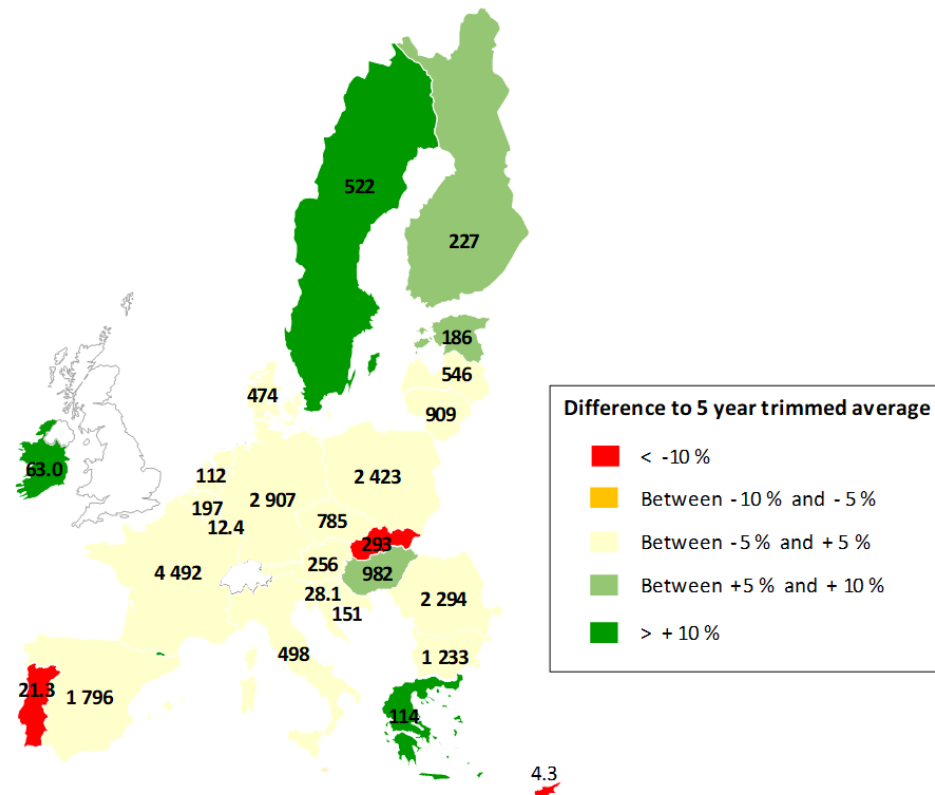
Total cereals production - 2025 projection (million tonnes)



EU production: 286.9 million tonnes - difference to 5 year trimmed average: +5.6%

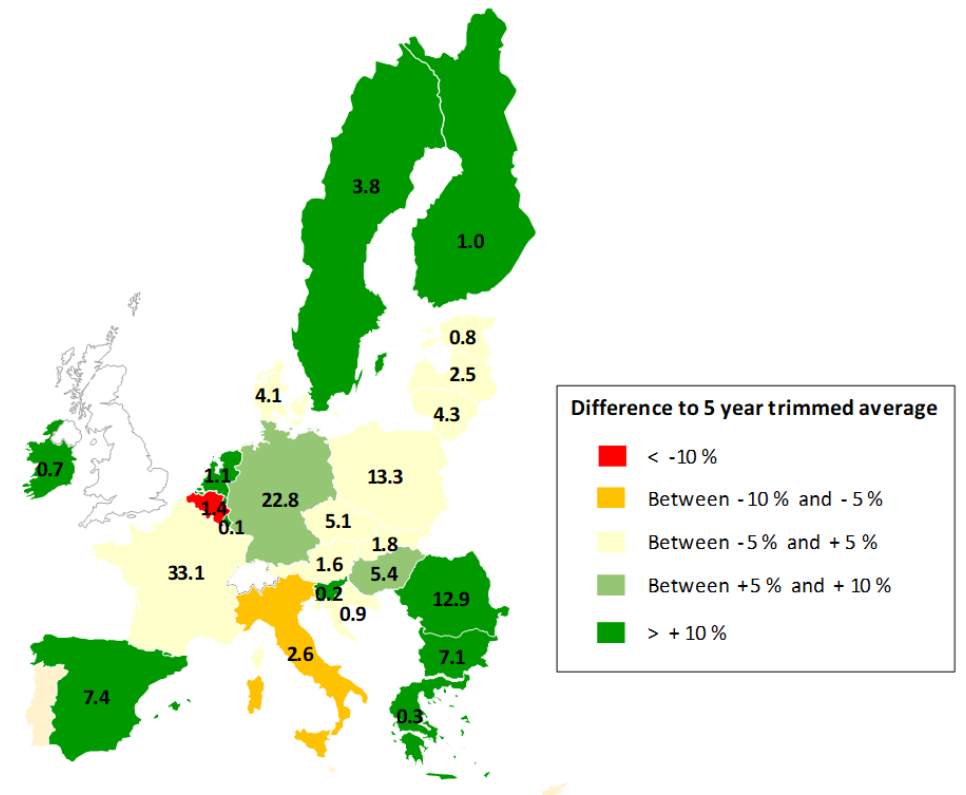
Soft wheat 2025/26

Soft wheat area - 2025 projection (thousand hectares)



EU area: 21 525 thousand hectares - difference to 5 year trimmed average: +0.3%

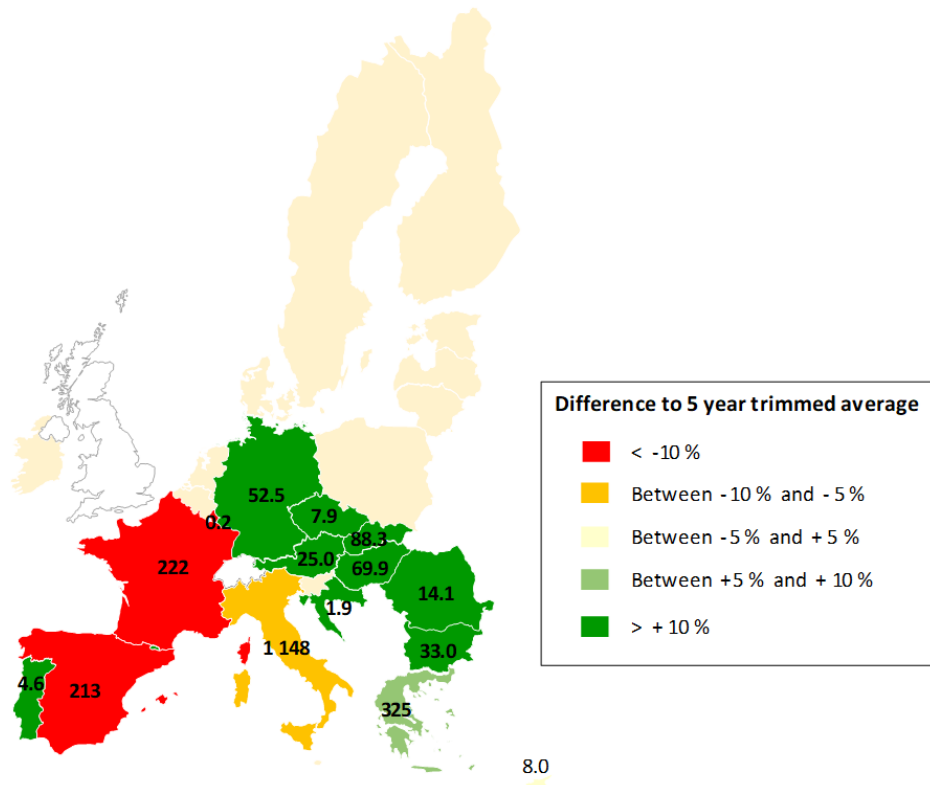
Soft wheat production - 2025 projection (million tonnes)



EU production: 134.2 million tonnes - difference to 5 year trimmed average: +9.1%

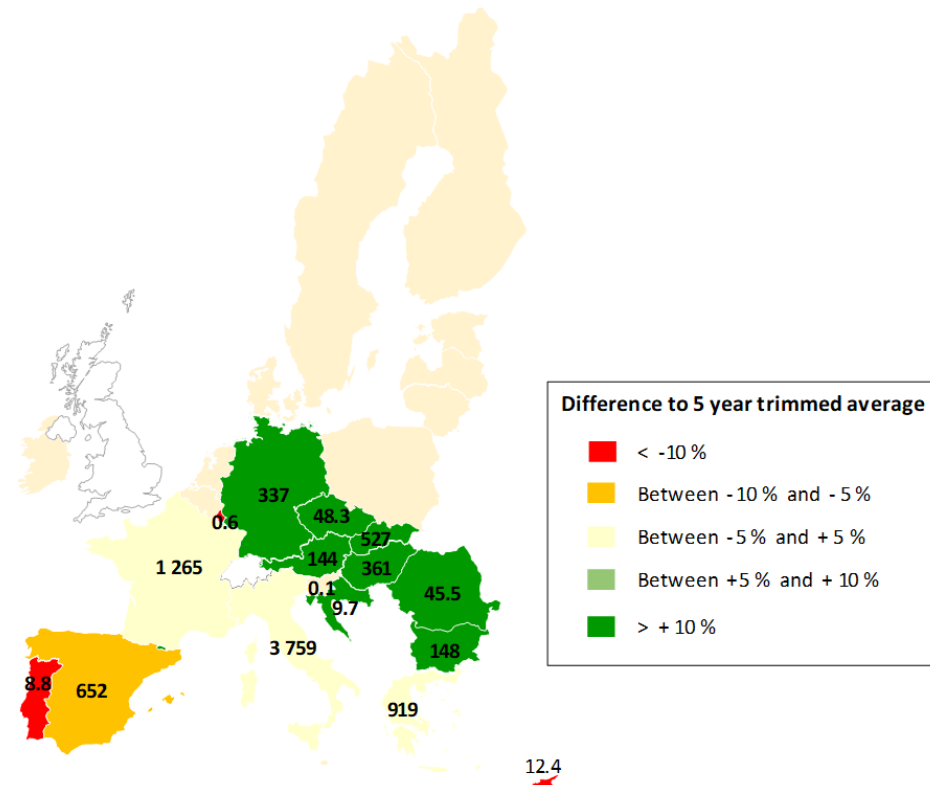
Durum wheat 2025/26

Durum wheat area - 2025 projection (thousand hectares)



EU area: 2 213 thousand hectares - difference to 5 year trimmed average: -1.5%

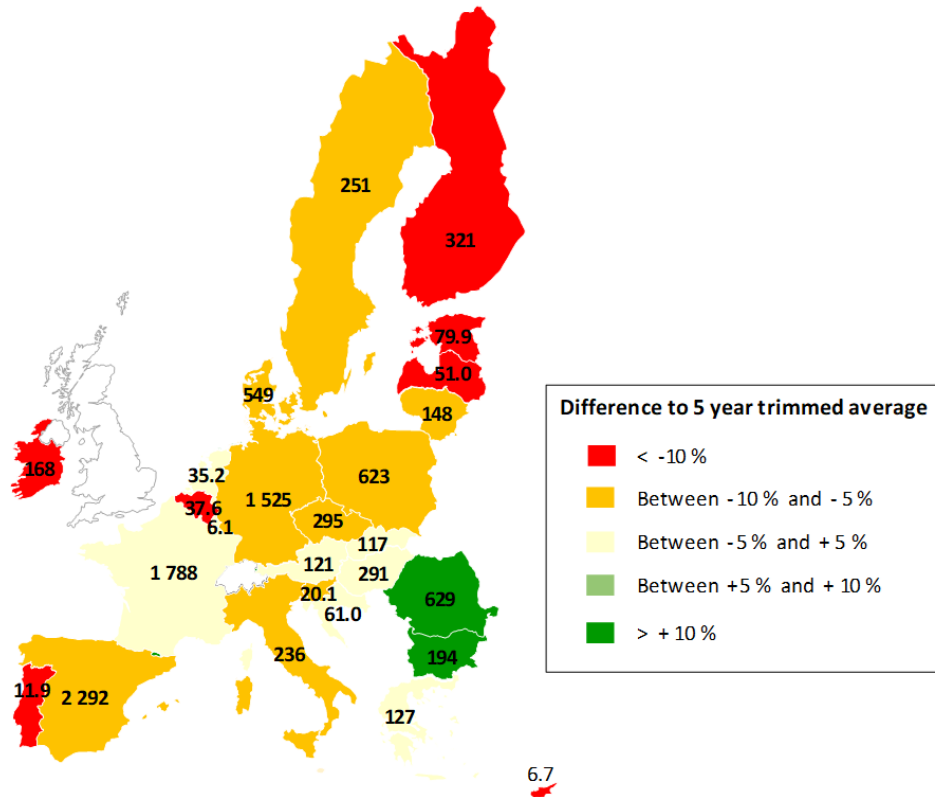
Durum wheat production - 2025 projection (thousand tonnes)



EU production: 8 237 thousand tonnes - difference to 5 year trimmed average: +9.7%

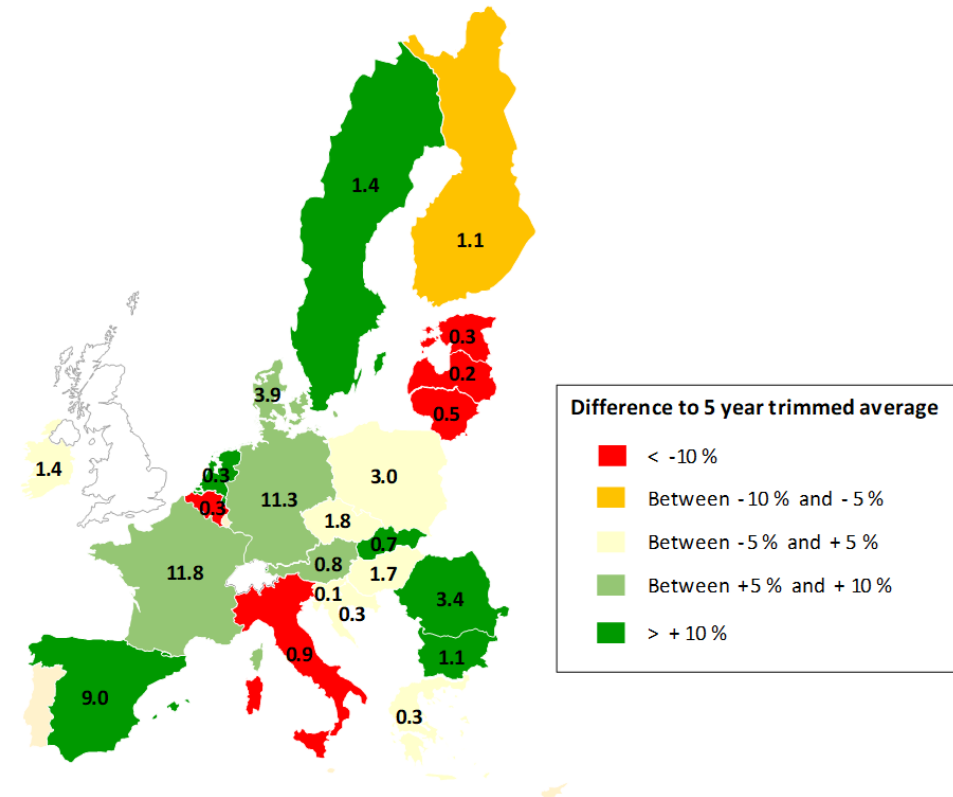
Barley 2025/26

Barley area - 2025 projection (thousand hectares)



EU area: 9 984 thousand hectares - difference to 5 year trimmed average: -3.2%

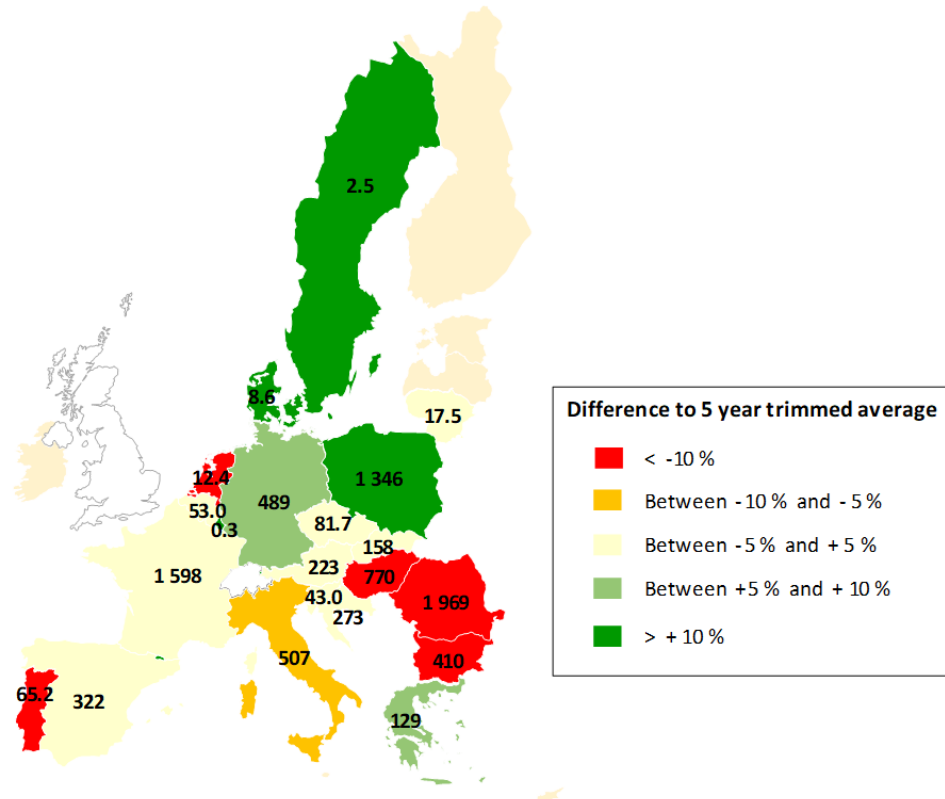
Barley production - 2025 projection (million tonnes)



EU production: 55.6 million tonnes - difference to 5 year trimmed average: +10.1%

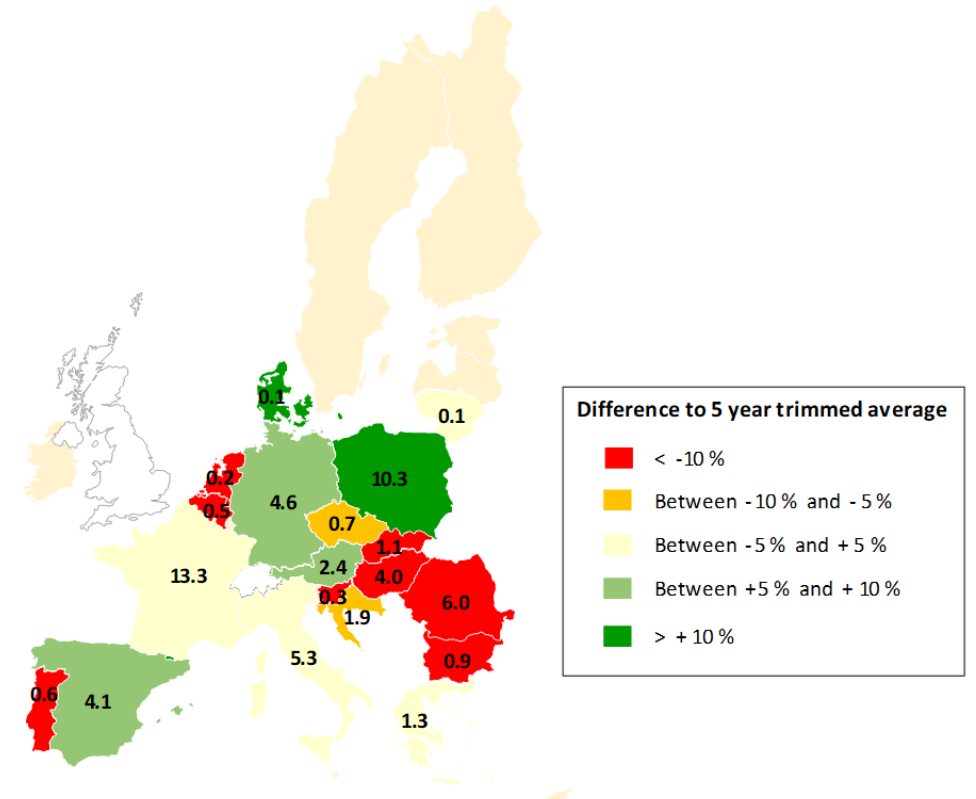
Maize 2025/26

Maize area - 2025 projection (thousand hectares)



EU area: 8 478 thousand hectares - difference to 5 year trimmed average: -4.9%

Maize production - 2025 projection (million tonnes)



EU production: 57.6 million tonnes - difference to 5 year trimmed average: -8%

EU 2025/2026 Usable Production: comparison with other forecasters

(million tonnes)

	EC DG AGRI 27-November	Stratégie Grains 13-November	COCERAL 16-September
Soft Wheat	134.2	136.8	135.4
Durum Wheat	8.2	8.8	8.4
Barley	55.6	56.6	57.2
Maize	57.6	56.7	56.5
Rye	7.4	7.7	7.5
Total Cereals	286.9	289.1	286.8

2025/2026 – Production evolution

	month/month variation	year/year variation	vs. 5-year average
<i>France</i>	-0.1%	16.4%	3.2%
<i>Germany</i>	0.0%	15.3%	5.9%
<i>Poland</i>	3.2%	7.7%	6.4%
<i>Romania</i>	-0.3%	29.3%	19.8%
<i>Spain</i>	0.0%	19.1%	15.2%
<i>Italy</i>	0.0%	6.1%	-4.4%
<i>Hungary</i>	-4.3%	-5.0%	-13.3%

**: 75% of the EU production*

Source: DG AGRI - E4

2025/2026 – Member States details

		EU	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	NL	AT	PL	PT	RO	SI	SK	FI	SE
Soft wheat	Area	21 525	197	1 233	785	474	2 907	186	63	114	1 796	4 492	151	498	4	546	909	12	982	112	256	2 423	21	2 294	28	293	227	522
	Yield	6.28	7.37	5.81	6.61	8.70	7.91	4.11	10.64	2.93	4.17	7.42	5.93	5.19	1.53	4.60	4.77	6.65	5.53	10.20	6.26	5.54	2.32	5.65	6.11	6.04	4.29	7.27
	Production	135 224	1 449	7 168	5 189	4 121	22 991	765	670	334	7 484	33 328	893	2 585	7	2 510	4 337	83	5 426	1 147	1 601	13 413	49	12 965	171	1 766	975	3 796
Durum wheat	Area	2 213	0	33	8	0	53	0	0	325	213	222	2	1 148	8	0	0	0	70	0	25	0	5	14	0	88	0	0
	Yield	3.76		4.55	6.18		6.49			2.86	3.09	5.76	5.16	3.31	1.56			3.59	5.21		5.82		1.94	3.25	8.00	6.03		
	Production	8 324	0	150	49	0	341	0	0	929	659	1 278	10	3 799	13	0	0	1	365	0	145	0	9	46	0	532	0	0
Barley	Area	9 984	38	194	295	549	1 525	80	168	127	2 292	1 788	61	236	7	51	148	6	291	35	121	623	12	629	20	117	321	251
	Yield	5.62	7.29	5.66	6.28	7.16	7.46	3.50	8.25	2.73	3.95	6.64	5.20	3.92	0.94	3.49	3.55	6.44	5.83	7.93	6.75	4.79	2.61	5.47	5.74	6.12	3.48	5.69
	Production	56 099	274	1 098	1 850	3 933	11 377	280	1 385	346	9 065	11 875	317	923	6	178	524	39	1 695	279	817	2 987	31	3 441	115	717	1 119	1 427
Grain maize	Area	8 478	53	410	82	9	489	0	0	129	322	1 598	273	507	0	0	18	0	770	12	223	1 346	65	1 969	43	158	0	2
	Yield	6.82	9.60	2.21	8.16	6.95	9.40			10.28	12.83	8.38	7.00	10.44			6.29	8.21	5.22	12.86	10.70	7.66	9.48	3.04	7.92	7.08		7.39
	Production	57 860	509	905	667	60	4 596	0	0	1 326	4 132	13 397	1 911	5 289	0	0	110	2	4 022	159	2 385	10 313	618	5 978	341	1 122	0	18
Rye	Area	1 621	1	7	20	109	531	18	4	8	96	27	2	4	0	28	24	1	23	2	27	604	13	12	1	8	21	29
	Yield	4.65	3.23	2.36	5.66	7.00	5.74	3.90	10.00	1.90	2.77	3.96	3.41	3.03		4.38	2.38	6.63	3.09	3.59	5.26	3.81	0.98	3.30	4.47	3.86	4.33	6.11
	Production	7 537	3	17	115	766	3 053	70	37	15	267	107	6	11	0	121	56	8	72	7	144	2 305	13	40	5	30	91	179
Oats	Area	2 611	4	25	68	83	187	49	33	61	509	108	15	97	0	103	107	2	26	1	20	530	38	77	1	12	308	146
	Yield	3.44	3.42	2.24	4.13	5.80	5.01	2.20	6.46	1.26	2.63	4.42	3.20	2.36	1.54	2.74	2.15	5.31	2.93	5.71	4.03	3.49	1.12	2.64	3.35	2.85	3.93	4.70
	Production	8 979	15	56	282	482	938	107	212	77	1 335	477	48	230	0	281	230	10	77	7	82	1 850	43	204	3	35	1 210	688
Sorghum	Area	207	0	11	0	0	0	0	0	2	6	63	0	45	0	0	0	0	46	0	6	0	0	19	0	10	0	0
	Yield	4.24		2.09						3.08	3.89	4.57		5.83					3.66		7.45			1.28	4.33	4.11		
	Production	876	0	23	0	0	0	0	0	7	22	288	0	260	0	0	0	0	168	0	43	0	0	24	0	39	0	0
Triticale	Area	2 461	5	21	43	6	288	7	0	12	281	300	9	13	1	10	78	5	60	1	47	1 123	15	77	5	9	9	37
	Yield	4.75	5.88	3.67	5.32	6.40	6.35	4.05		2.19	3.22	5.19	4.40	4.71	1.46	4.64	3.24	6.61	4.13	5.61	6.21	4.71	1.30	4.96	5.32	4.20	4.51	5.44
	Production	11 692	30	77	226	39	1 830	28	0	27	903	1 557	40	62	1	45	253	33	248	7	295	5 285	19	380	28	37	43	200
Other cereals	Area	982	2	4	6	9	26	7	0	1	50	196	1	27	0	24	50	0	7	1	13	524	1	2	5	2	18	7
	Yield	2.90	3.98	1.72	1.74	3.28	4.24	1.07	0.00	2.62	2.48	3.62	1.24	2.95		1.25	1.04	4.41	1.51	0.00	3.17	2.94	1.13	1.78	0.84	0.96	2.62	3.72
	Production	2 849	8	7	11	31	109	7	0	2	123	710	1	79	0	30	52	1	11	0	41	1 543	1	3	4	2	47	27
Total cereals	Area	50 081	300	1 938	1 307	1 239	6 005	347	267	778	5 565	8 794	513	2 573	20	761	1 333	27	2 275	165	739	7 173	170	5 093	103	697	905	995
	Yield	5.78	7.64	4.90	6.42	7.61	7.53	3.63	8.62	3.94	4.31	7.17	6.28	5.15	1.34	4.16	4.17	6.48	5.31	9.73	7.52	5.25	4.61	4.53	6.47	6.14	3.85	6.37
	Production	289 440	2 288	9 501	8 389	9 431	45 234	1 257	2 305	3 063	23 991	63 017	3 226	13 238	26	3 165	5 562	177	12 084	1 606	5 553	37 696	783	23 081	667	4 280	3 484	6 336

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EU 2025/2026 Cereals Balance Sheet

last updated: 27/11/2025

2025/26 proj.

	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	7 873	1 782	674	18 347	45	281	1 891	63	170	31 127
Usable production	134 169	55 622	8 237	57 617	7 371	832	8 880	11 458	2 716	286 902
Area (thousand ha)	21 525	9 984	2 213	8 478	1 621	207	2 611	2 461	982	50 081
Yield (tonnes/ha)	6	6	4	7	5	4	3	5	3	6
Imports (from third countries)***	3 500	1 498	2 209	18 800	129	57	110	1	146	26 448
Total supply	145 542	58 902	11 120	94 764	7 545	1 170	10 881	11 522	3 031	344 477
Total domestic use	103 006	42 794	8 966	78 267	6 855	923	6 537	10 354	2 281	259 984
Human consumption	41 973	366	8 217	4 783	3 094	157	1 121	52	23	59 786
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 200	6 800	95	12 000	1 500		101	445	170	30 310
<i>of which bioethanol/biofuel</i>	<i>3 400</i>	<i>537</i>		<i>6 900</i>	<i>900</i>			<i>344</i>	<i>14</i>	<i>12 095</i>
Animal feed	46 428	33 163	205	60 736	1 917	733	4 912	9 288	1 802	159 185
Losses	805	334	49	346	44	5	53	69	16	1 721
Exports (to third countries)	31 000	10 109	933	3 000	168	15	117	4	17	45 362
Total use	134 006	52 903	9 899	81 267	7 023	938	6 654	10 358	2 298	305 346
Ending stocks**	11 536	5 999	1 221	13 497	522	232	4 227	1 165	733	39 131
Change in stocks**	3 663	4 217	547	-4 850	477	-50	2 335	1 101	563	8 004

* Marketing year: from July to June

** At the end of the marketing year

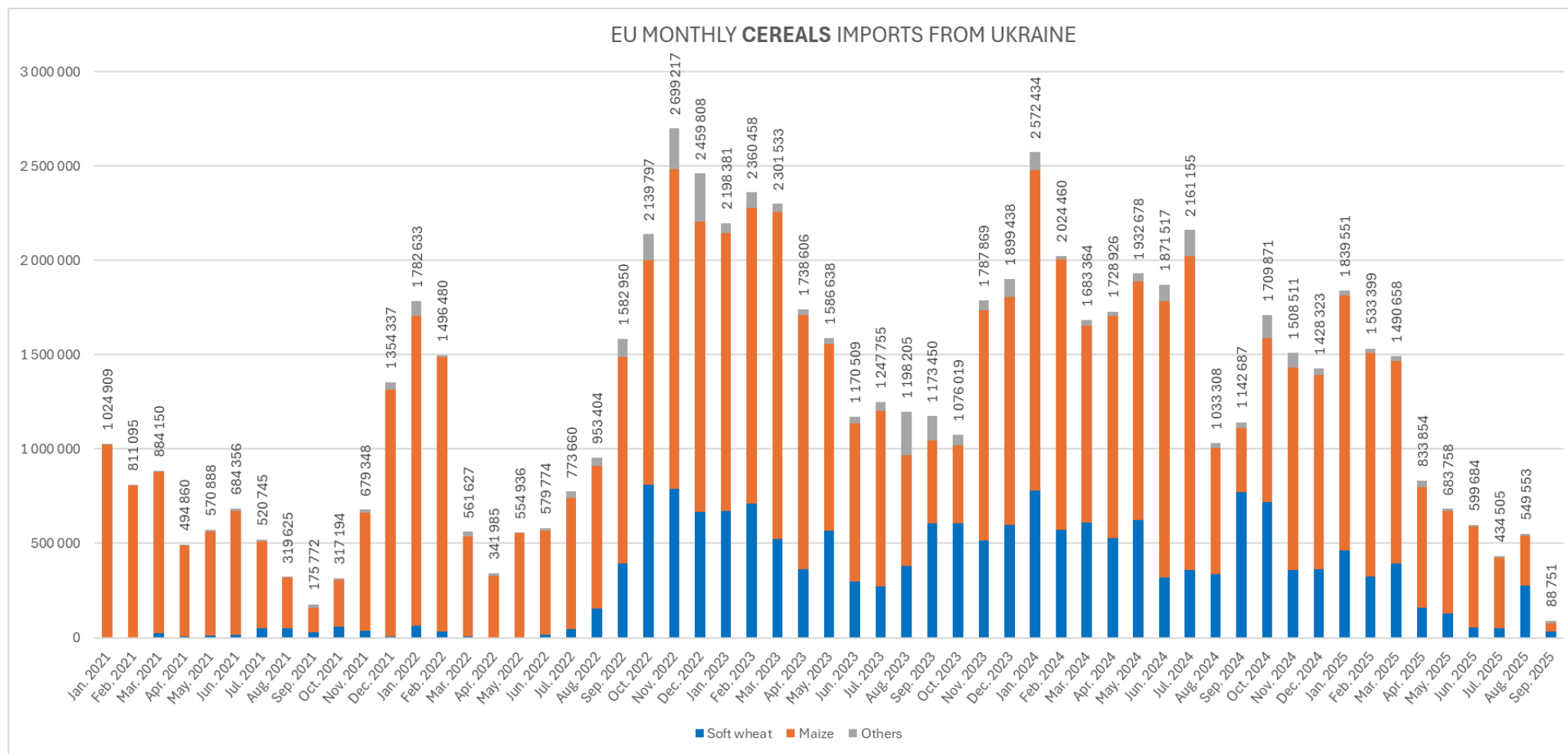
EU Cereals Balance Sheet 2025/2026 (Summary)

- Total **EU cereals production** is projected at **286.9 million tonnes** (+1.2 million tonnes compared to October). It is 5.6% above the five-year trimmed average and +13.0% year-on-year.
- **Trade** forecasts unchanged.

Focus on EU imports from Ukraine

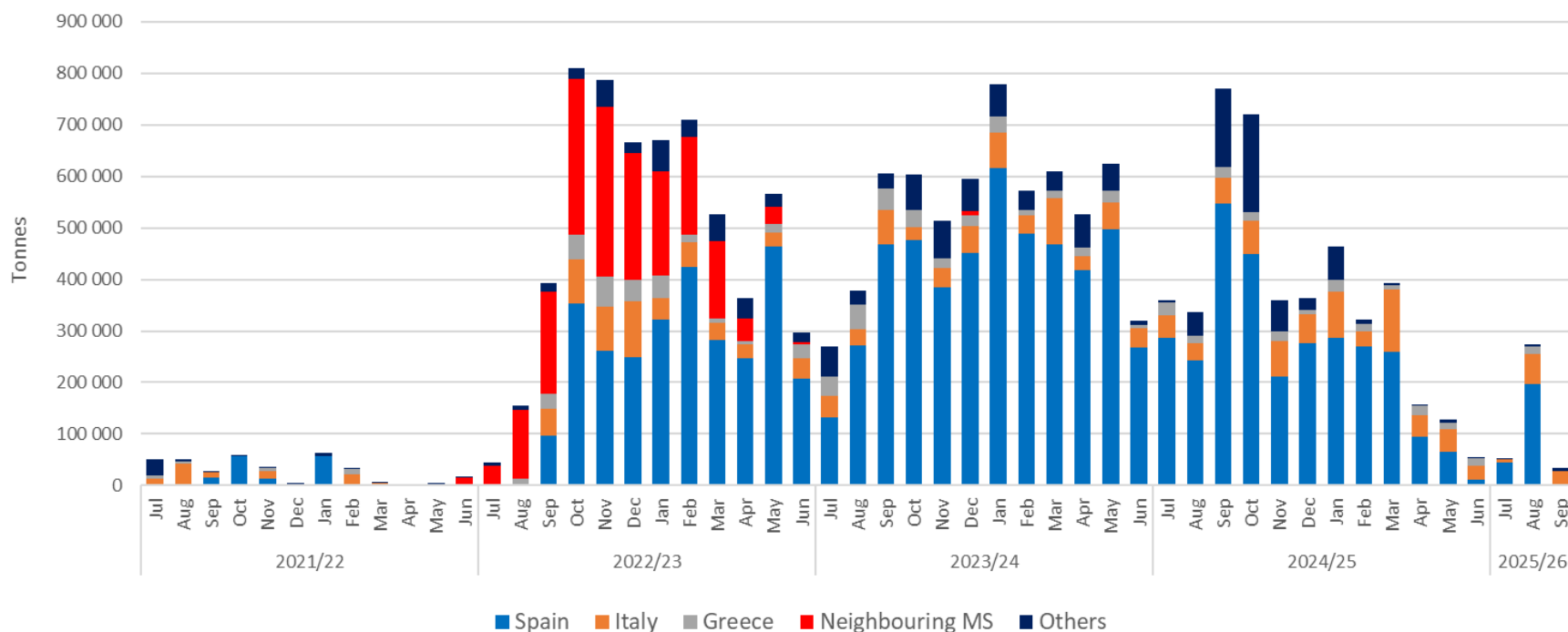
EU monthly cereals imports from Ukraine since January 2021 (in tonnes)

– source COMEXT

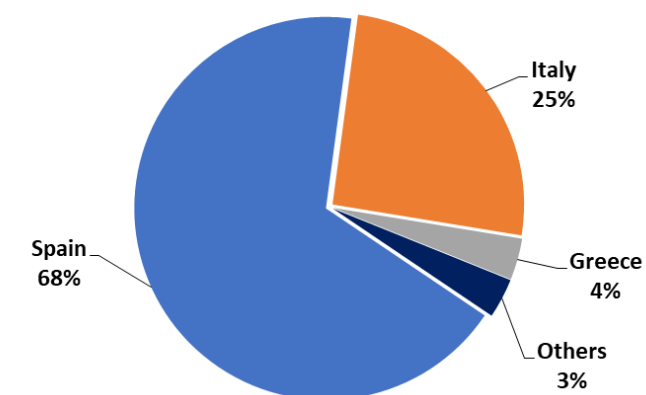


EU imports from Ukraine - wheat

EU monthly imports of **wheat** from Ukraine
(details for the main importing Member States)



WHEAT IMPORTS FROM UKRAINE
SHARE OF THE MAIN IMPORTING MEMBER STATES

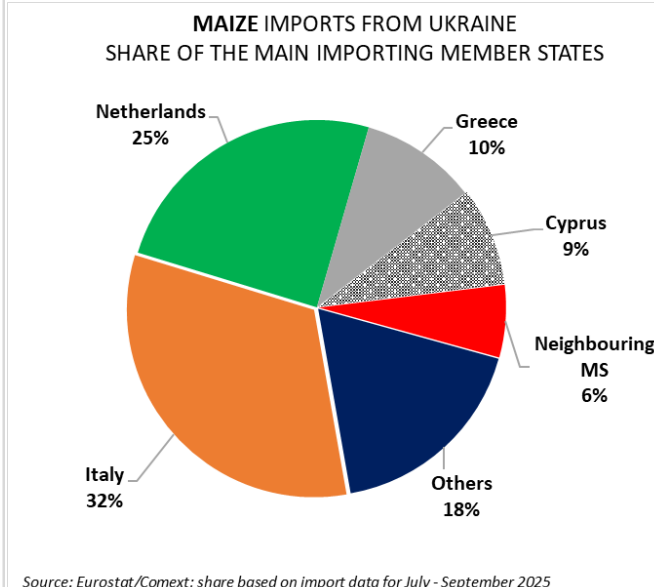
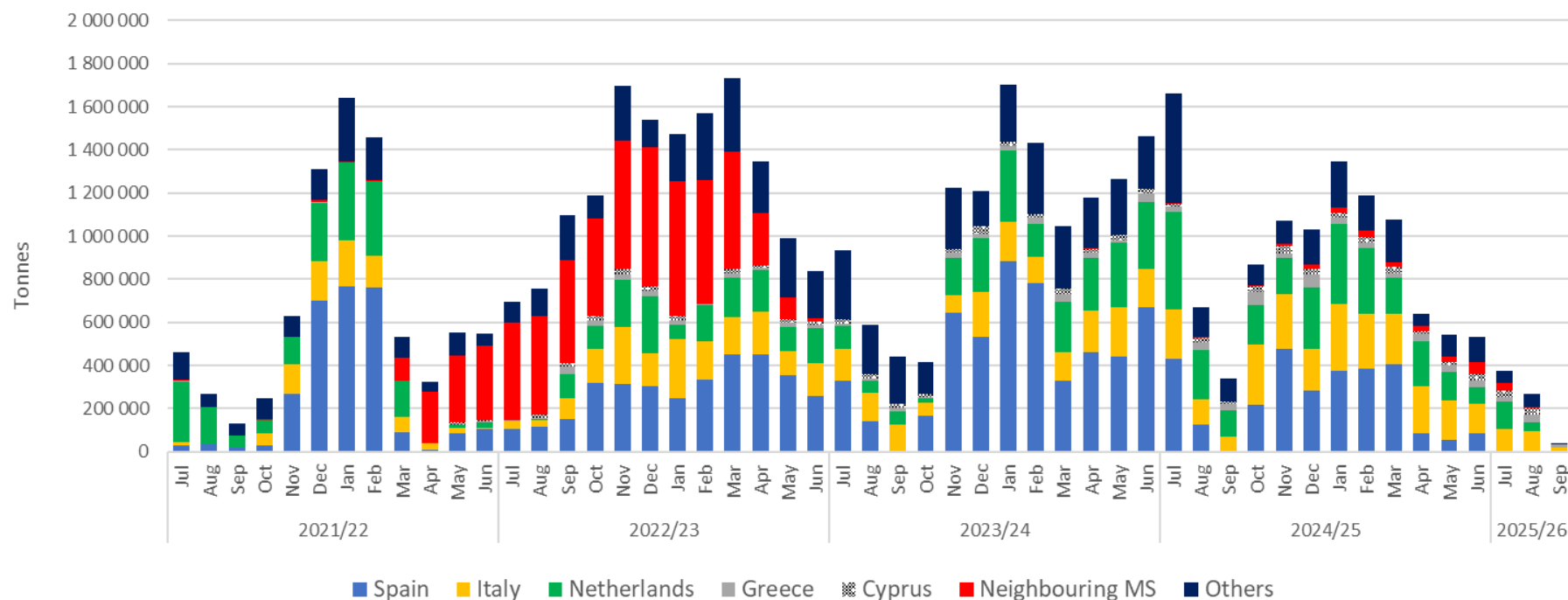


Source: Eurostat/Comext; share based on import data for July - September 2025

Source: Eurostat/Comext

EU imports from Ukraine - maize

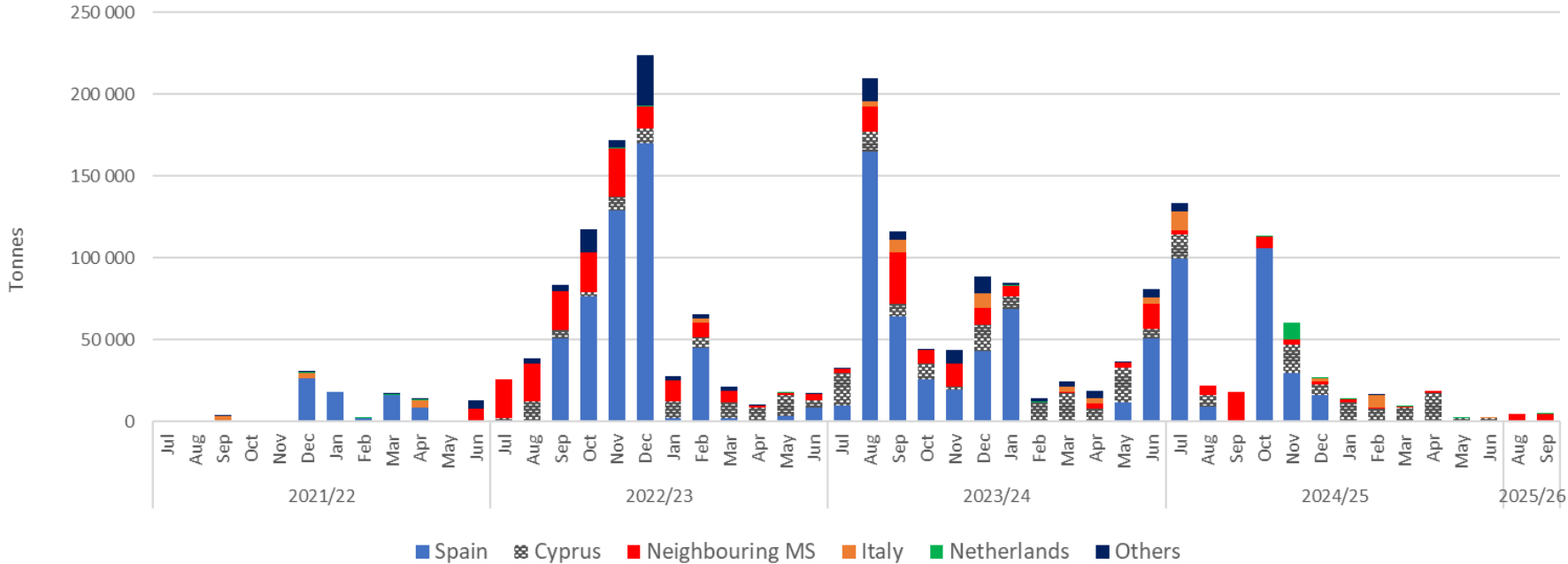
EU monthly imports of **maize** from Ukraine
(details for the main importing Member States)



Source: Eurostat/Comext

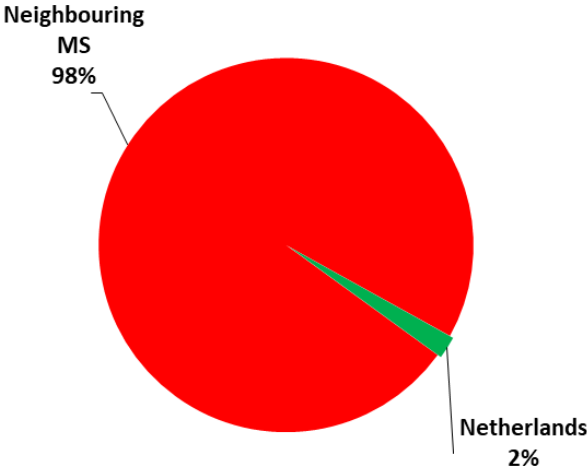
EU imports from Ukraine - barley

EU monthly imports of **barley** from Ukraine
(details for the main importing Member States)



Source: Eurostat/Comext

BARLEY IMPORTS FROM UKRAINE
SHARE OF THE MAIN IMPORTING MEMBER STATES

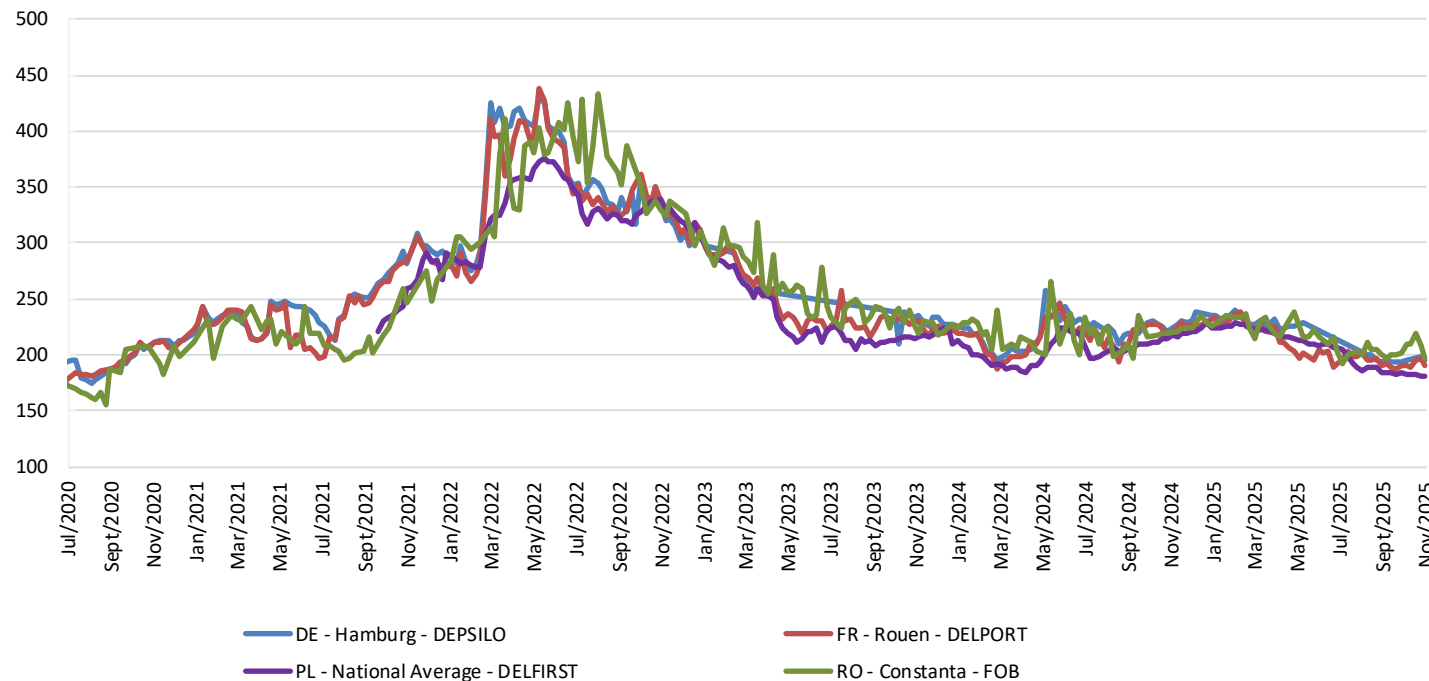


Source: Eurostat/Comext; share based on import data for July - September

EU cereals market prices

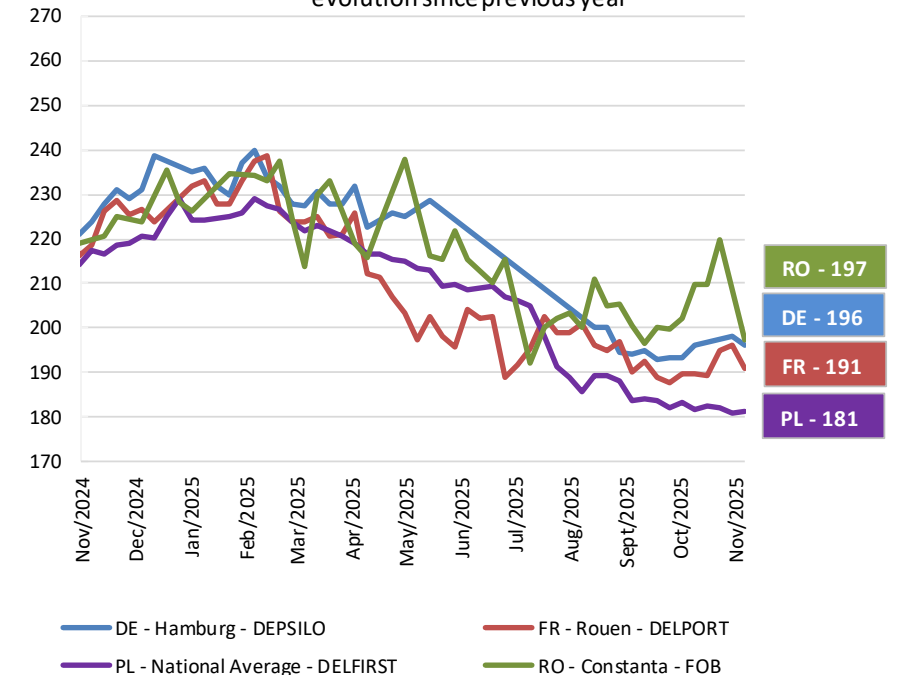
EU market prices for milling wheat – (EUR per tonne)

EU market prices for milling wheat (EUR/tonne)



Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art. 11, Annex I Point 1

EU market prices for milling wheat (EUR/tonne)
evolution since previous year



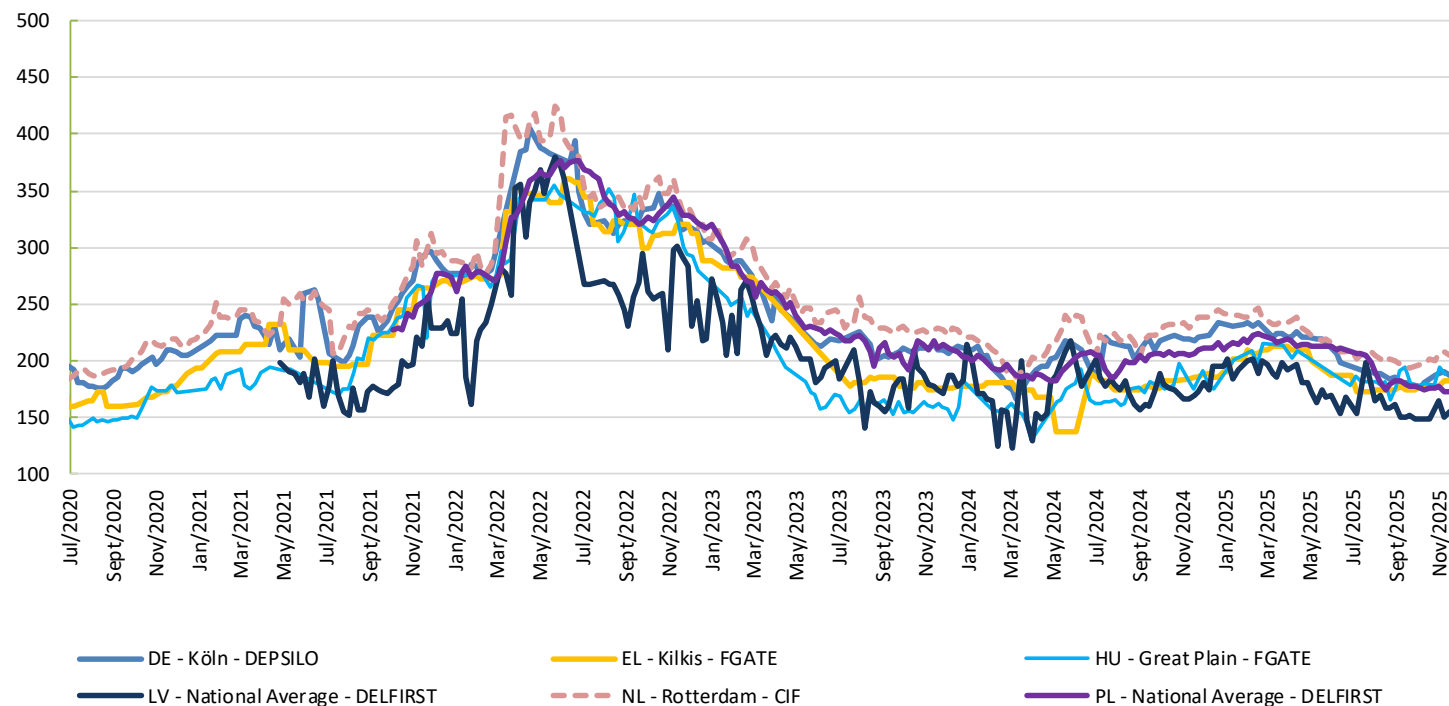
Source: Member States notifications - Commission Implementing Regulation (EU)

France
(DELPORT Rouen)

• EUR 191 per tonne; 0.7% month-on-month; -12.6% year-on-year

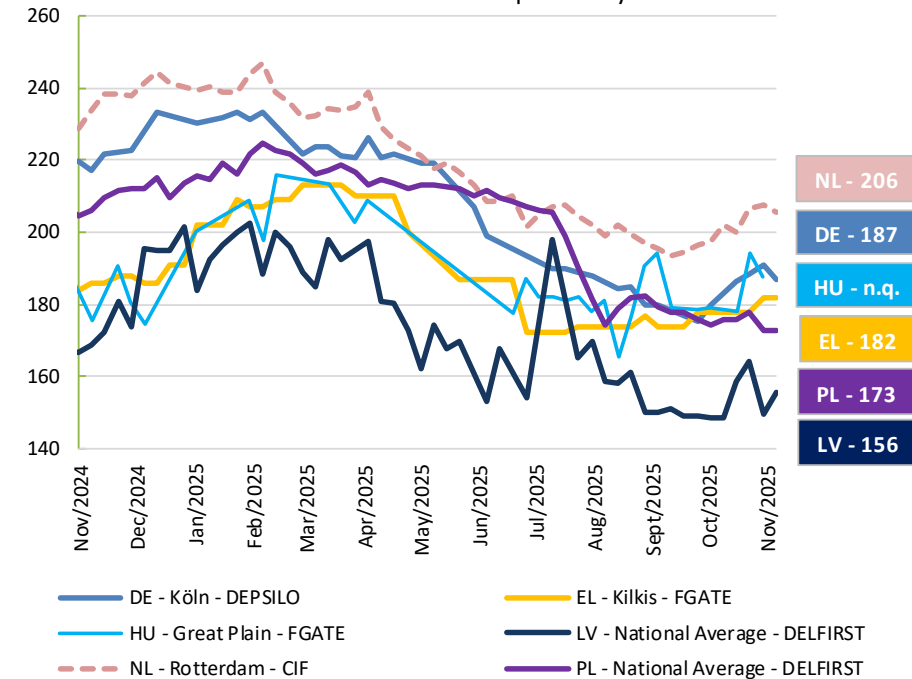
EU market prices for feed wheat – (EUR per tonne)

EU market prices for feed wheat (EUR/tonne)



Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art. 11, Annex I Point 1

EU market prices for feed wheat (EUR/tonne)
evolution since previous year

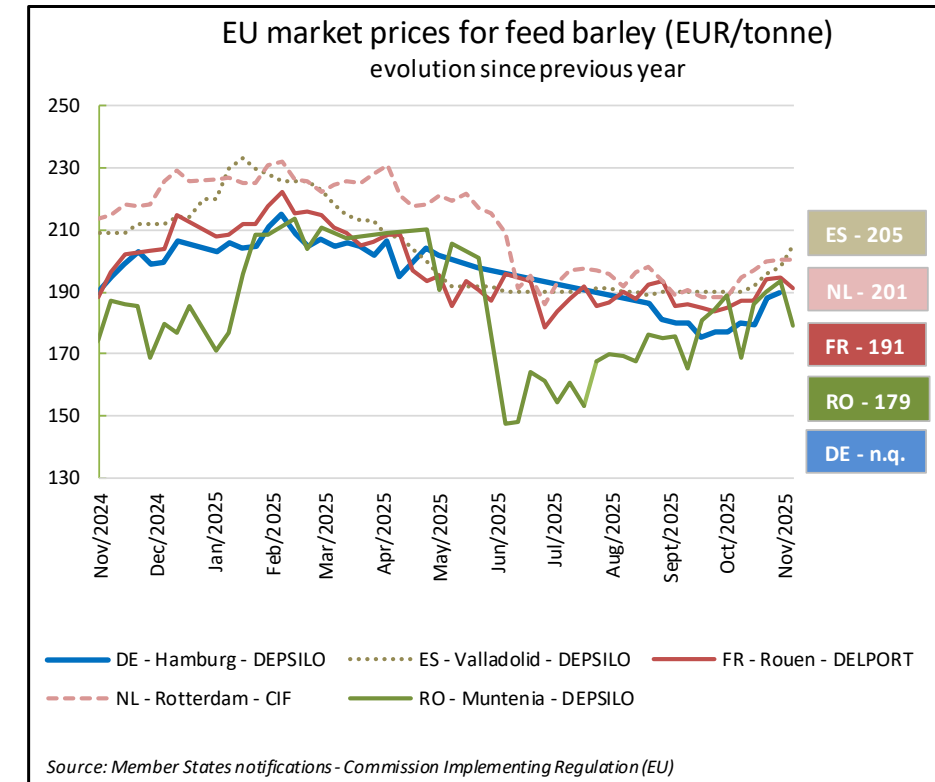
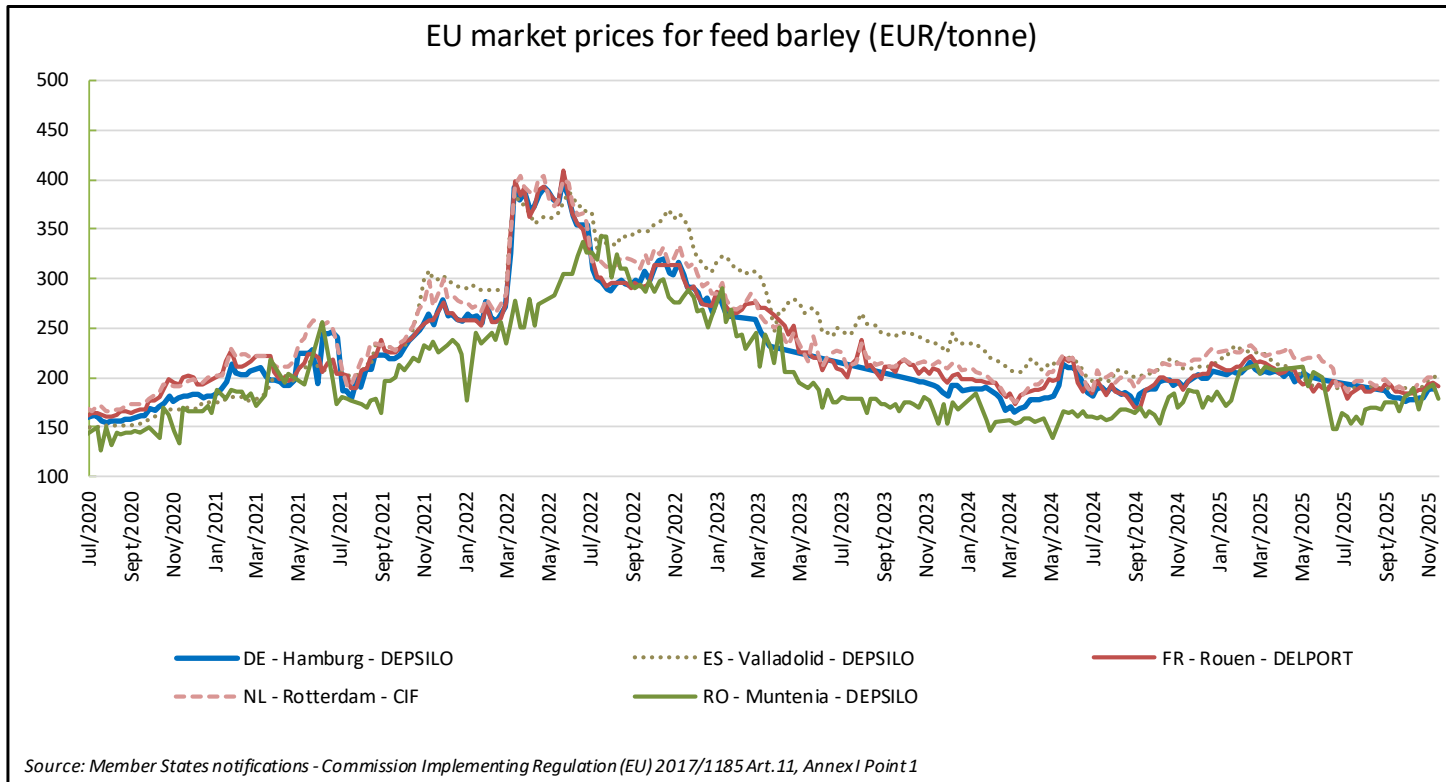


Source: Member States notifications - Commission Implementing Regulation (EU)

Poland
(DELFIRST –
National average)

• EUR 173 per tonne; -1.6% month-on-month; -16.0% year-on-year

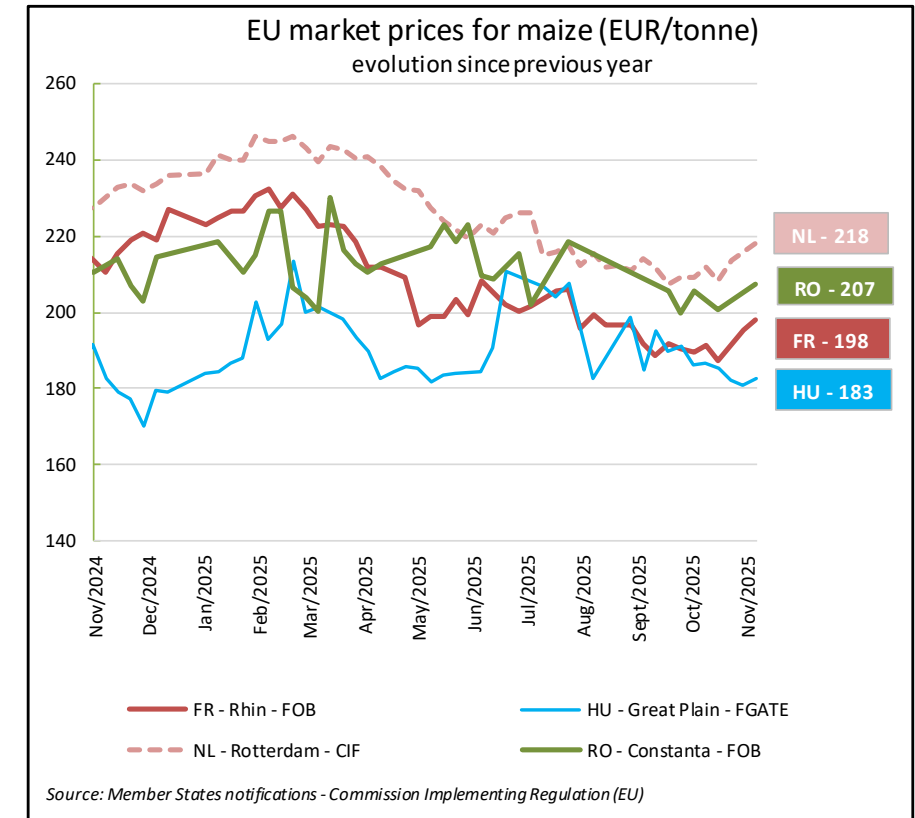
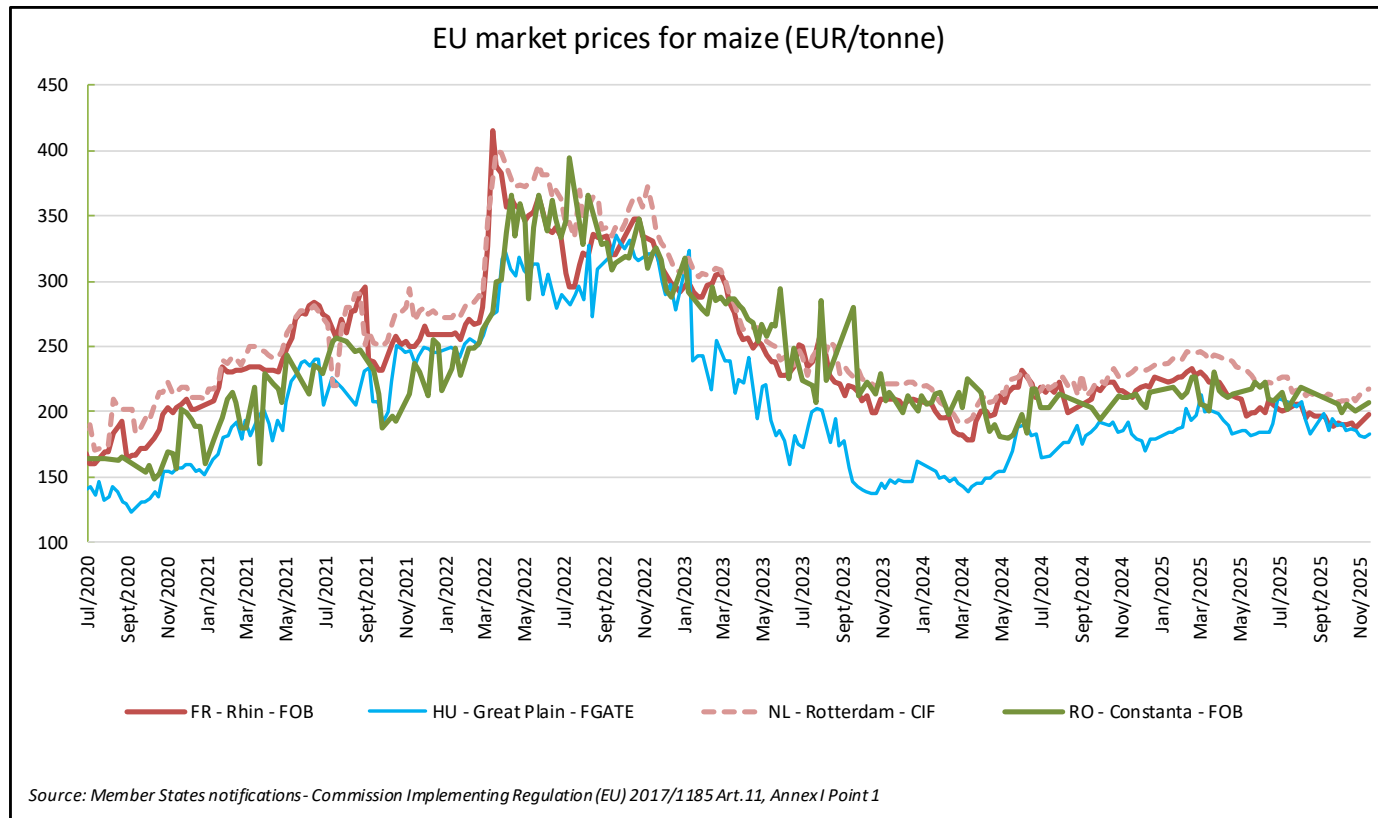
EU market prices for feed barley – (EUR per tonne)



France
(DELPOR Rouen)

• EUR 191 per tonne; 2.3% month-on-month; -2.7% year-on-year

EU market prices for maize – (EUR per tonne)

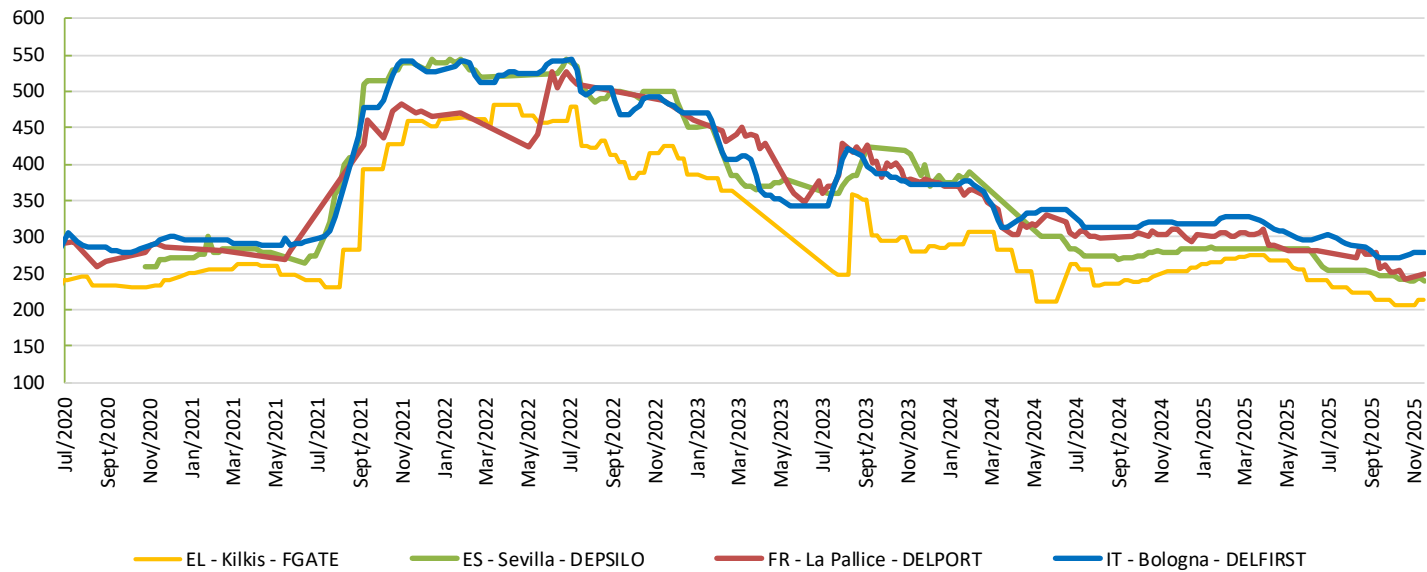


France
(FOB Rhin)

• EUR 198 per tonne; 3.5% month-on-month; -6.0% year-on-year

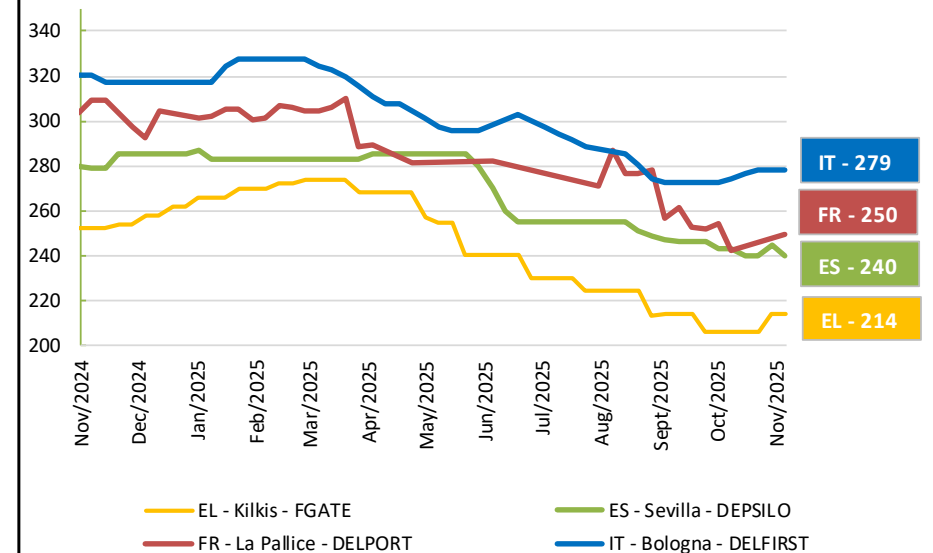
EU market prices for durum wheat – (EUR per tonne)

EU market prices for durum wheat (EUR/tonne)



Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art. 11, Annex I Point 1

EU market prices for durum wheat (EUR/tonne)
evolution since previous year



Source: Member States notifications - Commission Implementing Regulation (EU)

Italy
(DELFIRST Bologna)

• EUR 279 per tonne; 1.5% month-on-month; -13.1% year-on-year

Last month evolution of EU cereal prices

- Compared to last month, cereal prices generally held steady (from -1.6% for feed wheat to +3.5% for maize).
- Compared to last year, representative prices remain lower (from -2.7% for feed barley to -16.0% for milling wheat).

Thank you

The United Kingdom is no longer a Member State of the European Union, however where it is deemed relevant (e.g. for comparison purposes) an EU+UK aggregate are still displayed



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