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Report Highlights:

Dry and warm conditions across the EU, combined with a decline in corn plantings, are anticipated to reduce the bloc's total grain production in MY 2022/23. Nevertheless, EU exports of grains are expected to remain stable and partially replace Black Sea Region origins in international grain markets. EU grain importing Member States will expand their purchases in alternative grain suppliers to make up for the limited access to Ukrainian grain and the shorter domestic availability. Tight livestock producers' margins and consumer price increases are expected to result in a reduction in feed and FSI uses of grains. Given these factors, the EU is anticipated to finish with tight grain ending stocks in MY 2022/23.

Disclaimer: This report presents an updated outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the Marketing Year (MY) 2022/23. 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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Abbreviations used in this report

ASF	African Swine Fever
Benelux	Belgium, the Netherlands, and Luxemburg
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
HPAI	Highly Pathogenic Avian Influenza
HRI	Hotels, Restaurants, and Institutions
IPAD	International Production Assessment Division
FSI	Food, Seed, and Industrial
MMT	Million Metric Tons
MRL	Maximum Residue Limits
MS	EU Member State(s)
MT	Metric Ton (1000 kg)
MY	Marketing Year. July to June fall 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

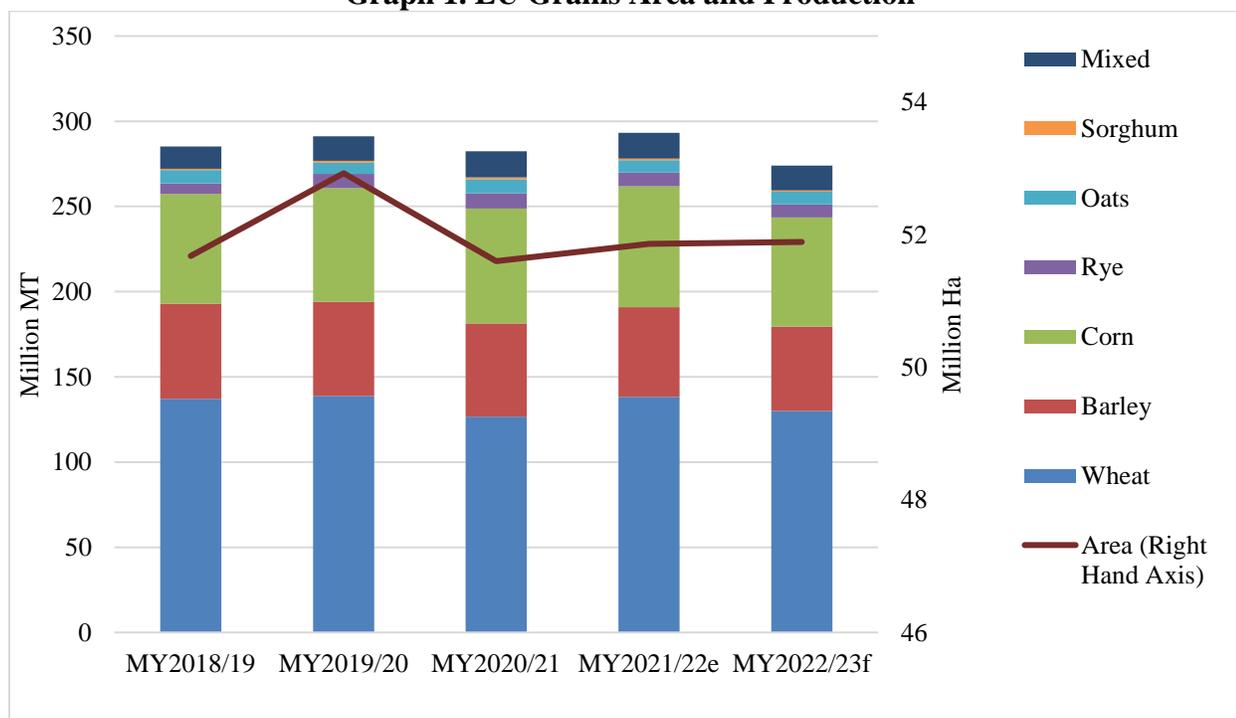
Executive Summary

Table 1. Production, Supply and Distribution - Total Grains

Total Grains ¹	2020/2021		2021/2022		2022/2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	51,732	51,597	52,028	51,905	51,805	51,747
Beginning Stocks (1000 MT)	27,267	27,267	25,335	26,889	30,115	31,030
Production (1000 MT)	282,048	282,339	292,493	293,182	283,865	273,835
MY Imports (1000 MT)	21,246	21,259	21,960	21,143	22,685	22,784
TY Imports (1000 MT)	21,199	21,282	21,930	21,230	22,685	22,794
TY Imp. from U.S. (1000 MT)	671	674				
Total Supply (1000 MT)	330,561	330,865	339,788	341,214	336,665	327,649
MY Exports (1000 MT)	41,188	41,195	42,660	45,835	47,270	45,676
TY Exports (1000 MT)	42,292	42,303	42,659	45,375	47,270	45,676
Feed and Residual (1000 MT)	162,390	160,209	164,190	161,255	159,550	153,459
FSI Consumption (1000 MT)	101,648	102,572	102,823	103,094	103,633	103,217
Total Consumption (1000 MT)	264,038	262,781	267,013	264,349	263,183	256,676
Ending Stocks (1000 MT)	25,335	26,889	30,115	31,030	26,212	25,297
Total Distribution (1000 MT)	330,561	330,865	339,788	341,214	336,665	327,649

Source: FAS EU Posts.

Graph 1. EU Grains Area and Production



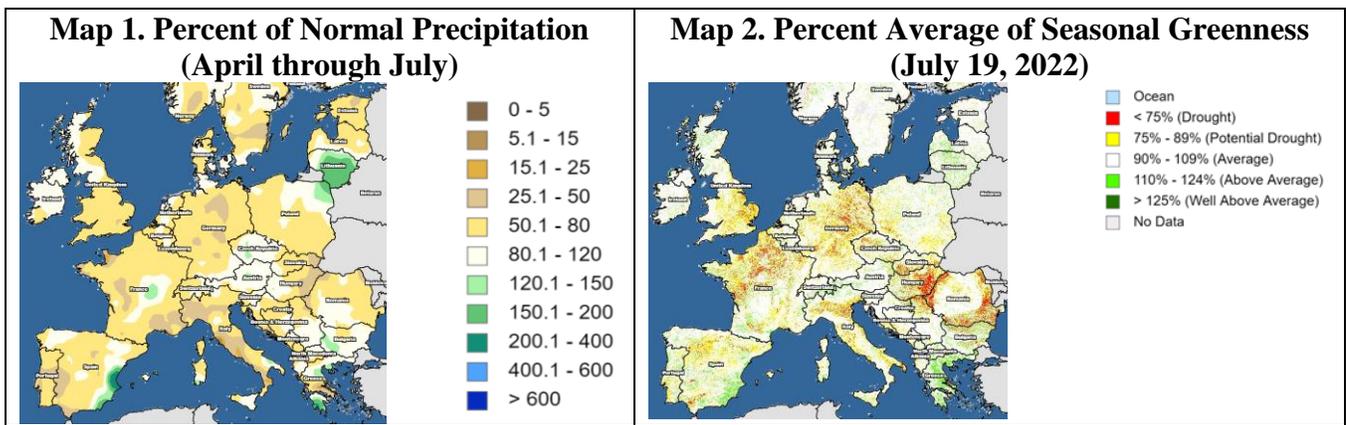
Source: FAS EU Posts.

The EU total grain¹ planted area in MY 2022/23 is revised down compared to previous estimates. The derogation granted in March by the EU Commission as a result of Russia's invasion of Ukraine that allows production of any crop in land laying fallow has altered farmers' spring planting decisions. Lower fertilization and irrigation requirements have resulted in an increase in areas planted to protein

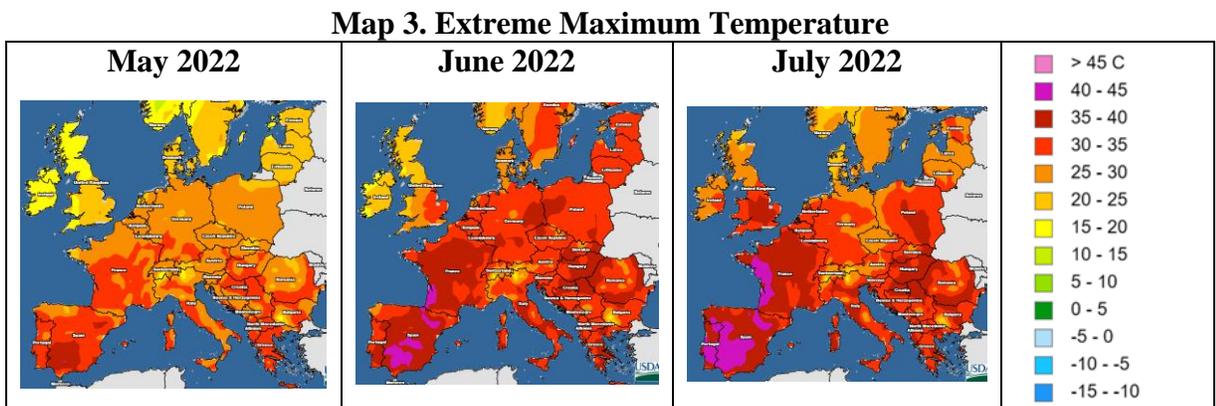
¹ "Total grains" is the sum of wheat, barley, corn, rye, sorghum, oats, and mixed grains.

crops and oilseed crops, such as sunflower, at the expense of spring grains, such as corn. The larger area planted to barley in MY 2022/23 does not compensate for reductions in wheat area, in both cases most prominently in France, and the lower corn plantings projected (Poland, Bulgaria, [Spain](#), Slovakia, and Czech Republic) (See Graph 1).

MY 2022/23 EU total grain production is forecast at 273.8 MMT, down from the 293.1 MMT estimated for the previous marketing year. Grain production reductions are reported in all grains, with only oat production projected above previous season’s levels. Grain production has been revised down from the previous marketing year in main EU grain producing countries such as France, Poland, Romania, [Spain](#), Italy, Hungary, and Bulgaria. Germany constitutes the exception to the rule as it is the only large grain producing Member State that reports a larger total grain output in MY 2022/23.



Source: IPAD/GMA/ FAS/USDA



Source: IPAD/GMA/ FAS/USDA

Following a good start of the grain growing season, subsoil water reservoirs in Germany were replenished over winter with the notable exception of Saxony-Anhalt area in Eastern Germany. The combination of limited precipitation in spring and early summer and the heat waves in July throughout Germany is expected to curb the rebound in yields as it hampers the kernel filling. Likewise, in Austria good grain crop expectations are being reported, with protein content and specific weight in wheat anticipated to improve compared to the previous season.

In the Benelux Countries (Belgium, the Netherlands, and Luxemburg), despite a dry start of the growing season in March-April, sufficient rain fell to replenish soil moisture and crops are generally in good

condition. In the Nordics (Sweden, Denmark, and Finland) a recovery in winter grain production in MY 2022/23 (mostly oats) is anticipated. Similarly, in Croatia and Greece, although spring started off dry, ample precipitation levels in May and June favored winter grains filling, allowing for average yields to be achieved.

Conversely, the extremely dry weather prevailing in France since the beginning of 2022 has taken its toll on winter and spring crops, with yields below average. Crops planted in superficial soils were especially impacted, while crops planted in deeper soils better coped with the low moisture conditions. Heatwaves in mid-June also contributed to a smaller than anticipated winter grain yields and to lower specific weights.

In [Spain](#) and Portugal, the initially good crop prospects following April's abundant rains were negated by the above average temperatures registered in May and June. The acceleration of crop maturity stages, and the resulting reduced grain specific weight, deteriorated yielding potential in these two countries. The lower than anticipated corn plantings in [Spain](#) is also behind the overall grain production decline.

Dry and warm weather in Bulgaria has accelerated crop development, with a larger portion of harvest completed in July than in previous years. Weather conditions from April through June were generally good for the winter grains as moderate temperatures prevailed. However, the limited rainfall, especially in western and southern Bulgaria, was not sufficient and both the surface and subsurface moisture reserves deteriorated. Poor soil moisture conditions, late plantings, and reported lower application of fertilizers are anticipated to push winter grains yields down.

Winter grain production in Romania has been revised down in response to dry and warm conditions during the latest stages of plant development, depleting soil moisture. While in the west counties May and June rainfall helped kernel filling, yields are expected to be considerably lower in Romania's eastern grain growing counties due to lack of moisture. Similar conditions apply in Italy, where yields have also been revised down compared to Post's previous estimates.

Dry and warm conditions at the end of the crop cycle have worsened the condition of grain and forage crops in Slovakia, where harvesting operations are being carried out under extremely dry conditions. In the Czech Republic, an average and earlier grain crop is projected. The vegetative development of grains progresses at a satisfactory pace, despite the dry conditions prevailing and hail episodes in grain producing areas such as Znojmo, Breclav, and Hodonin regions. In the case of Hungary, heatwaves and severe drought are causing significant damage to grain crops, especially in the eastern part of the country. Field crops are in normal condition in the Transdanubian region, but a devastating drought is raging in the Hungarian Great Plain. Based on the poor condition of fields, grain yield potential in Hungary has been revised down.

A slightly lower grain crop is projected in Poland. Yields are forecast to decline driven by the delays in spring grains' plantings, the dry and cold conditions prevailing, combined with lower use of agricultural inputs, such as fertilizers and plant protection products, due to supply shortages in the case of fertilizers and lack of working capital. In the Baltic Countries (Latvia, Lithuania, and Estonia) cold and dry

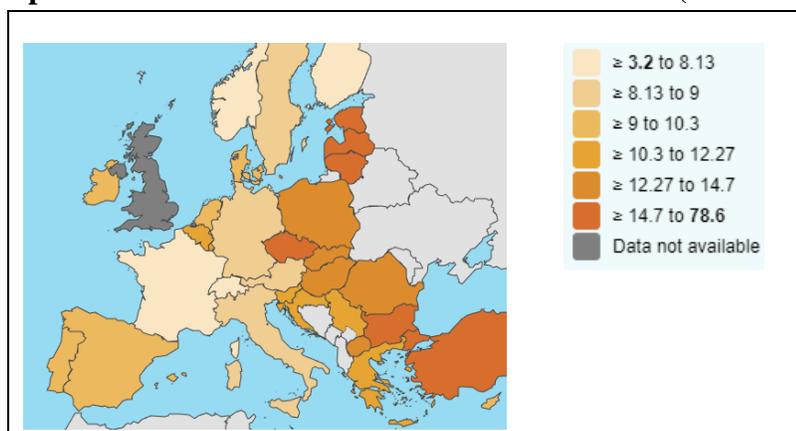
conditions between March and mid-May delayed spring grain plantings and slowed down initial plant development. This was countered by the abundant precipitation and warmer temperatures registered in June. However, these later conditions also raised concerns about pests' incidence affecting yields. Estonian farmers expect significantly higher yields than the previous year. In Latvia, the damage in grain crops caused by recent torrential rains and heavy winds is yet to be assessed.

The EU's total grain consumption for MY 2022/23 is currently projected at 256.7 MMT, down from the 264.3 MMT estimated for MY 2021/22.

Post anticipates a five percent reduction of feed grain demand as animal inventories are expected to decline across the EU in MY 2022/23, potentially releasing more grain for export purposes. Eroding livestock producers' margins, driven by increased feed ingredients and energy costs, animal health issues affecting animal populations² in the EU (Highly Pathogenic Avian Influenza (HPAI) and African Swine Fever (ASF) outbreaks), and logistic difficulties (freight costs and container availability) when exporting livestock products to third countries' markets are the main drivers for the feed grain demand reduction. Despite the shorter domestic crop, in MY 2022/23, corn is anticipated to remain the preferred grain for feed purposes.

In MY 2022/23, total Food, Seed, and Industrial (FSI) grain use in the EU is expected to remain stable. Inflation-driven (Map 4) reduced consumer purchasing power can contribute to build preference for grain-based diets. Likewise, the EU's food grains demand is favored by the recovery of social interactions, Hotels, Restaurants, and Institutions (HRI) activity, and tourism. Grain uses in bioethanol³ production in the EU is projected to remain strong. With the lifting of the pandemic-related movement restrictions, bioethanol consumption and production is picking up.

Map 4. EU Harmonized Index of Consumer Prices (June data)



Source: Eurostat. June data.

² Additional information regarding feed demand trends is available in the most recent [EU Livestock](#) and [Poultry GAIN](#) reports.

³ Additional information regarding EU's Bioethanol Sector is available in the latest [EU Biofuels Report](#) and in the latest [Biofuel Mandates in the EU by Member State](#).

EU grain deficient Member States, namely [Spain](#), the Benelux Countries, Italy, and Portugal, are relatively more dependent on corn imports from third countries. These EU Members States will rely strongly on [Brazil's safrinha](#) corn during the summer months. EU net grain exporting Member States and United States new crop corn suppliers are expected to temper the negative effect of the likely limited access to Ukrainian corn in the fourth quarter of CY2022. Industry sources relate the relatively [lower grain prices](#) in eastern EU Member States (namely Poland and Romania) to the influx of grain from Ukraine, which remains in the region until it can be exported to countries in need.

Despite the shorter crop, EU total grain exports are anticipated to remain stable. Competitive prices of EU grains, reduced competition by Ukrainian origin, combined with Euro-Dollar parity and non-Eurozone⁴ currencies devaluation against the Dollar, support increased grain exports to countries in the Middle East and North Africa.

The lower-than-average MY 2022/23 EU grain crop, combined with the steady pace of EU grain exports, is anticipated to result in tight EU total grain ending stocks.

Section I. Wheat

Table 2. Production, Supply and Distribution - Wheat

Wheat	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
Market Year Begins						
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	22,975	22,970	24,232	24,240	24,100	24,180
Beginning Stocks (1000 MT)	13,110	13,110	10,693	11,460	14,361	14,350
Production (1000 MT)	126,694	126,680	138,418	138,280	134,100	130,000
MY Imports (1000 MT)	5,379	5,390	4,500	4,200	5,500	5,000
TY Imports (1000 MT)	5,379	5,390	4,500	4,200	5,500	5,000
TY Imp. from U.S. (1000 MT)	657	657				
Total Supply (1000 MT)	145,183	145,180	153,611	153,940	153,961	149,350
MY Exports (1000 MT)	29,740	29,741	29,500	32,000	35,500	34,400
TY Exports (1000 MT)	29,740	29,741	29,500	32,000	35,500	34,400
Feed and Residual (1000 MT)	42,500	40,739	46,500	44,170	43,500	40,350
FSI Consumption (1000 MT)	62,250	63,240	63,250	63,420	64,000	63,700
Total Consumption (1000 MT)	104,750	103,979	109,750	107,590	107,500	104,050
Ending Stocks (1000 MT)	10,693	11,460	14,361	14,350	10,961	10,900
Total Distribution (1000 MT)	145,183	145,180	153,611	153,940	153,961	149,350
Yield (MT/HA)	5.5144	5.515	5.7122	5.7046	5.5643	5.3763

(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 2022/2023 = July 2022 - June 2023

Source: FAS EU Posts.

The EU wheat area for MY 2022/23 has slightly increased compared to previous estimates due to higher than previously anticipated plantings in Austria, Bulgaria, Czech Republic, Germany, Slovakia, and [Spain](#), more than offsetting the lower areas reported in France, Denmark, and Hungary. However, unfavorable weather throughout the growing season, namely a lack of rainfall and excessive heat across

⁴ Non-Eurozone EU Member States include Poland, Romania, Bulgaria, Hungary, Czech Republic, Croatia, Denmark, and Sweden.

Europe since the beginning of 2022, will take a toll on the final EU wheat production, which is now estimated at 130 MMT.

The leading EU wheat producing countries (France, Germany, Poland, Romania, Bulgaria, Hungary, and [Spain](#)) are expecting lower than previously forecasted yields. The drop in yield was significant in light soils while crops grown on deeper soils where plants were able to capture underground moisture more efficiently fared much better. Excessive temperatures in June 2022 had an impact on kernel filling, especially in some parts of France, Germany, and [Spain](#), which could lead to lower specific weights crops. The wheat harvest started up to three weeks earlier in most EU wheat producing countries.

Imports are foreseen to increase in MY 2022/23 fueled by Italian demand. EU wheat imports were revised up in MY 2021/22 due to higher than anticipated imports of [UK](#) wheat in Ireland, [Spain](#), and the Netherlands, and Russian and [Serbian](#) wheat in Greece and Italy, but still lower than in MY 2020/21, when large durum extra-EU imports by Italy were recorded to compensate for the poor domestic crop.

Despite a smaller crop, EU wheat exports in MY 2022/23 may benefit from the lower competition from Ukraine origin, the financial restrictions that could impact Russian wheat exports and the Euro-Dollar exchange rate favoring EU wheat in international markets. French, Polish, Latvian, and Lithuanian wheat exports are especially expected to expand.

MY 2021/22 EU wheat exports were reduced from previous forecasts as the impact of high wheat prices in demand was not previously anticipated. EU wheat exports remained higher than in MY 2020/21, driven by large exports from France but also from Romania and Bulgaria which were price competitive on North African markets.

MY 2022/23 wheat feed uses in the EU are projected to drop, driven largely by the declines anticipated in [Spain](#) and France. With lower uses and despite lower crop and exports, wheat stocks are expected to decline in MY 2022/23, indicating a balanced market.

Section II. Coarse Grains⁵

Corn

Table 3. Production, Supply and Distribution - Corn

Corn	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	9,213	9,240	9,211	9,230	9,065	9,000
Beginning Stocks (1000 MT)	7,382	7,382	7,880	8,438	8,679	9,488
Production (1000 MT)	67,140	67,450	70,499	71,000	68,000	64,000
MY Imports (1000 MT)	14,493	14,496	16,000	15,500	16,000	16,300
TY Imports (1000 MT)	14,493	14,496	16,000	15,500	16,000	16,300
TY Imp. from U.S. (1000 MT)	3	6				
Total Supply (1000 MT)	89,015	89,328	94,379	94,938	92,679	89,788
MY Exports (1000 MT)	3,735	3,740	5,600	6,000	4,700	4,200
TY Exports (1000 MT)	3,735	3,740	5,600	6,000	4,700	4,200
Feed and Residual (1000 MT)	57,000	56,800	59,500	58,700	58,800	57,000
FSI Consumption (1000 MT)	20,400	20,350	20,600	20,750	20,600	20,550
Total Consumption (1000 MT)	77,400	77,150	80,100	79,450	79,400	77,550
Ending Stocks (1000 MT)	7,880	8,438	8,679	9,488	8,579	8,038
Total Distribution (1000 MT)	89,015	89,328	94,379	94,938	92,679	89,788
Yield (MT/HA)	7.2875	7.2998	7.6538	7.6923	7.5014	7.1111

(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 2022/2023 = October 2022 - September 2023

Source: FAS EU Posts.

MY 2022/23 EU corn production is revised down to 64 MMT, ten percent below the previous season, reflecting the reduced planted area and the drought and early summer heat impact on the crop. Over the spring, the rainfall has only partially improved the soil moisture, which was already at a low level due to the drier and warmer than usual winter conditions in certain parts of Europe. The lack of precipitation and extremely high temperatures during the first part of the summer are visible in the corn fields. In Hungary, heatwaves and severe drought are causing damage to agriculture, especially in the eastern part of the country.

In Romania, except for the south-western and central regions, the corn crop is impacted by drought to various extents, more evidently in the eastern part of the country. Besides Romania and Hungary, sharply lower yields are anticipated in France and Poland, while [Spain](#), Bulgaria, Italy, Germany, and Slovakia expect moderate reductions. Prolonged dryness combined with summer heat waves represent a great threat for this stage of development and may curb productivity further.

Under the prospects of a poorer crop, MY 2022/23 imports are revised up. Despite the logistics complexity associated with corn exports, Ukraine is anticipated to remain one of the main EU corn suppliers. Transportation routes by train, road, Danube River, and sea are under a continuous

⁵ 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. Is the total of corn, barley, rye, oats, mixed grains, and sorghum.

optimization process, hence the corn flow is anticipated to smooth further. Besides Ukraine, EU relies on [Brazil](#), the United States, Canada, and to a lesser extent on three other smaller corn producers such as [Serbia](#), Moldova, and [South Africa](#). Due to a reduced crop in Romania, the largest EU corn exporter, exports are forecast to fall by 30 percent in MY 2022/23.

Total corn consumption is predicted to contract by over 2 percent in MY 2022/23, driven mainly by a lower feed demand. Feed uses of corn have deteriorated mainly in Italy, [Spain](#), Poland, Romania, France, Portugal, Greece, Hungary, and Belgium, in line with falling animal inventories and increased operational costs weakening the livestock sector. By contrast, corn feed use is revised up in the Netherlands due to its competitiveness compared to other grains, although below the past season's level. Corn food and industrial utilization is estimated to decrease slightly, in light of the lower than anticipated corn availability.

MY 2021/22 imports are expected to increase by 1 MMT as compared to the previous season. Corn was sourced mainly from Ukraine in the first half of the current season. After the ports' closure in response to Russia's invasion of Ukraine, Romania and Poland have become the major exit gates for the Ukrainian corn. Important world corn producers, such as the [United States](#), [Brazil](#), and Canada contributed to alleviating the negative impact of Russia's invasion of Ukraine on the EU corn market. In the fourth quarter of the season, it is expected that corn will be mainly sourced from [Brazil](#), which has an ample domestic supply.

Ending stocks are forecast to rise in the current season based on the accelerated import pace from South America towards the end of the season and tighten in MY 2022/23 due to a lower domestic crop and regional supply.

Barley

Table 4. Production, Supply and Distribution - Barley

Barley	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	11,043	11,022	10,344	10,310	10,550	10,522
Beginning Stocks (1000 MT)	5,207	5,207	5,002	5,056	5,374	5,333
Production (1000 MT)	54,324	54,678	51,972	52,632	50,900	49,500
MY Imports (1000 MT)	1,220	1,220	900	995	1,000	1,200
TY Imports (1000 MT)	1,150	1,150	900	1,050	1,000	1,200
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	60,751	61,105	57,874	58,683	57,274	56,033
MY Exports (1000 MT)	7,399	7,399	7,200	7,500	6,800	6,800
TY Exports (1000 MT)	8,558	8,558	7,200	7,000	6,800	6,800
Feed and Residual (1000 MT)	35,800	36,200	32,700	33,200	32,500	31,500
FSI Consumption (1000 MT)	12,550	12,450	12,600	12,650	12,700	12,700
Total Consumption (1000 MT)	48,350	48,650	45,300	45,850	45,200	44,200
Ending Stocks (1000 MT)	5,002	5,056	5,374	5,333	5,274	5,033
Total Distribution (1000 MT)	60,751	61,105	57,874	58,683	57,274	56,033
Yield (MT/HA)	4.9193	4.9608	5.0244	5.1049	4.8246	4.7044

(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 2022/2023 = October 2022 - September 2023

Source: FAS EU Posts.

As previously anticipated, EU barley area for MY 2022/23 is estimated at 10.5 million HA. Conversely, EU's barley production has been revised down significantly to 49.5 MMT. Excessively hot temperatures and dry weather have negatively impacted production, hindering grain fill and lowering yields in southern EU Member States such as [Spain](#), France, and Italy. Central Europe was also hit by high temperatures and a severe water deficit is raging in the Hungarian Great Plain and Slovakia. By contrast, better climatic conditions led to improved outlooks in Germany, Nordic, and Baltic Countries, as barley filling was completed in these countries before the July heat wave.

Feed barley consumption in MY 2022/23 is significantly revised down to 31.5 MMT, given the reduced supply and availability, and expectation of a sharp fall in the animal sector's demand. Barley use is forecast to be stagnant or increasing in most of the EU countries, with the notable exception of [Spain](#), which is projected to keep the EU's barley feed consumption on a negative trend. On a positive note, as the brewing industry returns to pre-pandemic production levels, a slight increase is anticipated in barley FSI uses in MY 2022/23.

Barley imports are revised up to 1.2 MMT for MY 2022/23, expecting imports from the [United Kingdom](#) to rise. At the same time, EU barley exports are still estimated at 6.8 MMT as the exportable supply is limited, and price competitiveness, especially against corn, is eroded on the Chinese and the Middle East markets. Barley ending stocks are revised down and expected to remain tight at 5 MMT.

Rye

Table 5. Production, Supply and Distribution - Rye

Rye	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
Market Year Begins						
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2,080	2,080	1,930	1,900	1,900	1,900
Beginning Stocks (1000 MT)	590	590	735	516	708	670
Production (1000 MT)	8,964	8,970	7,958	7,950	7,750	7,700
MY Imports (1000 MT)	87	86	260	230	80	140
TY Imports (1000 MT)	131	131	230	250	80	140
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	9,641	9,646	8,953	8,696	8,538	8,510
MY Exports (1000 MT)	156	156	145	160	150	150
TY Exports (1000 MT)	95	100	145	180	150	150
Feed and Residual (1000 MT)	5,450	5,460	4,950	4,700	4,700	4,700
FSI Consumption (1000 MT)	3,300	3,514	3,150	3,166	3,200	3,170
Total Consumption (1000 MT)	8,750	8,974	8,100	7,866	7,900	7,870
Ending Stocks (1000 MT)	735	516	708	670	488	490
Total Distribution (1000 MT)	9,641	9,646	8,953	8,696	8,538	8,510
Yield (MT/HA)	4.3096	4.3125	4.1233	4.1842	4.0789	4.0526

(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 2022/2023 = October 2022 - September 2023

Source: FAS EU Posts.

Oats

Table 6. Production, Supply and Distribution - Oats

Oats	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
Market Year Begins						
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2,563	2,460	2,552	2,460	2,450	2,400
Beginning Stocks (1000 MT)	332	332	538	551	471	389
Production (1000 MT)	8,471	8,230	7,643	7,300	7,550	7,400
MY Imports (1000 MT)	49	49	140	118	40	50
TY Imports (1000 MT)	33	33	140	140	40	60
TY Imp. from U.S. (1000 MT)	9	9				
Total Supply (1000 MT)	8,852	8,611	8,321	7,969	8,061	7,839
MY Exports (1000 MT)	139	140	200	160	110	120
TY Exports (1000 MT)	145	145	200	180	110	120
Feed and Residual (1000 MT)	6,750	6,600	6,200	6,000	6,100	6,000
FSI Consumption (1000 MT)	1,425	1,320	1,450	1,420	1,460	1,410
Total Consumption (1000 MT)	8,175	7,920	7,650	7,420	7,560	7,410
Ending Stocks (1000 MT)	538	551	471	389	391	309
Total Distribution (1000 MT)	8,852	8,611	8,321	7,969	8,061	7,839
Yield (MT/HA)	3.3051	3.3455	2.9949	2.9675	3.0816	3.0833

(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 2022/2023 = October 2022 - September 2023

Source: FAS EU Posts.

Mixed Grains⁶

Table 7. Production, Supply and Distribution – Mixed Grains

Mixed Grain	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	3,645	3,630	3,583	3,600	3,550	3,600
Beginning Stocks (1000 MT)	592	592	450	837	497	772
Production (1000 MT)	15,358	15,320	14,997	15,100	14,550	14,500
MY Imports (1000 MT)						
TY Imports (1000 MT)						
TY Imp. from U.S. (1000 MT)						
Total Supply (1000 MT)	15,950	15,912	15,447	15,937	15,047	15,272
MY Exports (1000 MT)						
TY Exports (1000 MT)						
Feed and Residual (1000 MT)	13,800	13,400	13,200	13,500	12,900	13,100
FSI Consumption (1000 MT)	1,700	1,675	1,750	1,665	1,650	1,665
Total Consumption (1000 MT)	15,500	15,075	14,950	15,165	14,550	14,765
Ending Stocks (1000 MT)	450	837	497	772	497	507
Total Distribution (1000 MT)	15,950	15,912	15,447	15,937	15,047	15,272
Yield (MT/HA)	4.2134	4.2204	4.1856	4.1944	4.0986	4.0278

(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 2022/2023 = October 2022 - September 2023

Source: FAS EU Posts.

Sorghum

Table 8. Production, Supply and Distribution – Sorghum

Sorghum	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	213	195	176	165	190	145
Beginning Stocks (1000 MT)	54	54	37	31	25	28
Production (1000 MT)	1,097	1,011	1,006	920	1,015	735
MY Imports (1000 MT)	18	18	160	100	65	94
TY Imports (1000 MT)	13	82	160	90	65	94
TY Imp. from U.S. (1000 MT)	2	2	0	0	0	0
Total Supply (1000 MT)	1,169	1,083	1,203	1,051	1,105	857
MY Exports (1000 MT)	19	19	15	15	10	6
TY Exports (1000 MT)	19	19	14	15	10	6
Feed and Residual (1000 MT)	1,090	1,010	1,140	985	1,050	809
FSI Consumption (1000 MT)	23	23	23	23	23	22
Total Consumption (1000 MT)	1,113	1,033	1,163	1,008	1,073	831
Ending Stocks (1000 MT)	37	31	25	28	22	20
Total Distribution (1000 MT)	1,169	1,083	1,203	1,051	1,105	857
Yield (MT/HA)	5.1502	5.1846	5.7159	5.5758	5.3421	5.069

(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 2022/2023 = October 2022 - September 2023

Source: FAS EU Posts.

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.

EU sorghum area and production has been revised down significantly following adjustments by the French Ministry of Agriculture due a previous over-estimation, and reduced area and crop expectations in Italy, the EU's larger sorghum producing Member State. Russia's invasion of Ukraine has significantly impacted EU's grain trade flows, creating a volatile situation forcing EU importers to seek alternative origins. U.S. sorghum imports to the EU have contributed to cushion the negative impacts of the constraints affecting supplies in Ukraine in spring 2022. To date, 86,900 MT of U.S. sorghum imports to [Spain](#) have been reported.

Section III. Rice

Table 9. Production, Supply and Distribution – Rice

Rice, Milled Market Year Begins European Union	2020/2021		2021/2022		2022/2023	
	Sep 2020		Sep 2021		Sep 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	419	419	403	403	357	357
Beginning Stocks (1000 MT)	899	899	662	664	689	708
Milled Production (1000 MT)	1,825	1,826	1,717	1,714	1,461	1,348
Rough Production (1000 MT)	2,821	2,824	2,636	2,633	2,270	2,106
Milling Rate (.9999) (1000 MT)	6,469	6,466	6,514	6,510	6,437	6,401
MY Imports (1000 MT)	1,783	1,784	2,200	2,200	2,400	2,400
TY Imports (1000 MT)	1,861	1,862	2,400	2,400	2,400	2,400
TY Imp. from U.S. (1000 MT)	23	23				
Total Supply (1000 MT)	4,507	4,509	4,579	4,578	4,550	4,456
MY Exports (1000 MT)	445	445	440	420	420	400
TY Exports (1000 MT)	413	413	440	420	420	400
Consumption and Residual (1000 MT)	3,400	3,400	3,450	3,450	3,450	3,455
Ending Stocks (1000 MT)	662	664	689	708	680	601
Total Distribution (1000 MT)	4,507	4,509	4,579	4,578	4,550	4,456
Yield (Rough) (MT/HA)	6.7327	6.7399	6.5409	6.5335	6.3585	5.8992

(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 2022/2023 = January 2023 - December 2023

Source: FAS EU Posts.

In MY 2022/23, EU rice planted area is projected to decline to 357 thousand Ha due to low irrigation water availability in Spain (Guadalquivir River basin) and, to a lesser extent, in Greece and Portugal. Moreover, the drought in Italy, coupled with farmers switching to more profitable crops like soy and corn, will likely contribute to the decline. EU rice production is forecast to decrease to 1.3 million MT in MY 2022/23, mainly due to lower yields in Italy and reduced planted area in Spain.

Section IV. Policy⁷

On July 22, 2022, Ukraine and Russia signed an agreement that would allow the resumption of grain exports from the Ukrainian Black Sea ports of Odessa, Chornomorsk, and Yuzhny to Istanbul and then

⁷ For additional information on EU Policy affecting grains, please consult the [Grain and Feed Annual 2022](#) EU GAIN Report.

made available to ports beyond. The exact amounts, timing, and logistics of the sales of grains are still unknown.

In July 2022, the European Commission also proposed a temporary short-term derogation from EU rules on crop rotation and maintenance of non-productive features on arable land. The final impact of such measures will depend on the choices made by Member States and farmers. However, the Commission estimates that this measure will put back 1.5 million hectares into production.

Related Reports

Title	Date
Spanish Grain Supply Chain Shows Resilience in Challenging Times	06/24/2022
EU - Grain and Feed Annual 2022	04/26/2022

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Attachments:

No Attachments.