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### **Report Highlights:**

EU grain production in MY 2024/25 is expected to decline from last year's levels due to a combination of smaller area planted to grains and lower yields affecting all grains except for barley and oats. Imports in MY 2024/25 are projected down considering the ample domestic supplies in net-importing Member States. Likewise, exports are expected to decline as crop projections deteriorate in export-oriented Member States. EU grain consumption is forecasted to grow only in response to a slightly higher demand for both feed and Food, Seed and Industrial (FSI) uses. Lower ending stocks reflect the tight market situation anticipated, particularly for EU wheat.

**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**

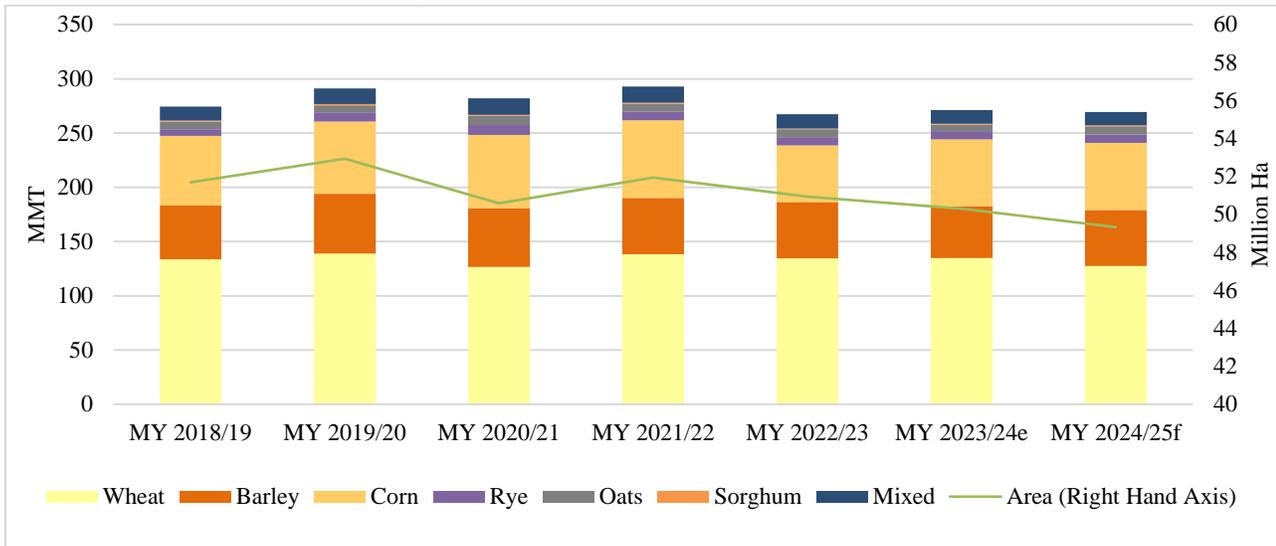
Total Grains <sup>1</sup>	2022/2023		2023/2024		2024/2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	50,978	50,966	50,170	50,314	49,905	49,337
Beginning Stocks (1000 MT)	32,436	32,436	31,839	31,894	29,025	32,375
Production (1000 MT)	267,249	267,460	270,114	271,239	275,690	267,390
MY Imports (1000 MT)	37,679	37,677	35,195	34,845	29,490	29,270
TY Imports (1000 MT)	37,833	37,824	35,145	34,625	29,550	29,240
TY Imp. from U.S. (1000 MT)	556	444	-	-	-	-
Total Supply (1000 MT)	337,364	337,573	337,148	337,978	334,205	329,035
MY Exports (1000 MT)	46,183	46,184	48,450	48,160	45,770	41,795
TY Exports (1000 MT)	46,134	46,138	48,320	48,040	45,770	41,805
Feed and Residual (1000 MT)	157,080	158,803	155,550	156,177	157,885	156,975
FSI Consumption (1000 MT)	102,262	100,692	104,123	101,266	104,640	101,658
Total Consumption (1000 MT)	259,342	259,495	259,673	257,443	262,525	258,633
Ending Stocks (1000 MT)	31,839	31,894	29,025	32,375	25,910	28,607

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

<b>Total Distribution</b> (1000 MT)	337,364	337,573	337,148	337,978	334,205	329,035
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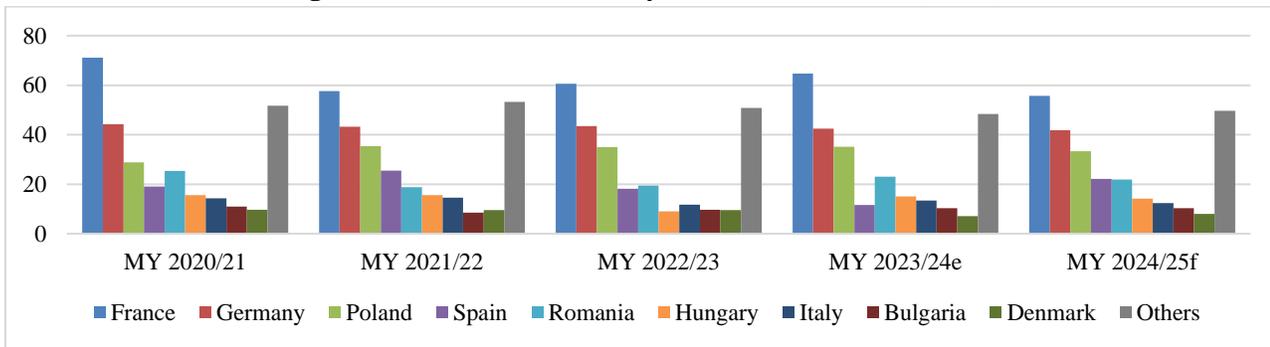
Source: FAS EU Posts.

**Figure 1. EU Grain Area and Production**



Source: FAS EU Posts.

**Figure 2. Grain Production by EU Member States (MMT)**



Source: FAS EU Posts.

European Union (EU) total grain production is expected to marginally decline in MY 2024/25 and amount to 267.4 MMT (million Metric Tons), down from the 271.2 registered in MY 2023/24. The significant recovery anticipated for Spain and the Nordic countries (Denmark, Sweden, and Finland), affecting in particular barley and oats output volumes, does not suffice to counter the productivity declines projected for some of the EU’s largest grain producers, such as France or Germany, which account respectively for 25 and 15 percent of the EU’s total grain production, where excessive moisture pushed yields down. In the case of Hungary and the EU’s southeast grain producers such as Romania and Bulgaria, excessive heat and dryness deteriorated yields compared to Post’s spring forecast for corn.

Area planted to grains in the EU in MY 2024/25 is expected to amount to 49.3 million Hectares (Ha), down from the 50.3 million Ha in MY 2023/24, continuing the downward trend initiated back in MY 2021/22, in some instances in response to Common Agricultural Policy (CAP) mandatory crop diversification, or in others, competition from more profitable tree and other arable crops such as oilseeds or protein crops.

In Spain, an adequate spring precipitation pattern improving soil moisture, combined with mild temperatures prevailing through the crop cycle, resulted in a significant increase from last year's bottom levels to above average winter grain production projections. The only exception is the eastern part of the country, where the production recovery has been more moderate. The improvement in dam water storage has also allowed for spring corn and rice plantings to expand.

Likewise, in Finland, Sweden, and Denmark, grain production is expected to rebound due to a larger area and better yields compared to the previous season. The wet fall in 2023 negatively affected fall plantings which ultimately boosted the sowing of crops such as wheat, barley, and oats in spring 2024.

Since the late fall of 2023, France experienced a very wet weather, which fully replenished underground water reservoirs. However, the excessive precipitation negatively impacted the grain crops from the beginning, by delaying, and in some regions preventing, winter crops sowings. Farmers could not access their waterlogged fields for fertilizers and pesticide treatments. Likewise, excessive moisture in late winter and in spring delayed spring crop planting operations, which in some instances were carried out with up to four weeks of delay. Additional precipitations in June and July caused lodging in many areas, boosting the chances of fungal diseases such as fusariosis. Despite delayed sowing operations, significant late spring and early summer rainfall have the potential to benefit the corn crop, similarly to what occurred in 2023.

A similar situation in Germany saw heavy rains in fall and winter that contributed to a restoration of subsoil water but delayed or prevented winter grain sowing. This was only partially compensated by higher spring grain area. Frequent rains in spring hampered fertilizer and pesticide application operations and increased the risk of fungal diseases. This is expected to curb Germany's total grain production.

In MY 2024/25, plant growth conditions in Poland were highly variable over time and across the country's growing regions. Following an early start of winter grains in the second half of February 2024, plant development was favored by above average temperatures and heavy rainfall improving soil moisture. However, soil moisture also impeded field work operations, including spring plantings of barley, oats, and mixed grains. Severe frosts in May slowed down the growth rate of plants but did not cause major damage in grains, except for local losses. High temperatures combined with heavy rains just before the harvest caused lodging of plants and reduced the initially expected very high grain yields. Conversely, in eastern Poland, where sandy soils prevail, drought negatively impacted rye, mixed grain, oats, and wheat. The combination of significant precipitation levels and warm and sunny early summer conditions favored corn development. MY 2024/25 total grain output is projected below previous season's levels.

In Romania's west and north-western regions, a favorable precipitation regime allowed for good winter grains development. Conversely, crop performance was not that good in the rest of the country. In some areas, fields were affected by thunderstorms and heavy rains, while in others, plants suffered from lack of precipitation. Low temperatures in the spring, which delayed the corn plant development, were followed by above average temperatures in May, which accelerated crop development, leading winter grains harvest to start between two or three weeks earlier than normal. Overall, despite the area expansion, the production is expected to drop because of the yield loss. Quality parameters are reported to be good.

In [Bulgaria](#), the mild winter was followed by an unusually warm period in the first half of April, accelerating the early progress of the crop but in some instances, negatively impacting tilling. However, wetter and cooler-than-average spring conditions then prevailed and improved soil moisture conditions leading to over average winter grain production prospects, except for some areas where rains arrived too late to have a positive impact. Likewise, sufficient rainfall and adequate temperatures allowed for fast progress and an early completion of the spring grains plantings.

In Hungary, where the total heat sum is significantly higher than last year and average levels, winter grains and corn developed between two and three weeks ahead of normal. Precipitation reached the optimum amount by July in the northwestern and northeastern regions but fell short especially in the middle part of the country. Heavy rainfalls increased grain moisture and losses due to lodging and fungal diseases in June. Winter crops were generally in normal conditions before harvest. Although outstanding results are not expected, yields are satisfactory for winter grains. In the case of corn, yield expectations have fallen across a week-long heat wave.

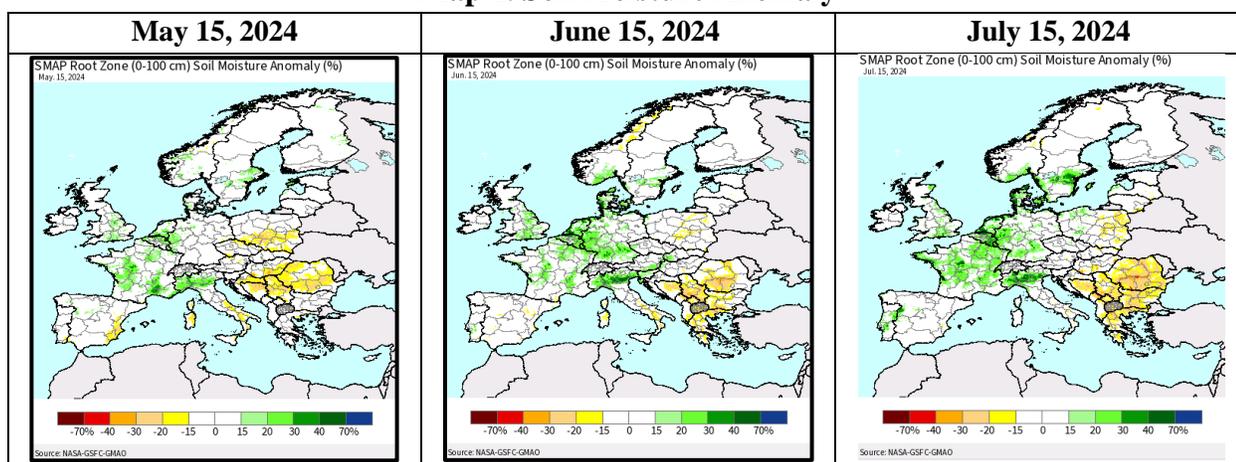
MY 2024/25 has been an atypical year for winter grains in Czechia. The very early onset of spring accelerated the vegetative development of plants by several weeks. The subsequent April frosts damaged grains locally and the colder weather delayed crop development. Ultimately, winter grain harvest in Czechia began this year one week earlier than last year.

Winter grains harvest in Slovakia is projected at average levels, given the unstable weather. Yields have been greatly affected by alternating warm and cooler temperatures, rain, and hail episodes. In some areas, the crop is maturing unevenly due to excessive rainfall from the turn of last year.

In the north of Italy, the spring season of 2024 is the wettest recorded since 1978. The abundant rain negatively affected pollination and caused widespread lodging and the soils remained too wet for proper field management and delayed harvest operations. In addition, the excess humidity might affect the quality of winter crop grains. Likewise, the persistent cloud cover significantly reduced incoming radiation, particularly in the regions of Friuli-Venezia and Giulia. In central Italy (Toscana, Marche, Umbria, Lazio), crops are progressing well under average weather conditions. In the south of the country, the weather has been warmer than usual with only occasional rainfall. Precipitations arrived too late to mitigate the negative impacts of the dry spell that resulted in early senescence of durum wheat in growing regions such as Puglia or Sicily, where significant production losses are anticipated. All in all, with average summer conditions in the next few weeks, winter grains in Italy could still reach average values. Regarding summer crops, the planting of maize was considerably delayed, and initial growth has been slow so far. In certain areas, notably in the northeast, planting is yet to be completed, or replanting is still to occur.

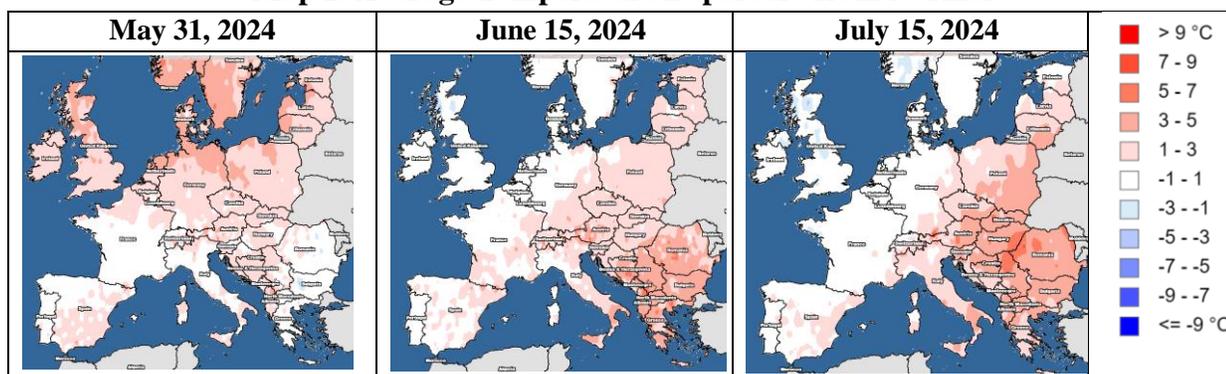
In Croatia, yield and grain quality is satisfactory. Rains in late June delayed winter grains harvest operations but were ultimately beneficial for corn crop condition.

**Map 1. Soil Moisture Anomaly**



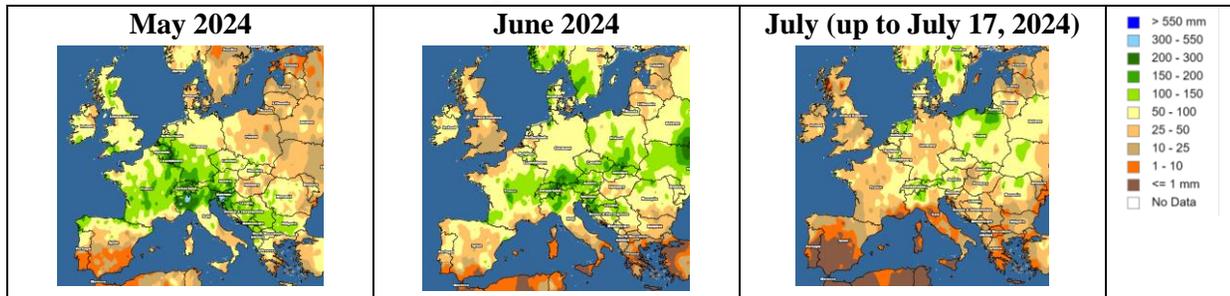
Source: IPAD/GMA/ FAS/USDA.

**Map 2. Average Temperature Departure from Normal**



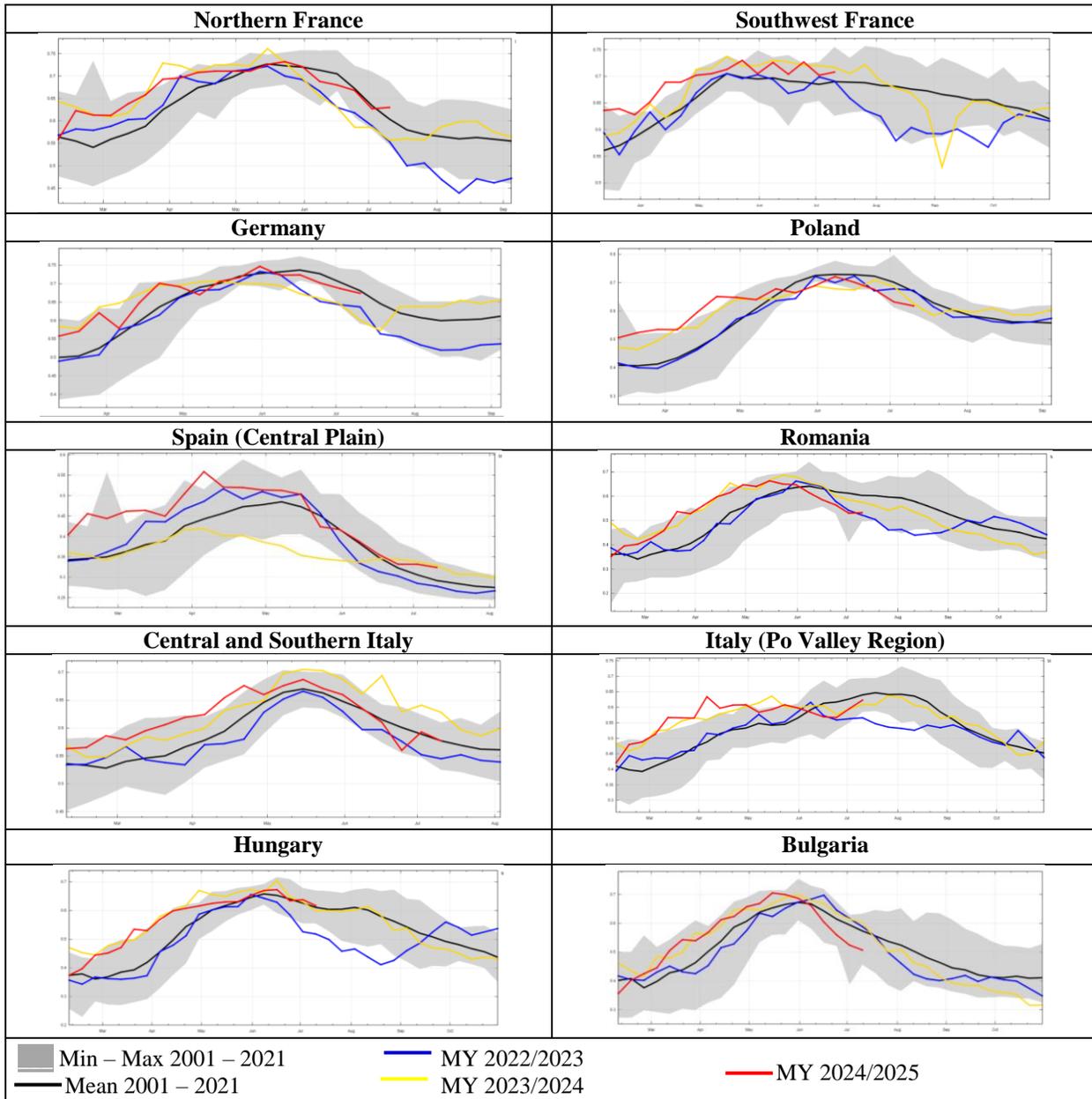
Source: IPAD/GMA/ FAS/USDA.

**Map 3. Total Rainfall (mm)**



Source: IPAD/GMA/ FAS/USDA.

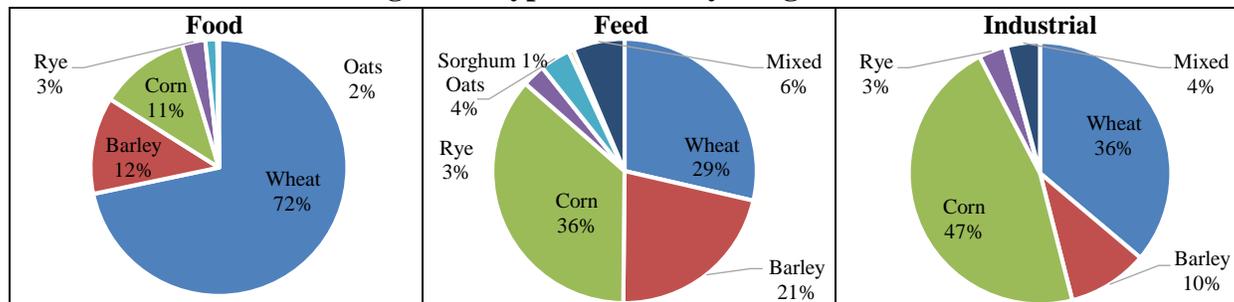
**Figure 3. NDVI in Main Grain Producing Member States**



Source: IPAD/GMA/ FAS/USDA.

The EU grain production is largely dedicated for animal feed, which represents nearly two thirds of total grain consumption in the EU. Food uses account for less than one third of total disappearance, whereas industrial processes (including biofuels<sup>2</sup>) represent just below 10 percent.

**Figure 4. Type of Grain by Usage – MY 2024/25f**



Source: FAS EU Posts.

EU's total feed grains demand is projected to grow only marginally in MY 2024/25 driven by the reactivation of demand, particularly in Spain and the Nordic countries, that counters the declines projected for EU Member States such as France, Italy, the Netherlands, and Germany. While the above listed EU Member States are benefiting from positive margins in poultry and swine production operations, the later face animal herd reduction driven by the negative impact of animal diseases or strict environmental rules in place.

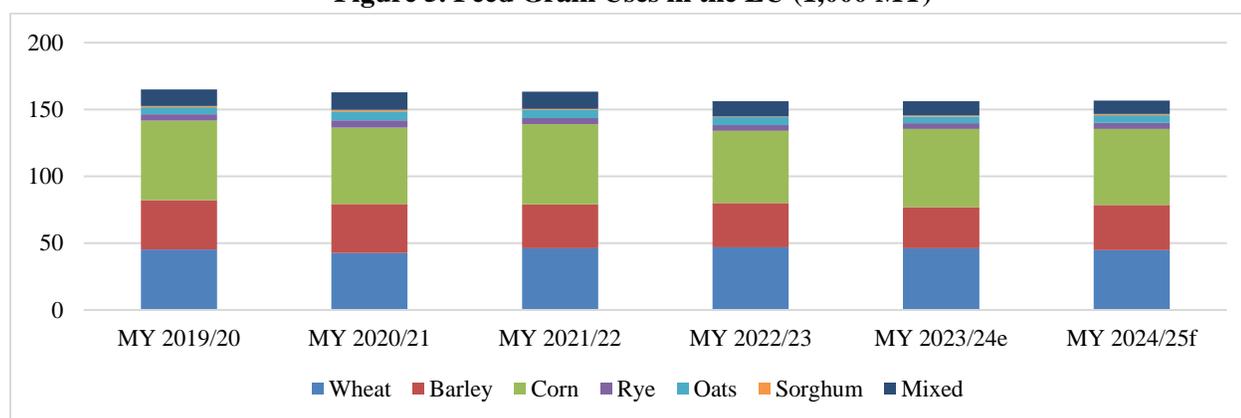
Feed corn remains the preferred grain used for feed purposes in MY 2024/25, accounting for over one third of the feed grains consumption. However, the projected return to average of the EU's barley and oats production, after the crop failure registered in Spain and the Nordic countries in MY 2023/24, has contributed to boost these grains' consumption in MY 2024/25. The shorter wheat crop anticipated for MY 2024/25 will prevent a repeat of the large wheat rate use in feed registered in MY 2023/24, when ample supplies were readily available in the EU and main trading partners. On a positive note, wheat is not subject to the EU-Ukraine agreement setting a cap on imports,<sup>3</sup> which could ultimately improve its competitiveness against corn in feed.

Despite the somewhat shorter EU grain crop anticipated, [feed grain prices](#) remain at competitive levels as world supplies are projected to be ample.

<sup>2</sup> 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](#).

<sup>3</sup> For additional information, please consult the [Policy Section](#) with in this report.

**Figure 5. Feed Grain Uses in the EU (1,000 MT)**



Source: FAS EU Posts.

Food, Seed and Industrial (FSI) are expected to grow in MY 2024/25 but at a lower rate than anticipated in Post's previous estimate, as lower domestic availabilities reduced the quantity of grains devoted to industrial purposes in Germany, Poland, and Hungary. A modest increase is anticipated in a context of moderate economic growth,<sup>4</sup> declining inflation, and the flourishing tourism activity boosting consumption in the Hotels, Restaurants, and Institutions (HRI) channel. Similarly, demand for starch and its side- and by-products (such as maltodextrin, glucose, ethanol, DDGS, CGF, gluten) in the EU remains strong, which along with the steady bioethanol production levels, contributes to the increase.

Overall grain exports in MY 2024/25 are to decline compared to MY 2023/24, as production is anticipated to decline in the main grain export-oriented EU Member States such as France, Romania, Poland, and Germany.

In MY 2024/25, the EU's total grain imports are expected to decline compared to MY 2023/24 considering the increased domestic availability in main importing countries. In MY 2023/24, Spain alone accounted for over 40 percent of the total bloc's imports, followed by Italy (over 15 percent), the Netherlands (nearly 10 percent) and Portugal (over 5 percent). While EU water routes (the Danube River and its branch, the Sulina Channel) were the primary mode of transport of Ukrainian grains through Romania following Russia's termination of [the United Nations' Black Sea Grain Initiative \(BSGI\)](#) in mid-July 2023, since Fall 2023, deepwater ports in the Odessa region were opened. Consequently, grain exports out of Ukraine to EU destinations (primarily Spain, but also Italy, the Netherlands, and Portugal) have been deviated to the more competitive sea routes.

Grain ending stocks in are expected to decline in MY 2024/25, for all grains except for oats and sorghum. The reduction is particularly significant in the case of wheat, reflecting the tight market situation for this grain following the unusually high ending stocks at the end of MY 2023/24.

<sup>4</sup> For additional economic trends information, consult the latest [EU Economic Forecast](#).

## Section I. Wheat

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

Wheat	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)	24,402	24,420	24,200	24,300	23,350	23,110
Beginning Stocks (1000 MT)	13,631	13,631	16,038	15,750	14,688	17,600
Production (1000 MT)	134,293	134,450	134,150	134,900	130,000	127,450
MY Imports (1000 MT)	12,193	12,193	12,500	12,500	10,000	8,600
TY Imports (1000 MT)	12,193	12,193	12,500	12,500	10,000	8,600
TY Imp. from U.S. (1000 MT)	381	257	-	-	-	-
Total Supply (1000 MT)	160,117	160,274	162,688	163,150	154,688	153,650
MY Exports (1000 MT)	35,079	35,083	37,000	36,700	34,500	31,600
TY Exports (1000 MT)	35,079	35,083	37,000	36,700	34,500	31,600
Feed and Residual (1000 MT)	45,000	46,901	46,500	46,230	44,500	44,550
FSI Consumption (1000 MT)	64,000	62,540	64,500	62,620	64,750	62,650
Total Consumption (1000 MT)	109,000	109,441	111,000	108,850	109,250	107,200
Ending Stocks (1000 MT)	16,038	15,750	14,688	17,600	10,938	14,850
Total Distribution (1000 MT)	160,117	160,274	162,688	163,150	154,688	153,650
Yield (MT/HA)	5.5034	5.5057	5.5434	5.5514	5.5675	5.5149

(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.

Overall, EU wheat crop in MY 2024/25 is expected to decline to 127.4 MMT, driven by a sharply reduced French wheat crop, and lower German, Hungarian, Polish, and Romanian crops not being offset by a higher Spanish crop. The EU wheat area for MY 2024/25 has been slightly adjusted downward from previous estimates due to lower than previously anticipated plantings in Bulgaria, Czech Republic, Denmark, France, Hungary, and Italy, not being offset by higher areas in Germany, Poland, and Romania.

Weather conditions throughout the wheat growing season varied considerably between countries. Bulgaria benefited from adequate rainfall throughout the winter and spring leading to optimal growing conditions. In Romania, wheat was negatively impacted by higher-than-average temperatures in the spring leading to harvest operations being carried out between two and three weeks ahead. Similar conditions prevailed in Hungary, where the rainfall throughout spring boosted crop lodging and fungal diseases but also advanced the wheat harvest. The Polish wheat crop benefited from good growing conditions until early summer. However, weather conditions worsened just before harvest with heavy rains, and excessive heat ultimately is likely to take a toll on the final yields.

While in Northern Italy, spring 2024 was the wettest since 2018, affecting pollination and delaying the harvest, Southern Italy suffered from lasting dryness that caused early senescence of durum wheat (e.g. in Puglia). In Sicily, the loss of durum wheat is expected to be considerable.

In Germany, the difficult planting conditions due to heavy rains led to a reduction in wheat area but were followed by a generally good germination and early plant development, and absence of winter kill. Precipitation over the winter was higher than in the previous years and water levels have been restored even in the subsoils all over Germany. The excessive precipitation, in some regions resulting in flooding and impeding field operations, has resulted in shorter overall wheat crop, with large heterogeneity in yields and quality across the country.

France experienced a very wet winter grains growing season. While the abundant precipitation contributed to replenish underground water reservoirs, they negatively impacted production. Initially, it delayed and, in some regions, even prevented winter crops sowings. Later, it impeded farmers accessing their waterlogged fields for fertilization and pesticide applications. Further rain in June and July caused lodging in many areas, boosting fungal diseases such as fusariosis. The fertility of the ears was also impacted by the limited sunlight due to excessive cloud cover, similarly to 2016, albeit to a much lower extent. All those conditions may severely impact the MY 2024/25 French wheat crop in terms of yield, which is currently projected 13 percent down from MY 2023/24 levels, and quality, particularly regarding protein content.

Early spring precipitations contributed to improve soil moisture in Spain. Spanish farmers adequately fertilized their fields, driven by the improved affordability of fertilizers and the promising precipitations. Mild temperatures prevailing until the end of the crop cycle also contributed to secure a sizeable crop. The Spanish wheat crop is expected to double from its MY 2023/24 level, when a severe drought slashed yields.

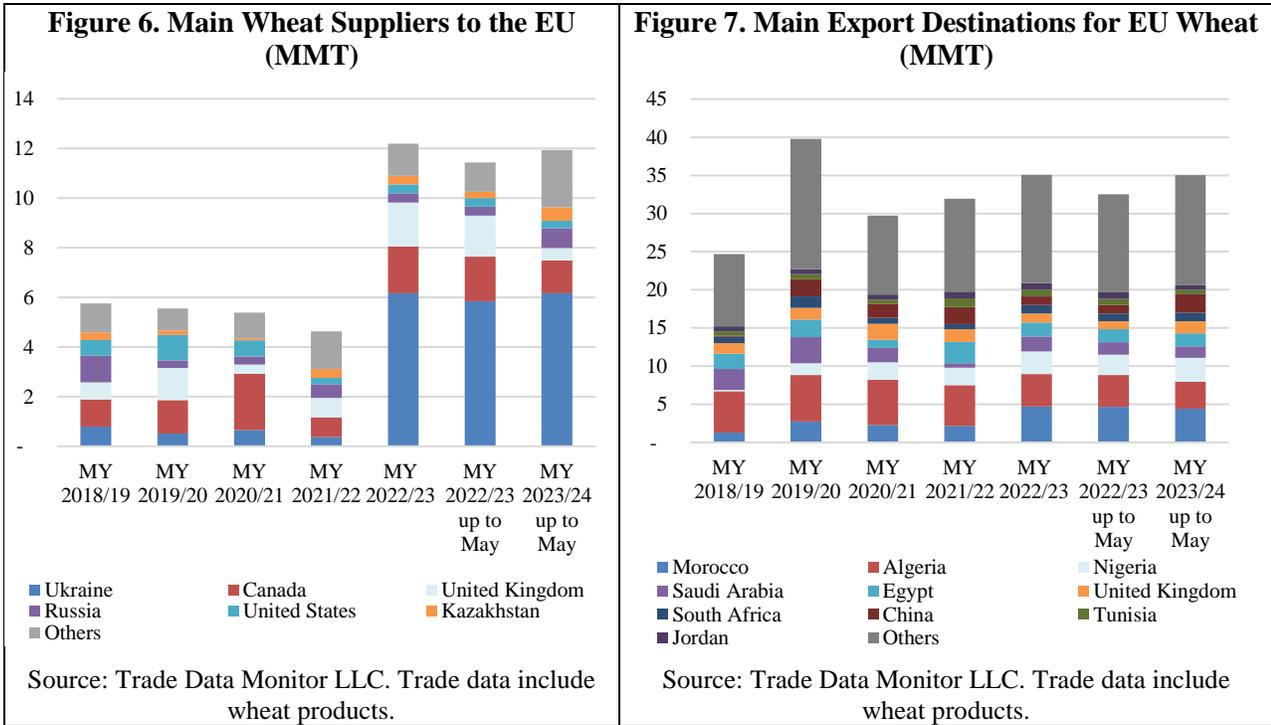
Wheat imports are foreseen to decrease in MY 2024/25 in response to the significant recovery in Spain's domestic wheat availability and slightly lower Italian durum wheat demand. Note that wheat is not involved in the EU-Ukraine agreement limiting Ukrainian agricultural exports to the EU.<sup>5</sup> In MY 2023/24, EU wheat imports have been revised up slightly due to higher than anticipated imports of Canadian and Ukrainian wheat shipments into Italy.

EU wheat exports in MY 2024/25 are anticipated to decline in line with shorter crop projected, with French wheat losing competitiveness against Russian and Ukrainian wheat in Egypt and North African markets. MY 2023/24 EU wheat export estimates have been revised up from previous forecasts due to higher exports from Germany, Poland, Latvia, Lithuania, Romania and Bulgaria stemming from its increased price competitiveness in the second half of the MY.

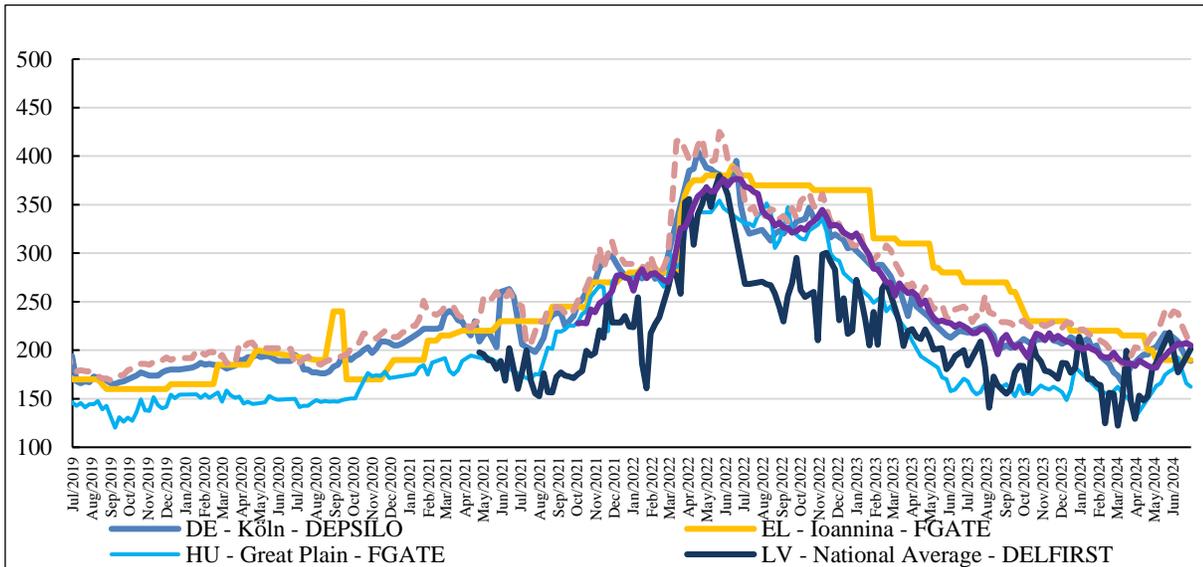
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<sup>5</sup> For additional information, please consult the [Policy Section](#) with in this report.

MY 2024/25 wheat feed uses in the EU are projected to decline, due to a lower crop and higher competition with more available domestic barley. With a lower supply, wheat stocks are expected to significantly decline in MY 2024/25, indicating a tight market.

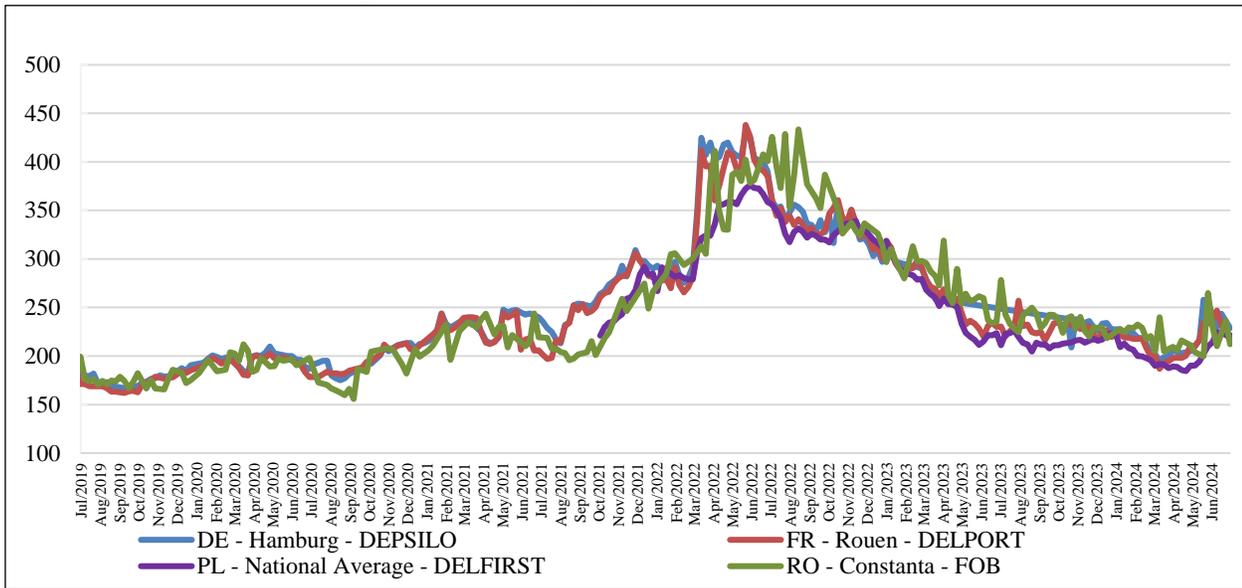


**Figure 8. EU Feed Wheat Prices (Euros/MT)**



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

**Figure 9. EU Milling Wheat Prices (Euros/MT)**



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

## Section II. Coarse Grains<sup>6</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	Oct 2022		Oct 2023		Oct 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8,845	8,839	8,280	8,230	8,650	8,580
Beginning Stocks (1000 MT)	11,508	11,508	7,690	8,037	7,590	7,527
Production (1000 MT)	52,292	52,330	61,000	61,500	64,000	59,800
MY Imports (1000 MT)	23,189	23,187	20,500	20,000	18,000	19,000
TY Imports (1000 MT)	23,189	23,187	20,500	20,000	18,000	19,000
TY Imp. from U.S. (1000 MT)	174	185	-	-	-	-
Total Supply (1000 MT)	86,989	87,025	89,190	89,537	89,590	86,327
MY Exports (1000 MT)	4,199	4,196	4,400	4,400	4,000	3,300
TY Exports (1000 MT)	4,199	4,196	4,400	4,400	4,000	3,300
Feed and Residual (1000 MT)	55,800	55,600	57,000	57,800	57,700	56,300
FSI Consumption (1000 MT)	19,300	19,192	20,200	19,810	20,400	19,840
Total Consumption (1000 MT)	75,100	74,792	77,200	77,610	78,100	76,140
Ending Stocks (1000 MT)	7,690	8,037	7,590	7,527	7,490	6,887
Total Distribution (1000 MT)	86,989	87,025	89,190	89,537	89,590	86,327
Yield (MT/HA)	5.9120	5.9204	7.3671	7.4727	7.3988	6.9697

(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>6</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. Is the total of corn, barley, rye, oats, mixed grains, and sorghum.

Due to adverse weather factors in key-stages of plant development, EU corn production for MY 2024/25 has worsened compared to previous Post estimates and is currently projected to amount to 59.8 MMT, below the previous year output. The improved outlooks foreseen for Germany, Spain, and France could not compensate for production cuts in Romania, Poland, Italy, Bulgaria, Hungary and Czechia. Furthermore, the mid-July aggressive and long heat waves occurring in the south-eastern Member States have the potential to lead to a further dip in the corn production estimate. Area planted to corn has been marginally revised down in line with the projected reductions compared to Post's spring estimates in Romania, Poland, and Italy, which could not be offset by the area expansion reported in France, Germany, Hungary, Spain, and to a lesser extent, in Bulgaria and Croatia.

Planting conditions varied across the EU. Farmers in the EU northern and central countries delayed corn plantings due to wetness, while southern regions benefited from good planting conditions and good emergence. Lower-than-average temperatures slowed down the plant growth process across the EU in the beginning development stages.

The cold weather was followed by warm weather, which fastened the growth process. Fields in the center and west of the EU continued to receive abundant rainfall the first months of the summer, contrasting with the south and east areas, where extremely high temperatures and no significant rainfall for an extended period significantly depleted the soil moisture and reduced the crop capacity to perform.

In Romania, insufficient precipitation combined with above-average temperatures limited the height of the plants. Summer heat and dryness, especially during the crucial stages of plant development, prompted a significant downward revision in the crop estimate. In Bulgaria, corn initially enjoyed a very good development promising a high yield potential. However, summer heat and drought during the most critical period of July had a negative impact on yields. Corn crops in the above countries have become increasingly dependent on irrigation infrastructure, because of a lower snow cover in the winter, a deficient moisture level in the spring, and more frequent and longer-lasting summer droughts.

The situation is more positive in the central and western Europe. In Hungary, corn area is estimated larger than previously expected, because some farmers increased the planned corn area in the spring by replacing winter crops in weak condition. Production is expected to decline despite the moderate increase in area, given the lower yields anticipated.

In France, planting was between 2 and 4 weeks late, with a good plant growth due to plenty of moisture, though yields are dependent on the weather situation in August. In Italy, the planting of maize was considerably delayed, and initial growth has been slow. Due to wetness, in certain areas, notably in the northeast, planting is yet to be completed, or replanting is still to occur.

A corn crop rebound is projected in Spain due to both larger area and improved yields, supported by a significantly improved rainfall regime this year which replenished the water reservoirs.

MY 2024/25 imports are revised down amid expectations of a relatively good domestic crop, the lower import needs in Spain, as well as lower availability in the major supplying countries. Ukraine is foreseen to remain the main EU corn supplier, though with a lower volume due to both reduced exportable supplies and the risk of running into an imports cap under the EU safeguard mechanism.<sup>7</sup> According to customs data, on a calendar-year basis, Ukrainian corn imports up to May 2024 amounted to 6.6 MMT, well below the 11.2 MMT triggering threshold.

Brazil, the United States, Canada, and Serbia are predicted to generate a decent exportable supply level, though the July wave may curb the productivity in the latter. MY 2023/24 imports were adjusted below in line with the trade data, which showed a year-on-year 28 percent decrease up to May 2024. Apart from the traditional suppliers to the EU, the United States is increasingly becoming competitive on the European market, particularly in Spain, Portugal, and Italy, according to the [U.S. Export Sales Report](#).

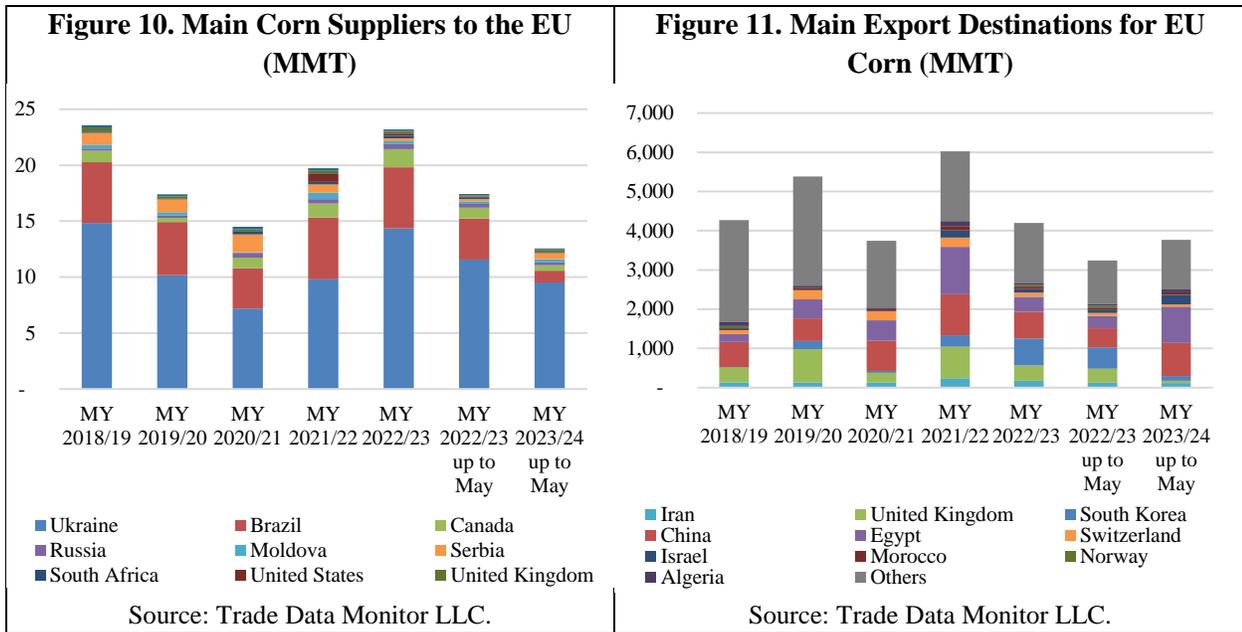
The MY 2024/25 export figure was adjusted down to reflect the lower harvest projection in the leading EU exporters such as Romania and Bulgaria. An upward revision in the export estimate for MY 2023/24 was prompted by the increased exports from Romania, Poland, and Bulgaria in response to demand from Iran, United Kingdom, Turkey, and Morocco.

EU total corn consumption is anticipated to decline in MY 2024/25, driven mainly by large domestic supply from alternative feed grains such as barley and oats. France, Hungary, Germany, Poland, Ireland, Italy and, to a lesser extent, Slovenia, Austria, and Czechia, confirmed earlier expectations for a higher year-on-year corn feed utilization. Conversely, due to a rebound in the winter crops, Spain projects a lower corn utilization, and so do Portugal, the Netherlands, and the Nordics (Denmark, Finland and Sweden). By contrast, industrial corn utilization in MY 2024/25 remains above the previous season's level. However, the demand for starch and by-products in Hungary, Romania, and Bulgaria is limited by the deteriorating crop condition. Bioethanol in Poland supports only a moderate increase in the industrial use of corn. Year-on-year total corn consumption is anticipated to increase in MY 2023/24, primarily due to feed consumption, which is stimulated by good margins in livestock production favored by the domestic corn supply availability and its competitiveness.

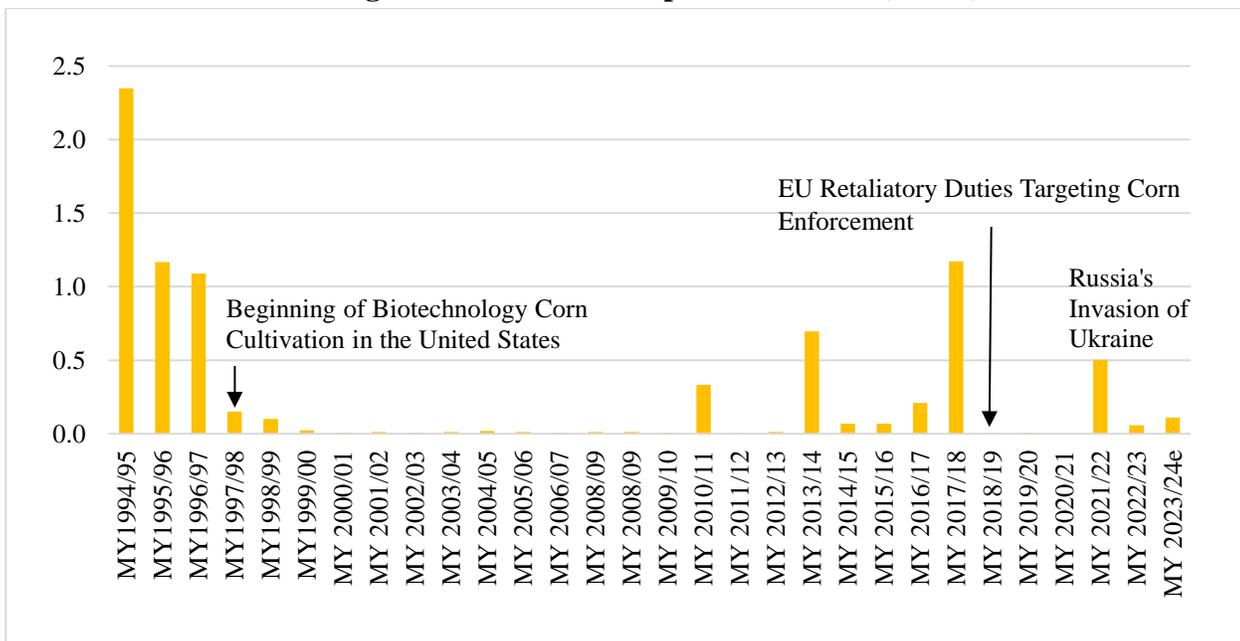
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<sup>7</sup> For additional information on the Safeguard Mechanism, please, consult the [Policy section](#) within this report.

Ending stocks are projected to tighten in MY 2024/25 on account of a poorer domestic harvest and a lower import forecast. Likewise, despite the recovered crop, carryover stocks in MY 2023/24 are predicted lower in response of increased corn consumption.

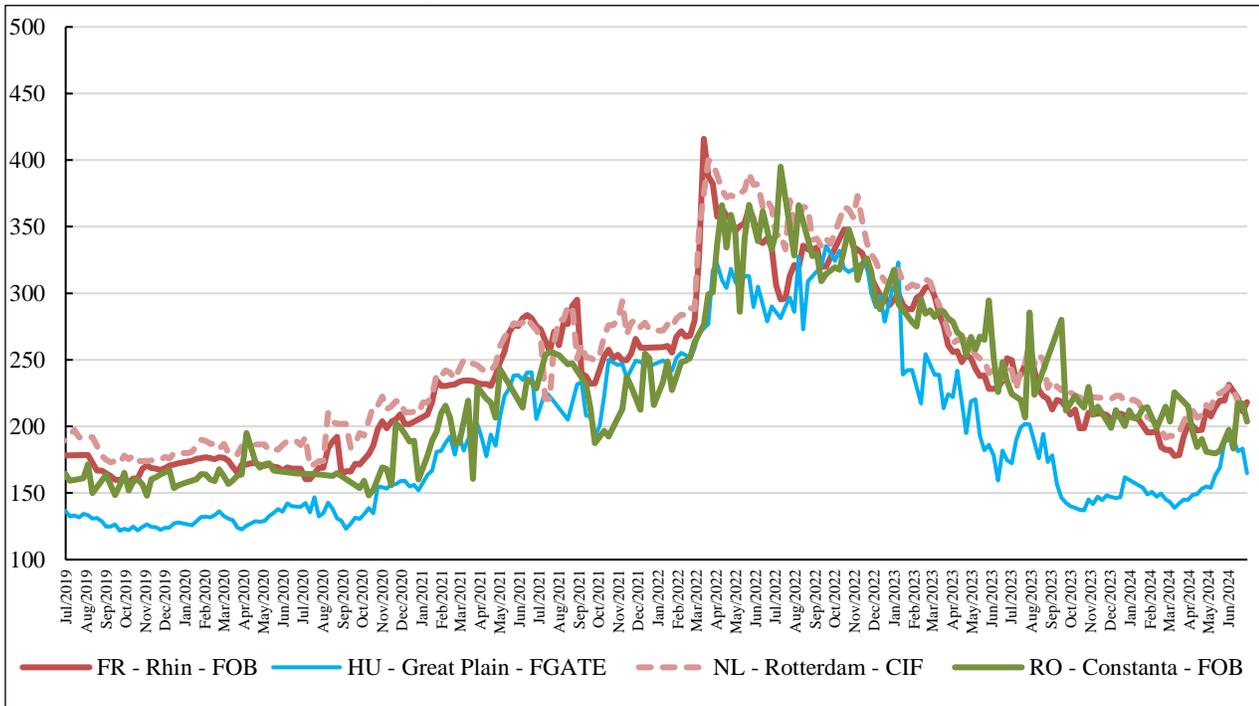


**Figure 12. U.S. Corn Exports to the EU (MMT)<sup>8</sup>**



<sup>8</sup> Corn Marketing Year is October - September.

**Figure 13. EU Corn Prices (Euros/MT)**



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

**Barley**

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

Barley	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Market Year Begins						
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	10,311	10,295	10,300	10,340	10,400	10,300
Beginning Stocks (1000 MT)	5,287	5,287	5,697	5,729	5,047	5,550
Production (1000 MT)	51,800	51,782	47,700	47,741	52,800	51,680
MY Imports (1000 MT)	1,976	1,976	1,850	2,000	1,300	1,450
TY Imports (1000 MT)	2,157	2,157	1,800	1,800	1,300	1,450
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	59,063	59,045	55,247	55,470	59,147	58,680
MY Exports (1000 MT)	6,666	6,666	6,700	6,700	7,000	6,600
TY Exports (1000 MT)	6,614	6,614	6,600	6,600	7,000	6,600
Feed and Residual (1000 MT)	33,800	33,800	30,400	30,670	33,300	33,700
FSI Consumption (1000 MT)	12,900	12,850	13,100	12,550	13,200	12,950
Total Consumption (1000 MT)	46,700	46,650	43,500	43,220	46,500	46,650
Ending Stocks (1000 MT)	5,697	5,729	5,047	5,550	5,647	5,430
Total Distribution (1000 MT)	59,063	59,045	55,247	55,470	59,147	58,680
Yield (MT/HA)	5.0238	5.0298	4.6311	4.6171	5.0769	5.0175

(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: [PSD Online Advanced Query](#)

Source: FAS EU Posts.

EU barley production is forecast to rebound in MY 2024/25 to 51.7 MMT. Initial harvest results are positive particularly in Spain, and production is also recovering in the Nordic countries after the previous year's setback and in Bulgaria, where record high volumes are projected. In Poland, Lithuania and Romania, steady production is projected and it is expected to rebound in Estonia and Latvia.

By contrast, harvest results fell short of expectations in northwest Europe. In Germany, saturated soil and wet conditions hampered field works (fertilizer and pesticide applications) and are projected to lead to flat production and low specific weight for barley. The situation in France is even gloomier, where disappointing winter barley results predicts a significant decline in production. Hungary also anticipates a notable fall in barley supply due to a drop in area. However, Spain's strong harvest is expected to offset all these losses and brings the EU's production back to about the same level of MY 2022/23. EU barley area for MY 2024/25 has been revised down, close to the past two years' levels, and is estimated at 10.3 million Ha. Farmers in the main producer countries (Spain, Germany, Denmark, Poland, and Romania) slightly increased their plantings, except for France. A moderate rebound in corn fields in Hungary also took a toll on barley area, which is also projected down in Italy and the Baltics.

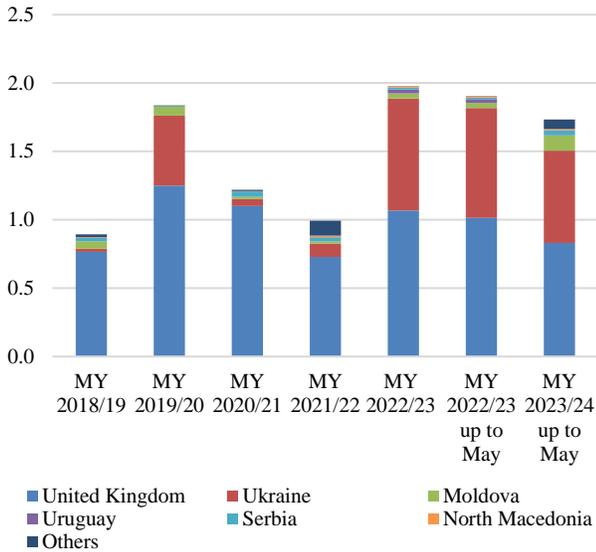
Total barley consumption in MY 2024/25 is anticipated to edge up to 46.6 MMT, driven by a solid demand for feed barley, moderately increasing need for alternative protein sources for feed and food purposes, growth in processing capacities, and a rebound in the malting sector. The industrial use of barley is also set to increase moderately. Demand for feed barley is estimated at 33.7 MMT, recovering from the drop in MY 2023/24. Barley usage in feed has the potential to grow in Spain, Denmark, and Sweden, stemming from the better domestic supply.

EU barley imports are projected to decline to 1.45 MMT in MY 2024/25 – particularly in Spain – as improved supply is foreseen after the serious setback in the previous year. At the same time, Black Sea feed barley is likely to keep its competitive price advantage. The UK and Ukraine will remain the major non-EU suppliers of barley.

Despite the rebounding production in MY 2024/25 and price advantage on the global market, the low level of beginning stocks may cause tight conditions, and the higher domestic demand for barley in feed is anticipated to reduce exportable availabilities. Although EU barley prices have the potential to grow, competition with Russia's crops puts a downward pressure on them. Additionally, demand for barley in China (which is the main export partner) is forecast to decline in MY 2024/25 because of its exceptionally high level of beginning stocks.

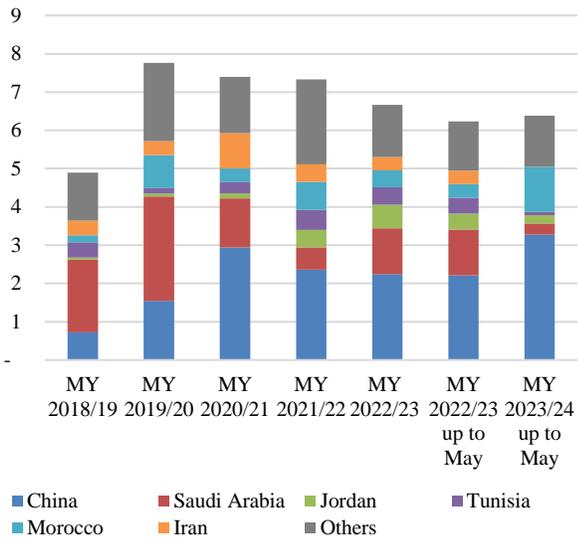
Even with higher production and limited volume of exports, a low level of ending stocks (5.43 MMT) is expected in the EU in MY 2024/25. This is driven by the foreseen increase in feed barley consumption.

**Figure 14. Main Barley Suppliers to the EU (MMT)**



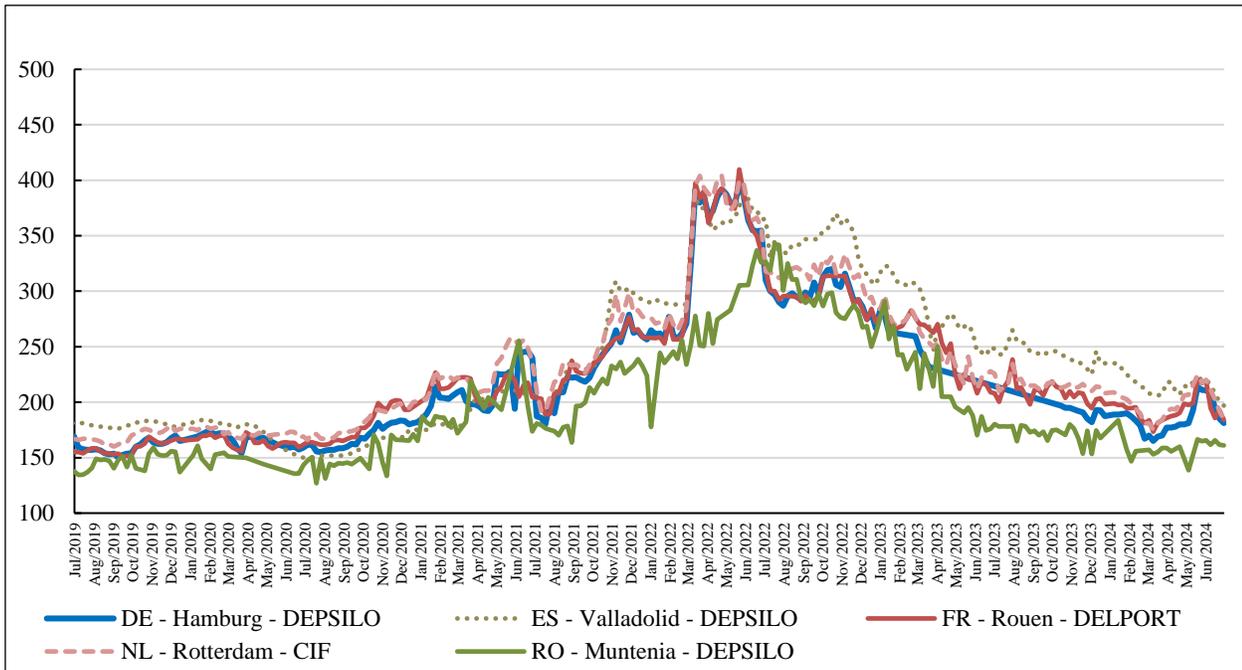
Source: Trade Data Monitor LLC.

**Figure 15. Main Export Destinations for EU Barley (MMT)**



Source: Trade Data Monitor LLC.

**Figure 16. EU Barley Prices (Euros/MT)**



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

## Rye

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

Rye	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)	1,762	1,773	1,860	1,880	1,800	1,800
Beginning Stocks (1000 MT)	888	888	832	837	641	650
Production (1000 MT)	7,526	7,545	7,634	7,633	7,700	7,610
MY Imports (1000 MT)	109	109	200	190	70	70
TY Imports (1000 MT)	131	131	200	200	130	70
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	8,523	8,542	8,666	8,660	8,411	8,330
MY Exports (1000 MT)	141	141	225	250	175	190
TY Exports (1000 MT)	138	138	200	230	175	190
Feed and Residual (1000 MT)	4,700	4,700	4,700	4,700	4,700	4,650
FSI Consumption (1000 MT)	2,850	2,864	3,100	3,060	3,050	3,043
Total Consumption (1000 MT)	7,550	7,564	7,800	7,760	7,750	7,693
Ending Stocks (1000 MT)	832	837	641	650	486	447
Total Distribution (1000 MT)	8,523	8,542	8,666	8,660	8,411	8,330
Yield (MT/HA)	4.2713	4.2555	4.1043	4.0601	4.2778	4.2278

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

Source: FAS EU Posts.

## Oats

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

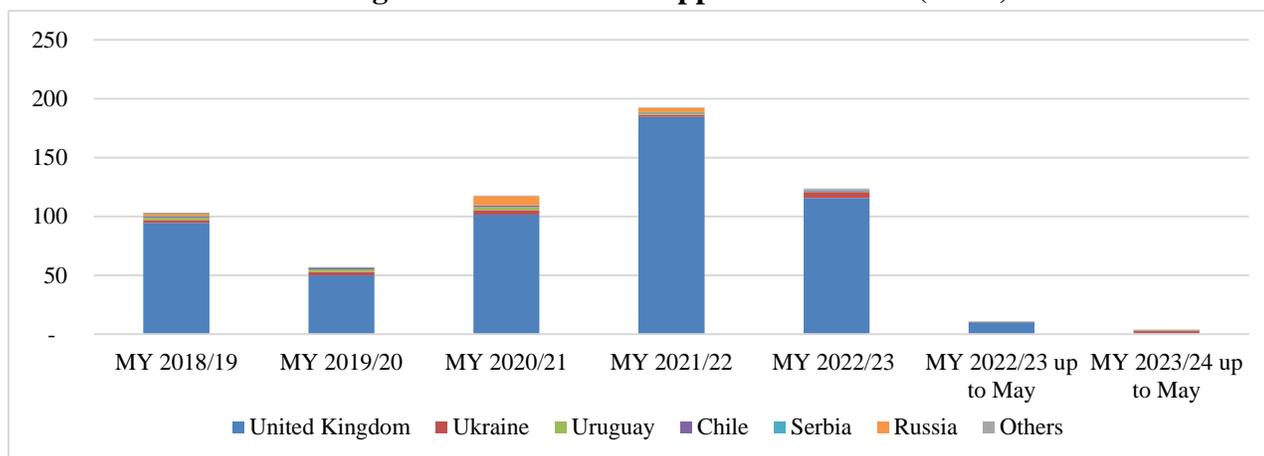
Oats	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	2,349	2,347	2,290	2,300	2,350	2,390
Beginning Stocks (1000 MT)	424	424	605	605	285	280
Production (1000 MT)	7,494	7,509	5,920	5,930	7,100	7,380
MY Imports (1000 MT)	170	170	125	130	100	135
TY Imports (1000 MT)	125	125	125	110	100	110
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	8,088	8,103	6,650	6,665	7,485	7,795
MY Exports (1000 MT)	83	83	115	100	85	85
TY Exports (1000 MT)	90	94	110	100	85	100
Feed and Residual (1000 MT)	5,950	5,950	4,850	4,850	5,600	5,900
FSI Consumption (1000 MT)	1,450	1,465	1,400	1,435	1,425	1,448
Total Consumption (1000 MT)	7,400	7,415	6,250	6,285	7,025	7,348
Ending Stocks (1000 MT)	605	605	285	280	375	362
Total Distribution (1000 MT)	8,088	8,103	6,650	6,665	7,485	7,795
Yield (MT/HA)	3.1903	3.1994	2.5852	2.5783	3.0213	3.0879

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

Source: FAS EU Posts.

On June 19, 2024, the “emergency break” mechanism<sup>9</sup> was activated for oats, as imports reached the triggering threshold of 2,440.56 MT. However, Ukraine only represents a small share of the imports, as the United Kingdom is by far the EU’s oats largest supplier.

**Figure 17. Main Oats Suppliers to the EU (TMT)**



Source: Trade Data Monitor LLC.

## Mixed Grains<sup>10</sup>

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

Mixed Grain	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Harvested (1000 HA)	3,184	3,162	3,085	3,100	3,200	2,940
Beginning Stocks (1000 MT)	680	680	961	920	761	754
Production (1000 MT)	13,331	13,309	12,900	12,710	13,300	12,370
MY Imports (1000 MT)	-	-	-	-	-	-
TY Imports (1000 MT)	-	-	-	-	-	-
TY Imp. from U.S. (1000 MT)	-	-	-	-	-	-
Total Supply (1000 MT)	14,011	13,989	13,861	13,630	14,061	13,124
MY Exports (1000 MT)	-	-	-	-	-	-
TY Exports (1000 MT)	-	-	-	-	-	-
Feed and Residual (1000 MT)	11,300	11,300	11,300	11,100	11,300	10,800
FSI Consumption (1000 MT)	1,750	1,769	1,800	1,776	1,800	1,712
Total Consumption (1000 MT)	13,050	13,069	13,100	12,876	13,100	12,512
Ending Stocks (1000 MT)	961	920	761	754	961	612
Total Distribution (1000 MT)	14,011	13,989	13,861	13,630	14,061	13,124
Yield (MT/HA)	4.1869	4.209	4.1815	4.1	4.1563	4.2075

(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.

<sup>9</sup> For additional information, please consult the [Policy Section](#) with in this report.

<sup>10</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.

## 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						
<b>Area Harvested</b> (1000 HA)	125	130	155	164	155	217
<b>Beginning Stocks</b> (1000 MT)	18	18	16	16	13	14
<b>Production</b> (1000 MT)	513	535	810	825	790	1,100
<b>MY Imports</b> (1000 MT)	42	42	20	25	20	15
<b>TY Imports</b> (1000 MT)	38	31	20	15	20	10
<b>TY Imp. from U.S.</b> (1000 MT)	1	2	0	0	0	0
<b>Total Supply</b> (1000 MT)	573	595	846	866	823	1,129
<b>MY Exports</b> (1000 MT)	15	15	10	10	10	20
<b>TY Exports</b> (1000 MT)	14	13	10	10	10	15
<b>Feed and Residual</b> (1000 MT)	530	552	800	827	785	1,075
<b>FSI Consumption</b> (1000 MT)	12	12	23	15	15	15
<b>Total Consumption</b> (1000 MT)	542	564	823	842	800	1,090
<b>Ending Stocks</b> (1000 MT)	16	16	13	14	13	19
<b>Total Distribution</b> (1000 MT)	573	595	846	866	823	1,129
<b>Yield</b> (MT/HA)	4.104	4.1154	5.2258	5.0305	5.0968	5.0691
(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: <a href="#">PSD Online Advanced Query</a>						

Source: FAS EU Posts.

EU sorghum area and production for MY 2024/25 has been revised up compared to MY 2023/24 and previous estimates. The upwards correction can be virtually entirely attributed to larger area planted in France, as farmers opted to increase the area of sorghum as it is more drought-tolerant but has lesser yields than corn. Sorghum is used in on-farm feed for monogastric livestock such as pigs and is a good element within the crop rotation from an agronomical point of view and for crop-diversification compliance under the EU's Common Agricultural Policy requirements.

## Section III. Rice

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

Rice, Milled	2022/2023		2023/2024		2024/2025	
	Sep 2022		Sep 2023		Sep 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
European Union						
Area Harvested (1000 HA)	329	329	356	347	395	389
Beginning Stocks (1000 MT)	905	905	811	874	681	815
Milled Production (1000 MT)	1,287	1,287	1,380	1,346	1,716	1,529
Rough Production (1000 MT)	2,010	2,132	2,155	2,228	2,680	2,553
Milling Rate (.9999) (1000 MT)	6,404	6,037	6,404	6,041	6,404	5,989
MY Imports (1000 MT)	2,308	2,308	2,100	2,150	2,200	2,100
TY Imports (1000 MT)	2,170	2,170	2,200	2,150	2,200	2,100
TY Imp. from U.S. (1000 MT)	17	17	-	-	-	-
Total Supply (1000 MT)	4,500	4,500	4,291	4,370	4,597	4,444
MY Exports (1000 MT)	389	401	360	365	400	385
TY Exports (1000 MT)	365	379	360	365	400	385
Consumption and Residual (1000 MT)	3,300	3,225	3,250	3,190	3,350	3,230
Ending Stocks (1000 MT)	811	874	681	815	847	829
Total Distribution (1000 MT)	4,500	4,500	4,291	4,370	4,597	4,444
Yield (Rough) (MT/HA)	6.1094	6.4802	6.0534	6.4207	6.7848	6.5630

(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.

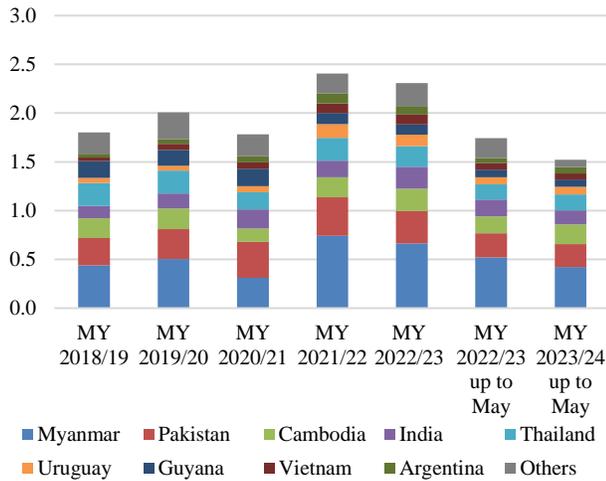
In MY 2024/25, EU rice production<sup>11</sup> is forecast to reach 1.5 MMT, driven by higher output volumes projected in Italy, Spain, Greece, Bulgaria, and Romania, while decreasing in France, and remaining stable in Portugal and Hungary. In MY 2024/25, EU rice planted area is projected to go up to 389 thousand Ha, mainly driven by increases in Italy and Spain, where early spring precipitation improved water reservoirs, allowing for rice area to bounce back close to average levels. Rice planted area is projected to level off in Portugal, Greece, France, Bulgaria, and Romania.

EU rice consumption is anticipated to recover slightly in MY 2024/25 compared to MY 2023/24, driven by the softening of food inflation and a growing demand 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.

The larger domestic availability anticipated for MY 2024/25 is expected to push EU rice import needs slightly down.

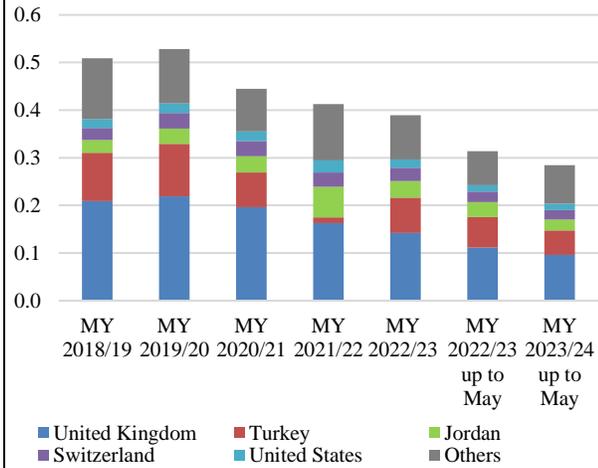
<sup>11</sup> EU rice production is concentrated in seven Member States: Italy, Spain, Greece, Portugal, Bulgaria, France, and Romania.

**Figure 18. Main Rice Suppliers to the EU (MMT)**



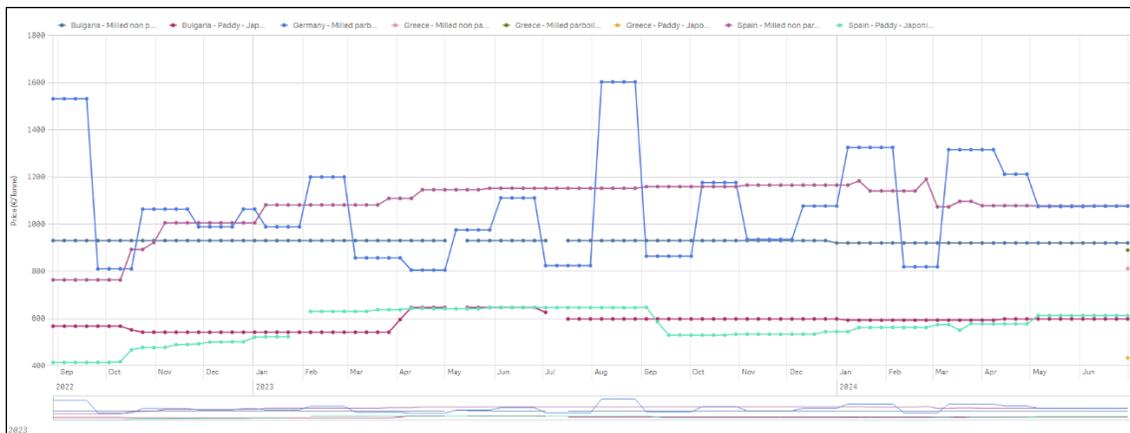
Source: Trade Data Monitor LLC.

**Figure 19. Main Export Destinations for EU Rice (MMT)**



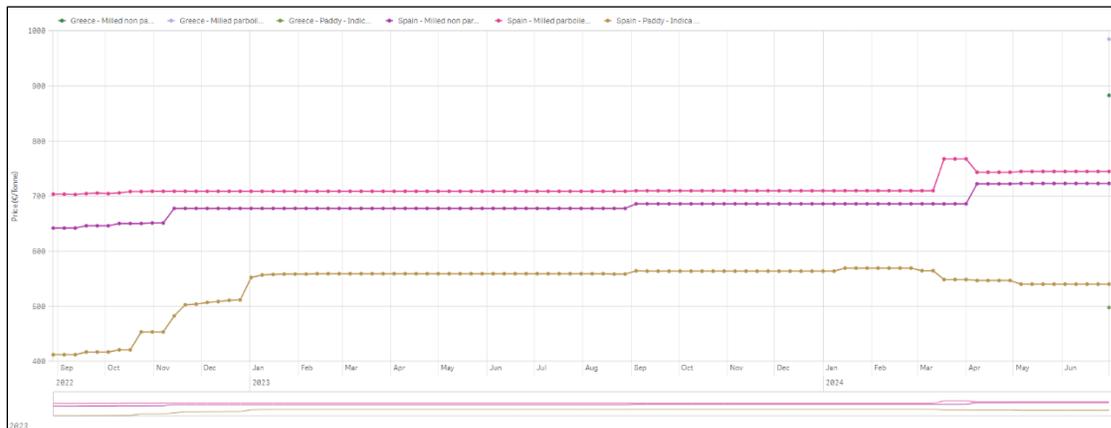
Source: Trade Data Monitor LLC.

**Figure 20. EU Japonica Rice Prices Evolution (Euros/MT)**



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

**Figure 21. EU Indica Rice Prices Evolution (Euros/MT)**



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

## Section IV. Policy<sup>12</sup>

### EU's Policy Response to the War in Ukraine – Tariffs and Quotas

On June 6, 2024, [Regulation \(EU\) 2024/1392](#) entered into force. The Regulation renews autonomous trade measures for Ukraine, which suspends all customs duties and quotas for Ukrainian products entering the EU for one more year. The Regulation also includes a safeguard mechanism which obliges the Commission to reintroduce quotas if imports of poultry, eggs, sugar, oats, corn, groats, and honey exceed the arithmetic mean of quantities imported in the second half of 2021, in CY2022 and in CY2023.

On June 19, 2024, the EU adopted [Regulation \(EU\) 2024/1726](#) which introduces tariff quotas for Ukrainian oats imported into the EU as imports reached the triggering threshold of 2,440.56 MT since the beginning of 2024. The activation of the automatic safeguard measure for oat imports from Ukraine will be in place until June 5, 2025. The tariff quota of the association agreement (4,000 MT) will be implemented from January 1, 2025. However, in this case, since the quantities imported since the beginning of 2024 were already above that threshold, Most-Favored Nation duties (MNF) will apply until the end of 2024.

On July 22, 2024, the EU adopted Regulation [\(EU\) 2024/1999](#) which introduces tariff quotas for Ukrainian groats imported into the EU as imports reached the triggering threshold of 20,648.24 MT since the beginning of 2024. Similarly to the tariffs for oats, the activation of the safeguard measure for groats imports from Ukraine will be in place until June 5, 2025. As of January 1, 2025, and until June 5, 2025, a new tariff-rate quota set at 8,603.43 MT will be in place.

### Updates on National Regulatory Framework Imports from Ukraine

Following intense pressure from Bulgaria, Hungary, Poland, Romania, and Slovakia, the Commission adopted temporary preventive measures on imports of a limited number of products from Ukraine under the exceptional safeguard of the Autonomous Trade Measures Regulation. The measures concern only four agricultural products including wheat and corn originating in Ukraine. Between May 2, 2023, and September 15, 2023, wheat and corn from Ukraine continued to be released for free circulation in all the Member States of the European Union other than the five frontline Member States. There was no prolongation of the measures after September by the European Union, which led to different actions at the Member State level. In Romania, these rules have recently been prolonged until the end of 2024. All other agricultural commodities may enter Romania in accordance with the EU-adopted legislation.

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<sup>12</sup> For additional information on EU Policy affecting grains, please consult the [EU Annual Grain and Feed Report 2024](#).

## Increased Tariffs on Russian and Belarusian Grains

On May 30, 2024, the European Union adopted [Council Regulation \(EU\) 2024/1652](#), which increases the tariffs on imports into the EU of wheat, rye, corn, sorghum, and other products from Russia and Belarus. In addition, Russia and Belarus will no longer have access to any of the EU's World Trade Organization (WTO) quotas on grain that offer better tariff treatment for some products. These measures concern products originating in or exported directly or indirectly from Russia and Belarus to the EU. They do not affect transit through the EU from both countries to other third countries. These measures entered into force on July 1, 2024.

### Acknowledgements

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Andreja Misir, FAS/Zagreb covering Croatia  
Bryan Purcell, IPAD/GMA/ FAS/USDA covering weather maps and crop conditions graphs.

## Abbreviations used in this report

<b>Benelux</b>	Belgium, the Netherlands, and Luxemburg
<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 <sup>13</sup>
<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>HPAI</b>	Highly Pathogenic Avian Influenza
<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>TDM<sup>14</sup></b>	Trade Data Monitor LLC.
<b>TY</b>	Trade Year. July to June for wheat, October to September for coarse grains, and January to December for rice
<b>U.S.</b>	United States

## Related Reports

Title	Date
<a href="#">Bulgaria: Grain and Feed Market Update</a>	06/12/2024
<a href="#">Favorable Spring Conditions Promise a Sizeable Grain Crop in Spain</a>	05/23/2024
<a href="#">EU Annual Grain and Feed Report 2024</a>	04/19/2024

## Attachments:

No Attachments

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<sup>13</sup> Austria, Belgium, Luxembourg, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden.

<sup>14</sup> Trade figures throughout the report are based on Trade Data Monitor LLC. data, which are sourced from EU Member State customs data, and the U.S. Bureau of Census.