Cereals market situation

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

30 Oct 2026

2025/2026 marketing year

European Commission

EU 2025/2026 Cereals Balance Sheet

(thousand metric tonnes)

last updated: 30/10/2026

	2025/26 fc.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**8 258**	**1 728**	**580**	**20 492**	**202**	**361**	**1 895**	**1 325**	**153**	**34 993**
Usable production	135 341	55 622	8 051	60 197	7 258	830	8 840	11 414	1 878	289 432
Area (thousand ha)	*21 515*	*9 971*	*2 187*	*8 459*	*1 619*	*209*	*2 600*	*2 454*	*720*	*49 733*
Yield (tonnes/ha)	*6*	*6*	*4*	*7*	*4*	*4*	*3*	*5*	*3*	*6*
Imports (from third countries)	4 580	628	2 102	19 194	1	590	27		137	27 259
Total supply	**148 179**	**57 978**	**10 734**	**99 884**	**7 460**	**1 781**	**10 762**	**12 739**	**2 167**	**351 684**
Total domestic use	103 594	43 393	8 959	77 079	6 745	1 100	6 536	10 354	1 976	259 737
Human consumption	41 954	365	8 211	4 779	3 085	157	1 120	52	23	59 746
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 200	6 800	95	12 100	1 400		101	445	170	30 310
of which bioethanol/biofuel	*3 400*	*537*		*7 000*	*800*			*344*	*14*	*12 095*
Animal feed	47 028	33 763	205	59 436	1 917	910	4 912	9 288	1 502	158 963
Losses	812	334	48	361	44	5	53	68	11	1 737
Exports (to third countries)	29 131	12 553	926	2 508	67	13	183	2	13	45 397
Total use	**132 725**	**55 946**	**9 885**	**79 587**	**6 812**	**1 114**	**6 719**	**10 355**	**1 990**	**305 134**
Ending stocks**	**15 453**	**2 032**	**849**	**20 297**	**648**	**667**	**4 042**	**2 384**	**178**	**46 550**
Change in stocks**	7 196	304	269	-196	446	306	2 148	1 059	25	11 557

* Marketing year: from July to June

** At the end of the marketing year

European Commission

EU Cereals Balance Sheet 2025/2026 (Summary)

- Total **EU cereals production** is now estimated at **289.4 million tonnes**.
- **Feed consumption** was revised as follows: 0.3 million tonnes were shifted from other cereals equally to soft wheat, barley and maize.

European Commission

2026/2027 marketing year

European Commission

EU27 2026/2027 Area

(million ha)

	2025/26 Forecast	2026/27 Sep Projection	2026/27 Oct Projection	2026/27 vs. 2025/26 (%)	2026/27 vs. 5-year av. (%)
Soft wheat	*21.5*	*21.2*	*21.2*	*-1.6*	*-2.7*
Durum wheat	*2.2*	*2.0*	*2.0*	*-6.3*	*-8.8*
Barley	*10.0*	*10.4*	*10.4*	*3.8*	*0.7*
Maize	*8.5*	*7.4*	*7.4*	*-12.8*	*-14.8*
Rye	*1.6*	*1.6*	*1.6*	*-4.1*	*-12.3*
Oats	*2.6*	*2.5*	*2.5*	*-4.1*	*0.9*
Total	**49.7**	**48.4**	**48.3**	**-2.9**	**-4.4**

Source: DG AGRI - E4

European Commission

JRC maize yield forecasts

Country	Grain maize Yield forecasts for 2026 [t/ha]				
	prev. month	latest forecast	% diff 5yrs avg	% diff 2025	% diff prev. month
EU	6.50	**6.42**	-9	-10	-1
AT	7.94	**7.30**	-30	-34	-8
BE	8.87	**8.87**	-18	-7	±0
BG	5.76	**5.76**	+34	+136	±0
CY	–	–	–	–	–
CZ	6.29	**6.29**	-27	-29	±0
DE	7.91	**7.88**	-19	-22	±0
DK	–	–	–	–	–
EE	–	–	–	–	–
EL	11.0	**11.0**	+1	+20	±0
ES	11.9	**11.9**	-2	-4	±0
FI	–	–	–	–	–
FR	6.45	**6.30**	-31	-27	-2
HR	6.35	**6.16**	-13	-3	-3
HU	3.36	**3.12**	-46	-41	-7
IE	–	–	–	–	–
IT	8.39	**8.39**	-15	-18	±0
LT	7.06	**6.53**	-2	-7	-8
LU	–	–	–	–	–
LV	–	–	–	–	–
MT	–	–	–	–	–
NL	11.1	**11.1**	-6	-7	±0
PL	7.30	**7.30**	-2	-7	±0
PT	9.90	**9.67**	+2	+20	-2
RO	4.64	**4.64**	+15	+18	±0
SE	–	–	–	–	–
SI	6.78	**6.32**	-23	-11	-7
SK	4.96	**4.75**	-33	-42	-4

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EU27 2026/2027 Production

(million tonnes)

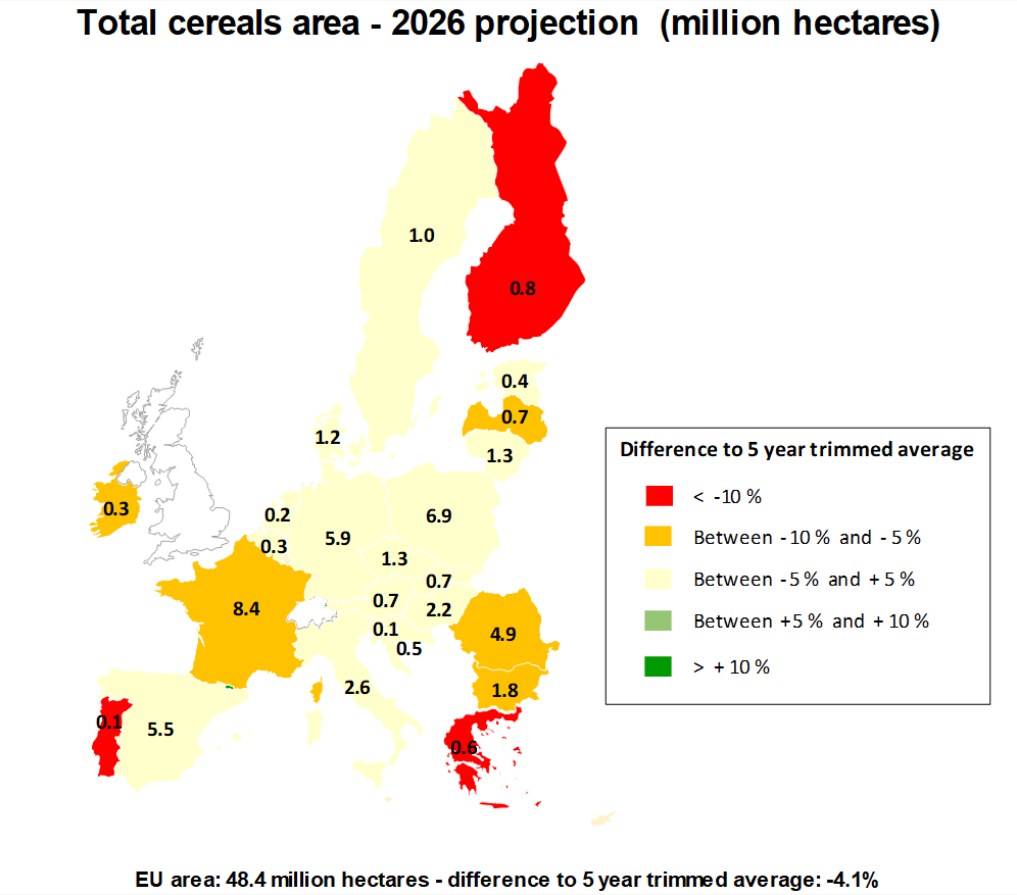
	2025/26 Forecast	2026/27 Sep Projection	2026/27 Oct Projection	2026/27 vs. 2025/26 (%)	2026/27 vs. 5-year av. (%)
Soft wheat	*135.3*	*124.2*	*123.7*	*-8.6*	*-2.4*
Durum wheat	*8.1*	*7.7*	*7.7*	*-4.7*	*-0.6*
Barley	*55.6*	*53.6*	*53.2*	*-4.4*	*5.3*
Maize	*60.2*	*48.3*	*47.0*	*-21.9*	*-22.0*
Rye	*7.3*	*6.7*	*6.7*	*-7.8*	*-8.5*
Oats	*8.8*	*7.9*	*7.9*	*-10.8*	*5.4*
Total	**289.4**	**262.0**	**259.1**	**-10.5**	**-5.7**

Source: DG AGRI - E4

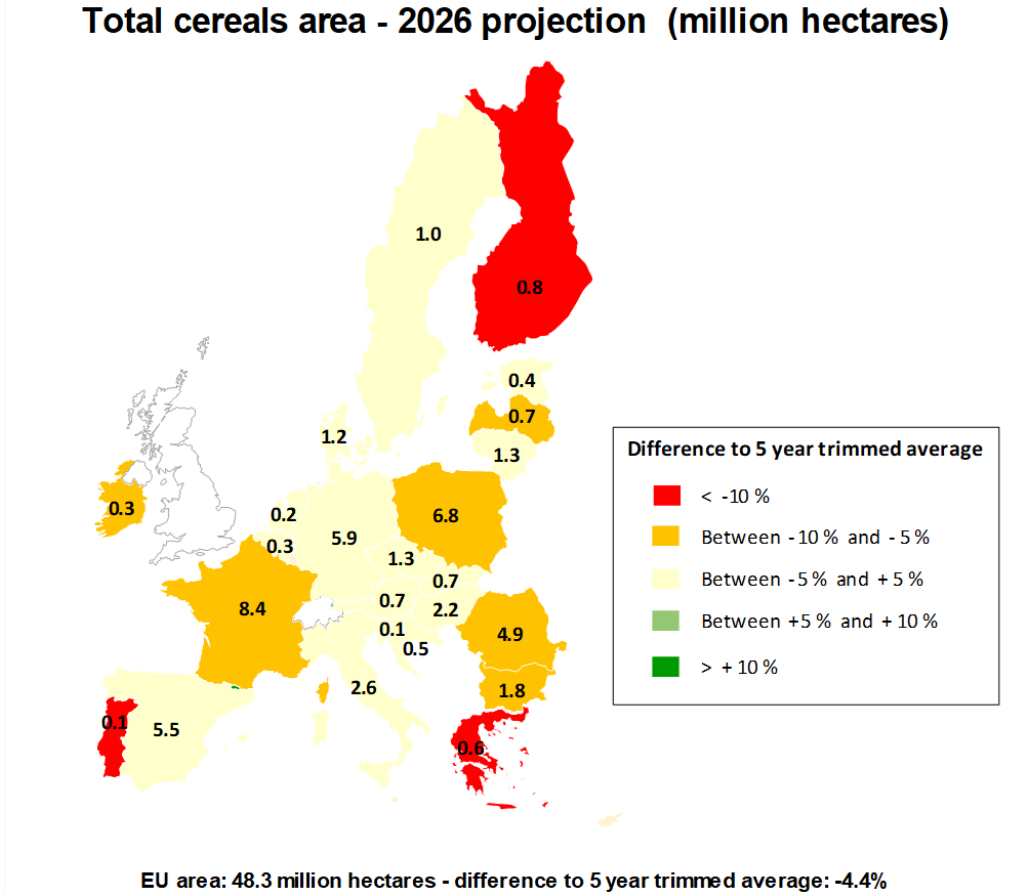
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Total cereals 2026/27 - area

Sep 2026 Projection



Oct 2026 Projection

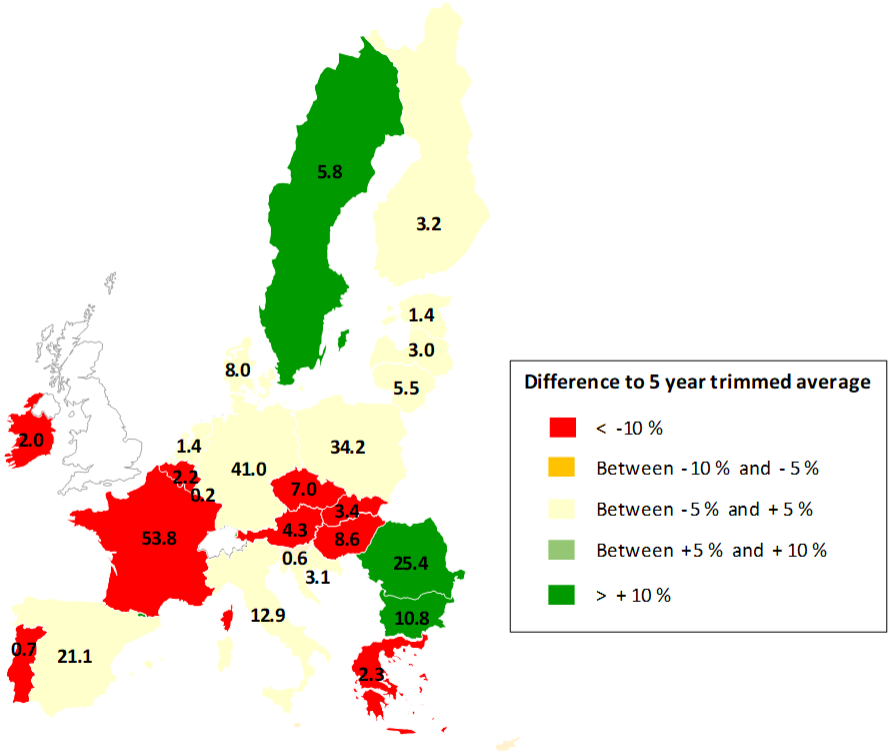


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Total cereals 2026/27 - production

Sep 2026 Projection

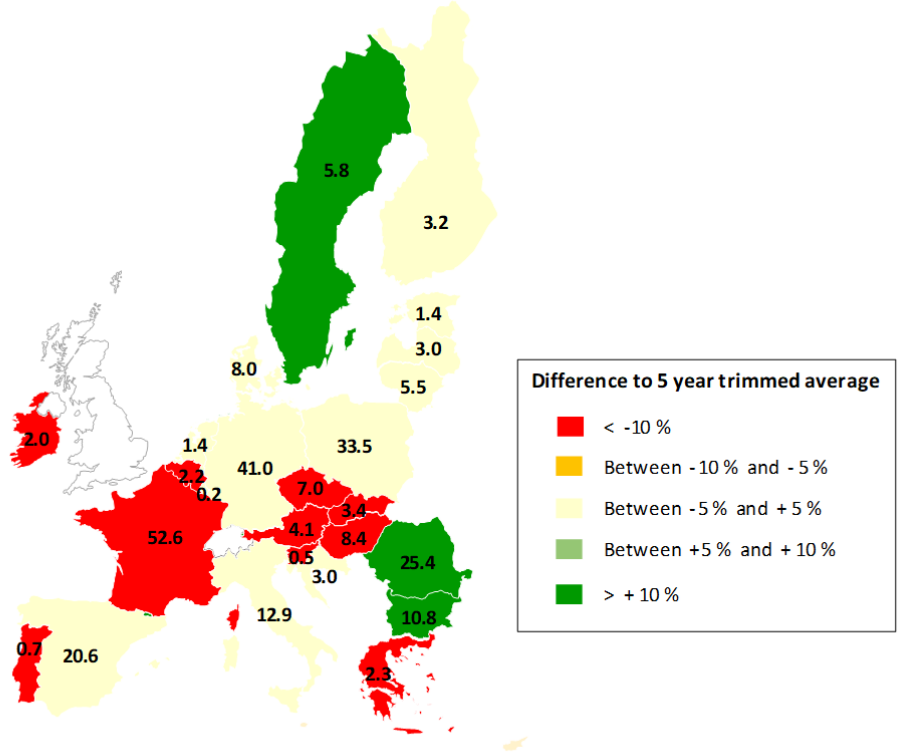
Total cereals production - 2026 projection (million tonnes)



EU production: 262 million tonnes - difference to 5 year trimmed average: -4.7%

Oct 2026 Projection

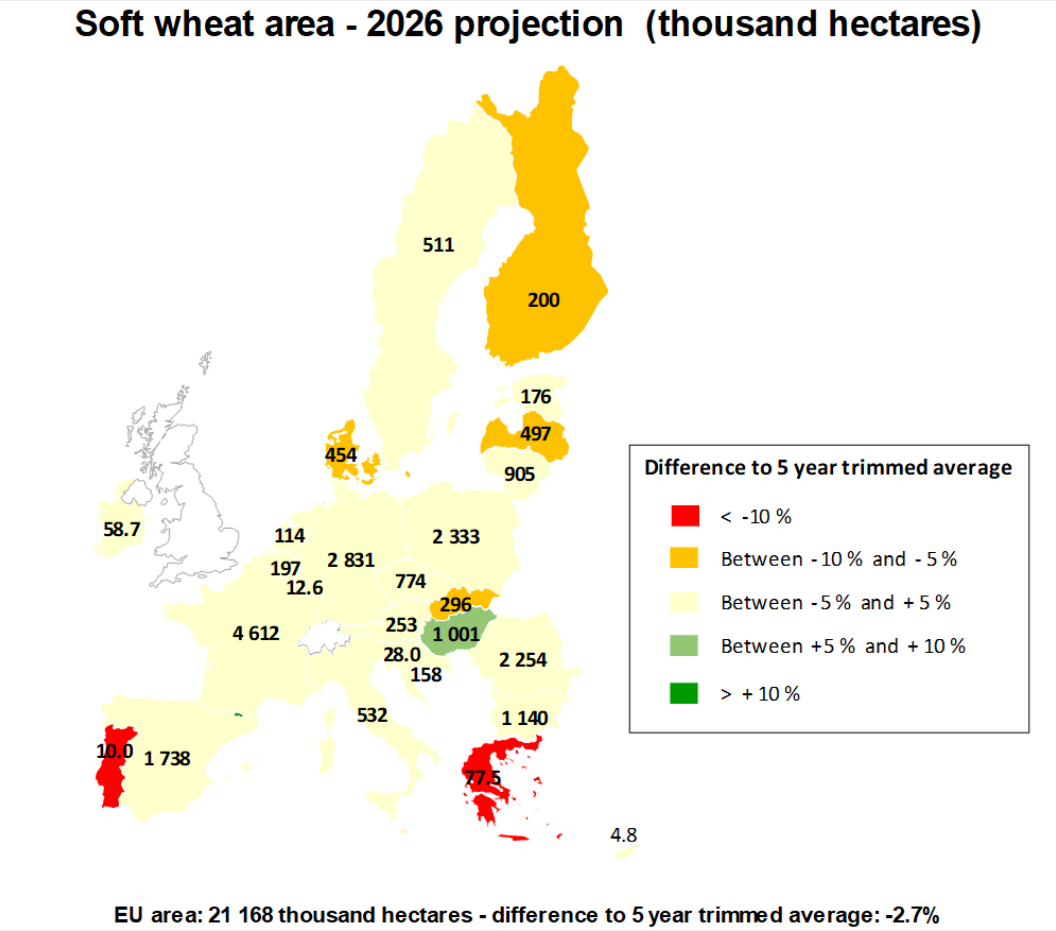
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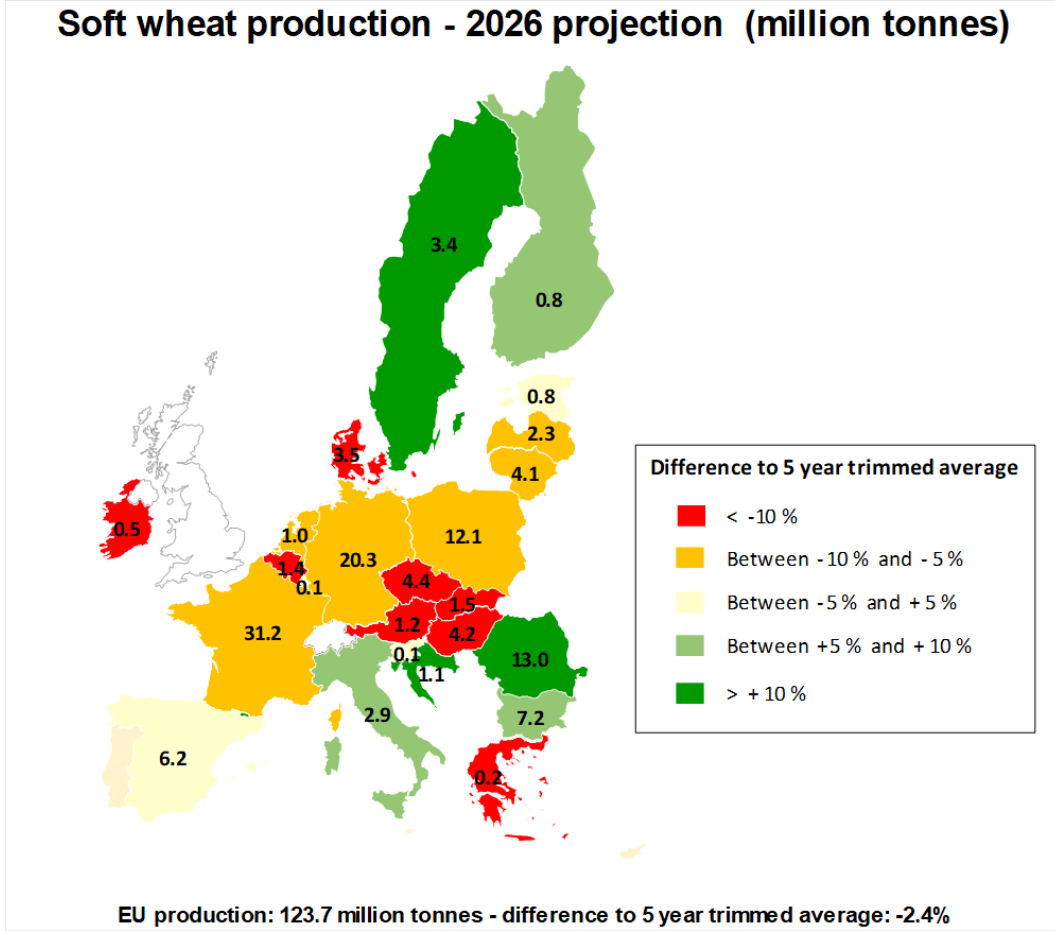


EU production: 259.1 million tonnes - difference to 5 year trimmed average: -5.7%

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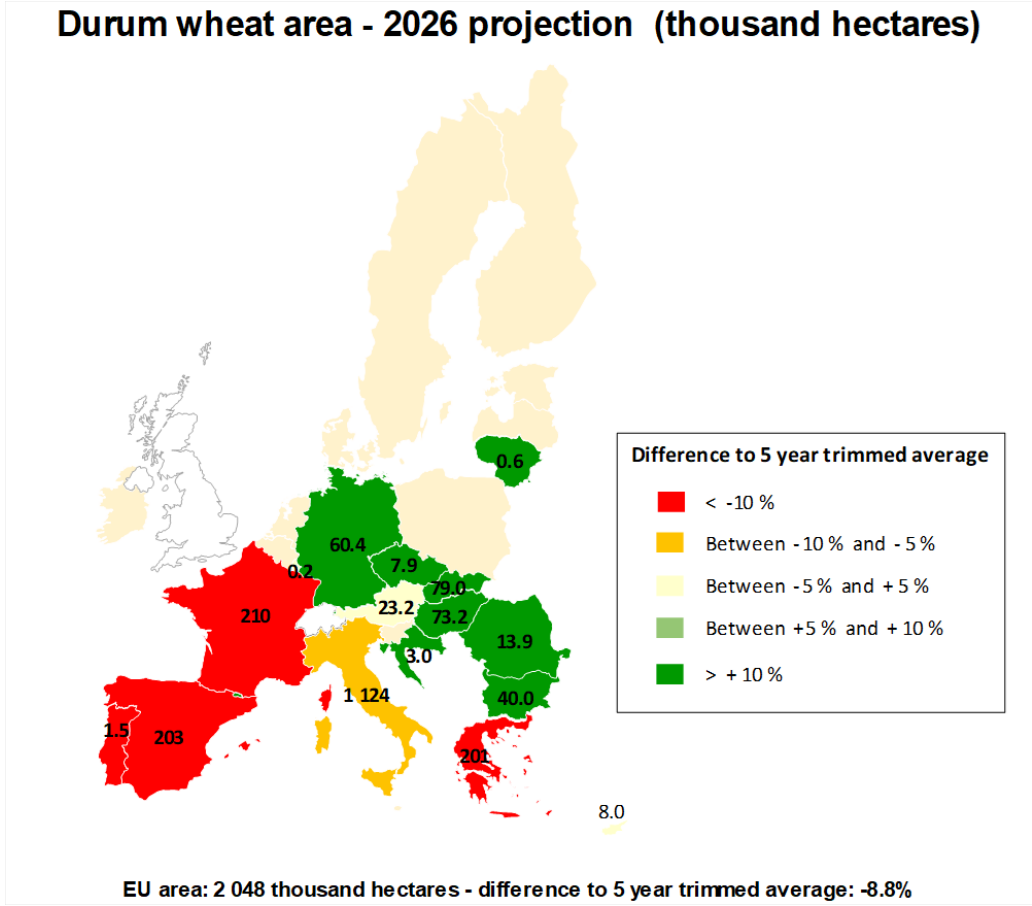
Soft wheat 2026/27

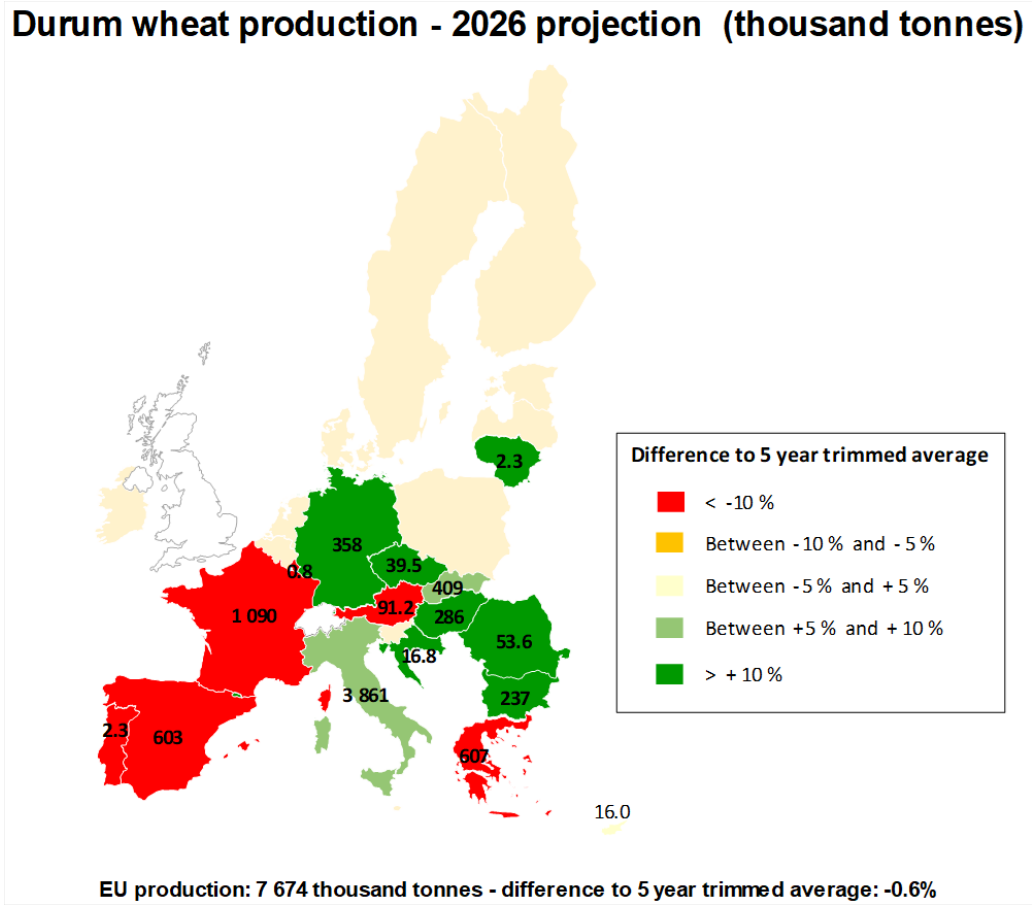




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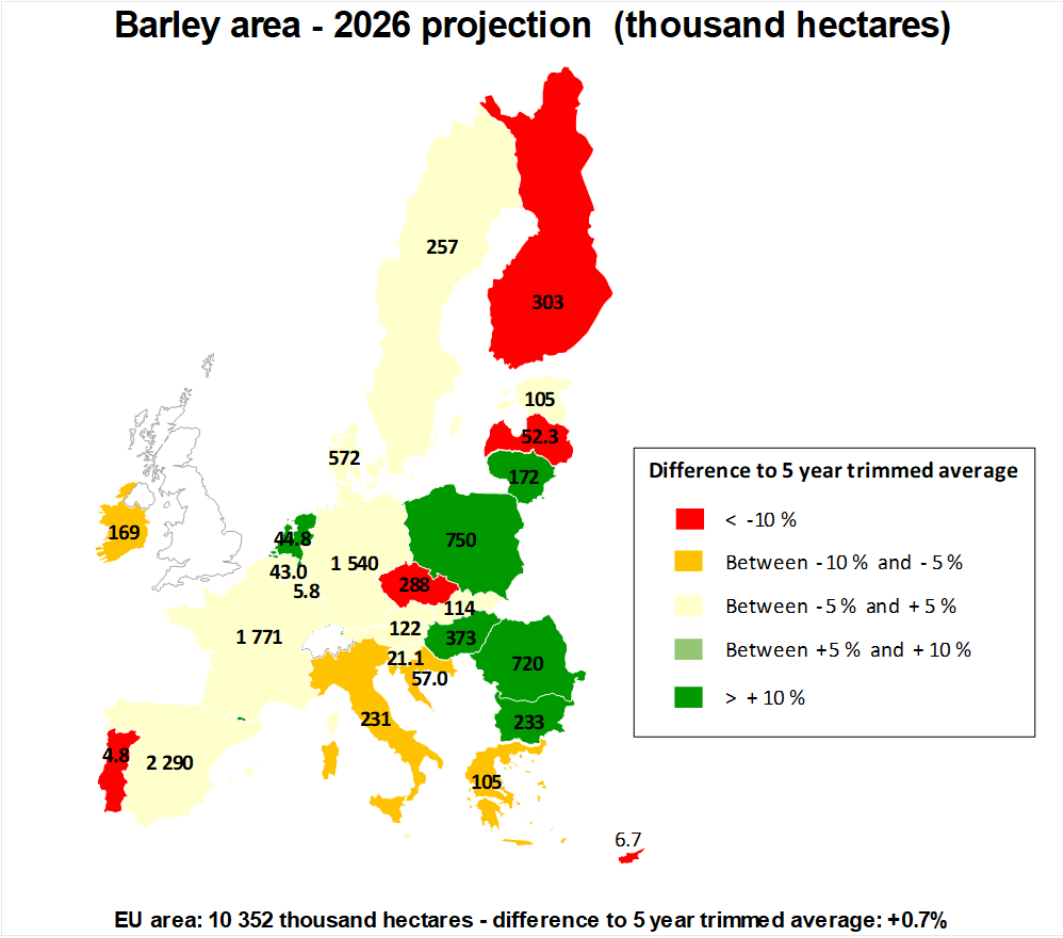
Durum wheat 2026/27

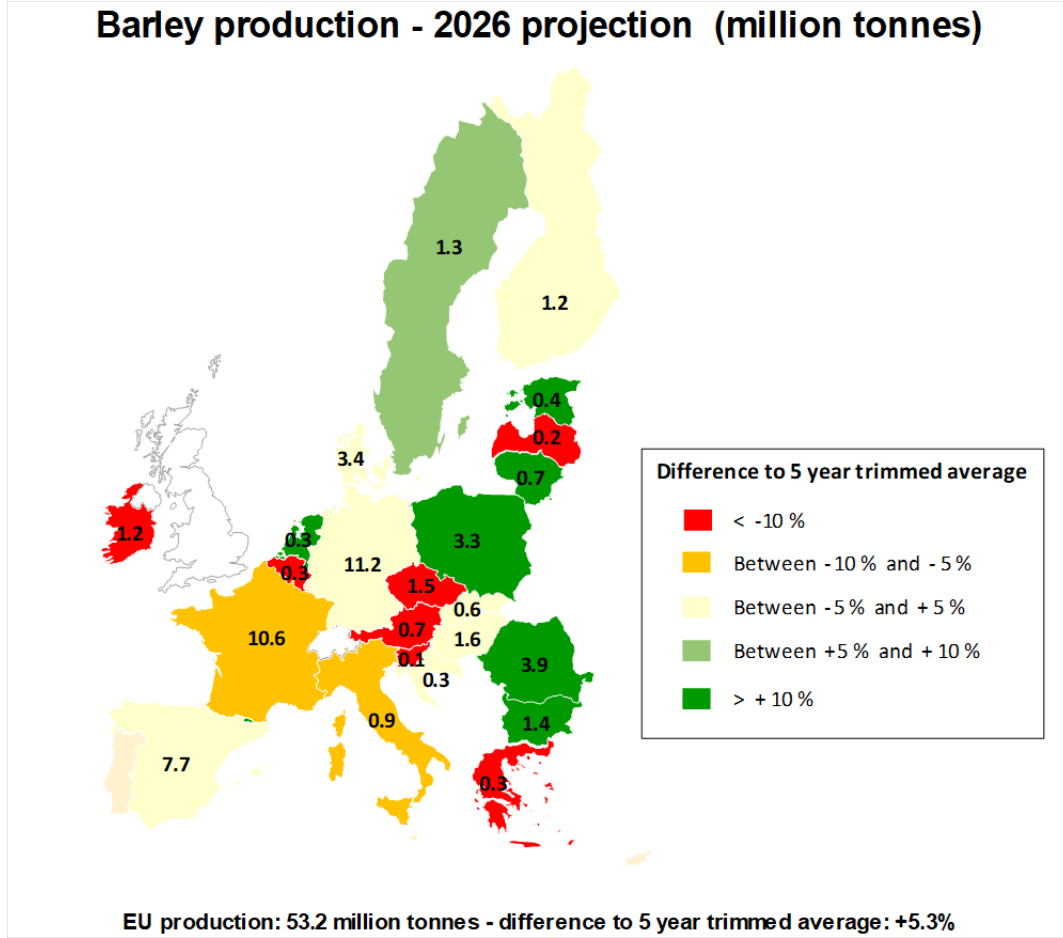




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Barley 2026/27

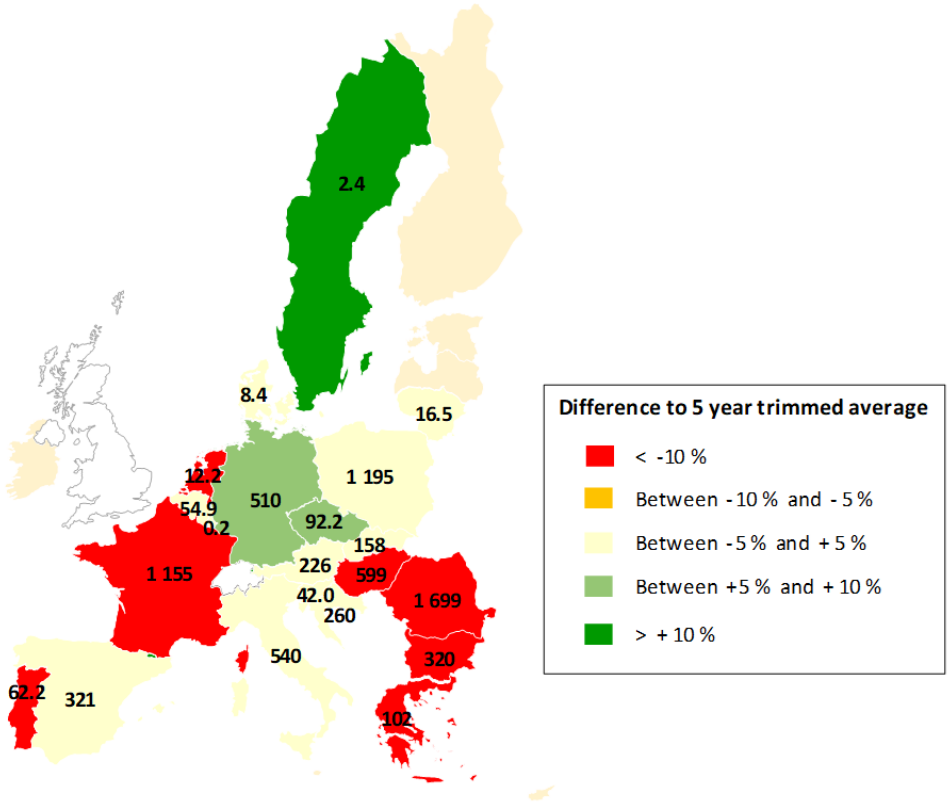




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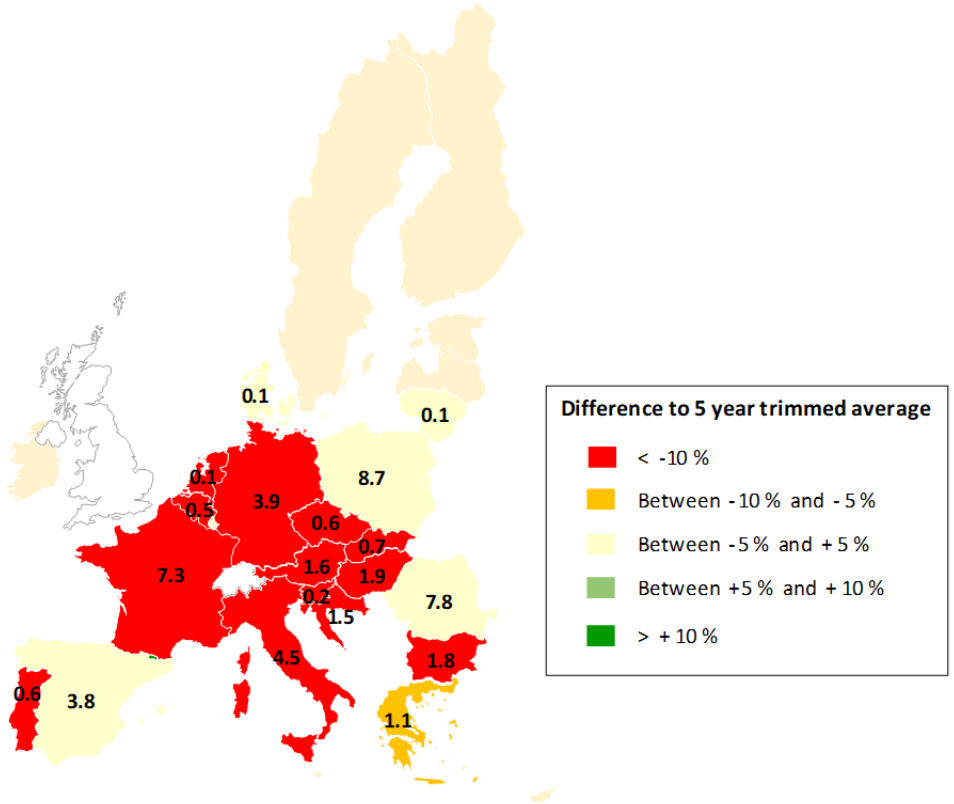
Maize 2026/27

Maize area - 2026 projection (thousand hectares)



EU area: 7 375 thousand hectares - difference to 5 year trimmed average: -14.8%

Maize production - 2026 projection (million tonnes)



EU production: 47 million tonnes - difference to 5 year trimmed average: -22%

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EU 2026/2027 Usable Production: comparison with other forecasters

(million tonnes)

	EC DG AGRI 30-October	Stratégie Grains 23-October	COCERAL 22-September
Soft Wheat	*123.7*	*126.0*	*126.2*
Durum Wheat	*7.7*	*7.6*	*7.6*
Barley	*53.2*	*51.6*	*52.4*
Maize	*47.0*	*45.2*	*48.6*
Rye	*6.7*	*6.7*	*7.1*
Total Cereals	**259.1**	**257.1**	**261.2**

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2026/2027 – Production evolution

	month/month variation	year/year variation	vs. 5-year average
France	*-2.2%*	*-16.4%*	*-15.8%*
Germany	*0.0%*	*-8.6%*	*-3.3%*
Poland	*-2.0%*	*-9.3%*	*-4.5%*
Romania	*0.0%*	*2.8%*	*18.9%*
Spain	*-2.3%*	*-14.2%*	*-0.3%*
Italy	*0.0%*	*-1.4%*	*-2.3%*
Bulgaria	*0.0%*	*14.5%*	*12.3%*

76% of the EU production

Source: DG AGRI - E4

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2026/2027 – 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	**21 168**	197	1 140	774	454	2 831	176	59	77	1 738	4 612	158	532	5	497	905	13	1 001	114	253	2 333	10	2 254	28	296	200	511
	Yield	**5.89**	7.18	6.37	5.67	7.75	7.22	4.42	9.09	2.91	3.62	6.83	6.82	5.56	1.78	4.67	4.61	5.77	4.21	8.57	4.96	5.22	3.34	5.80	5.23	5.19	4.15	6.75
	Production	**124 633**	1 414	7 260	4 389	3 519	20 456	778	534	225	6 285	31 486	1 078	2 957	8	2 323	4 174	73	4 212	978	1 255	12 174	33	13 064	147	1 532	829	3 449
Durum wheat	Area	**2 048**	0	40	8	0	60	0	0	201	203	210	3	1 124	8	0	1	0	73	0	23	0	1	14	0	79	0	0
	Yield	**3.79**		6.00	5.08		5.98			3.05	3.00	5.25	5.67	3.47	2.04		3.95	3.90	3.94		3.97		1.60	3.90		5.24		
	Production	**7 755**	0	240	40	0	361	0	0	613	610	1 102	17	3 902	16	0	2	1	289	0	92	0	2	54	0	414	0	0
Barley	Area	**10 352**	43	233	288	572	1 540	105	169	105	2 290	1 771	57	231	7	52	172	6	373	45	122	750	5	720	21	114	303	257
	Yield	**5.18**	6.52	5.88	5.40	6.07	7.35	3.89	7.30	2.60	3.39	6.01	5.60	4.06	2.28	3.96	4.14	5.98	4.44	7.09	5.50	4.46	2.94	5.44	4.60	5.07	3.88	5.21
	Production	**53 648**	280	1 370	1 554	3 474	11 314	410	1 236	273	7 754	10 643	319	937	15	207	711	35	1 656	318	673	3 350	14	3 917	97	579	1 173	1 339
Grain maize	Area	**7 375**	55	320	92	8	510	0	0	102	321	1 155	260	540	0	0	16	0	599	12	226	1 195	62	1 699	42	158	0	2
	Yield	**6.40**	8.87	5.76	6.29	6.56	7.76			11.01	11.91	6.30	5.90	8.39			6.53	7.99	3.12	11.11	7.30	7.30	9.67	4.64	5.89	4.75		7.43
	Production	**47 196**	487	1 843	580	55	3 962	0	0	1 119	3 824	7 284	1 534	4 527	0	0	108	2	1 869	136	1 647	8 722	602	7 882	247	749	0	18
Rye	Area	**1 552**	1	6	22	114	508	16	5	6	99	30	1	3	0	20	20	1	28	2	30	561	11	13	1	9	16	27
	Yield	**4.41**	5.10	2.50	4.87	6.12	5.57	3.80	9.01	1.80	2.15	3.69	3.75	3.02		4.20	2.48	5.50	2.81	3.50	4.13	3.68	0.95	3.35	3.83	3.14	3.85	6.12
	Production	**6 842**	4	15	108	700	2 831	61	44	11	212	112	5	10	0	83	49	7	79	8	124	2 063	11	45	4	29	62	167
Oats	Area	**2 494**	3	30	46	58	174	47	24	61	513	90	15	91	0	109	118	2	25	1	19	526	29	73	1	10	273	154
	Yield	**3.20**	3.94	2.23	3.07	5.02	4.15	2.44	7.49	1.17	2.23	3.90	3.33	2.38	1.56	3.60	2.33	4.73	2.25	4.71	3.39	3.32	0.97	2.68	2.86	2.31	4.13	4.39
	Production	**7 971**	13	67	141	293	723	115	182	72	1 146	351	50	218	0	393	274	7	57	6	63	1 746	28	196	2	24	1 129	676
Sorghum	Area	**161**	0	10	0	0	0	0	0	2	5	33	0	47	0	0	0	0	31	0	5	0	0	17	0	10	0	0
	Yield	**3.91**		2.20						3.89	3.71	3.52		5.81					3.14		6.18			1.61	3.25	3.30		
	Production	**629**	0	22	0	0	0	0	0	7	19	117	0	272	0	0	0	0	98	0	33	0	0	28	0	33	0	0
Triticale	Area	**2 457**	5	19	48	7	277	7	0	10	285	323	10	16	1	10	65	5	70	2	47	1 109	8	77	6	9	9	33
	Yield	**4.43**	5.27	4.11	4.94	6.40	5.94	4.44		2.31	2.79	4.60	4.80	4.55	1.75	3.90	3.16	6.33	3.44	4.66	5.13	4.48	2.23	4.75	4.59	3.60	4.10	5.86
	Production	**10 897**	28	78	238	47	1 645	30	0	22	793	1 489	48	74	1	40	206	30	240	7	240	4 967	17	364	29	34	36	192
Other cereals	Area	**672**	1	4	5	10	23	7	0	1	49	129	1	26	0	24	51	0	7	1	13	293	1	1	5	2	9	11
	Yield	**2.69**	3.58	1.76	1.77	2.96	3.81	1.22	0.00	3.12	2.32	3.30	1.06	2.83		1.24	0.93	4.14	1.34	0.00	2.82	2.89	0.98	1.90	0.69	0.91	3.57	3.58
	Production	**1 807**	4	8	9	28	86	9	0	2	114	426	1	72	0	29	47	1	10	0	35	847	1	3	3	2	31	38
Total cereals	Area	**48 279**	305	1 802	1 284	1 224	5 923	358	257	564	5 504	8 354	505	2 609	20	712	1 347	27	2 208	177	738	6 768	127	4 869	104	687	809	995
	Yield	**5.41**	7.30	6.05	5.50	6.63	6.99	3.91	7.76	4.15	3.77	6.35	6.04	4.97	2.04	4.32	4.14	5.83	3.85	8.22	5.64	5.00	5.57	5.25	5.09	4.94	4.03	5.91
	Production	**261 379**	2 231	10 903	7 059	8 116	41 377	1 403	1 996	2 344	20 758	53 009	3 052	12 970	42	3 076	5 571	156	8 510	1 453	4 164	33 870	708	25 552	529	3 395	3 259	5 879

MAJ 20261030

European Commission

EU 2026/2027 Cereals Balance Sheet

(thousand metric tonnes)

last updated: 30/10/2026	2026/27 proj.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	**15 453**	**2 032**	**849**	**20 297**	**648**	**667**	**4 042**	**2 384**	**178**	**46 550**
Usable production	123 661	53 192	7 674	46 998	6 691	598	7 884	10 679	1 722	259 099
Area (thousand ha)	*21 168*	*10 352*	*2 048*	*7 375*	*1 552*	*161*	*2 494*	*2 457*	*672*	*48 279*
Yield (tonnes/ha)	*6*	*5*	*4*	*6*	*4*	*4*	*3*	*4*	*3*	*5*
Imports (from third countries)	4 580	628	2 069	25 000	103	104	110	1	137	32 732
Total supply	**143 694**	**55 853**	**10 592**	**92 295**	**7 442**	**1 369**	**12 036**	**13 064**	**2 037**	**338 381**
Total domestic use	104 093	43 879	8 970	76 308	6 747	799	7 032	10 349	1 975	260 152
Human consumption	42 022	366	8 224	4 787	3 090	157	1 122	52	23	59 844
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 200	6 800	95	12 100	1 400		101	445	170	30 310
of which bioethanol/biofuel	*3 400*	*537*		*7 000*	*800*			*344*	*14*	*12 095*
Animal feed	47 528	34 263	205	58 736	1 917	610	5 412	9 288	1 502	159 463
Losses	742	319	46	282	40	4	47	64	10	1 555
Exports (to third countries)	29 000	10 111	947	2 500	147	14	131	3	15	42 867
Total use	**133 093**	**53 990**	**9 917**	**78 808**	**6 893**	**813**	**7 164**	**10 352**	**1 990**	**303 019**
Ending stocks**	**10 601**	**1 863**	**675**	**13 487**	**549**	**555**	**4 872**	**2 712**	**47**	**35 361**
Change in stocks**	-4 852	-169	-174	-6 809	-99	-112	830	328	-131	-11 189

* Marketing year: from July to June

** At the end of the marketing year

European Commission

EU Cereals Balance Sheet 2026/2027 (Summary)

- Total **EU cereals production** is now projected at **259.1 million tonnes**. It is 5.7% below the five-year trimmed average and -10.5% year-on-year.

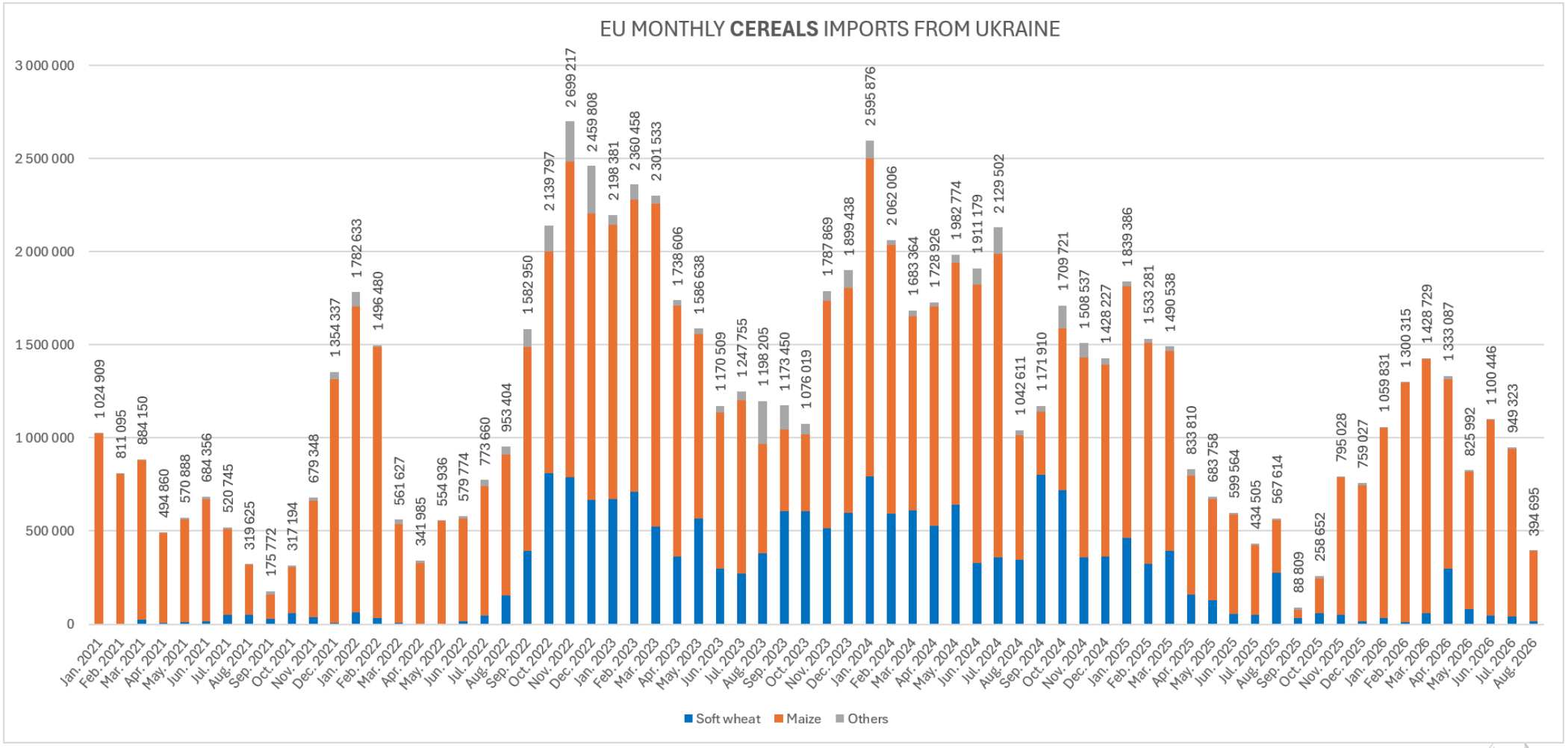
- **Trade** forecasts are unchanged.

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Focus on EU imports from Ukraine

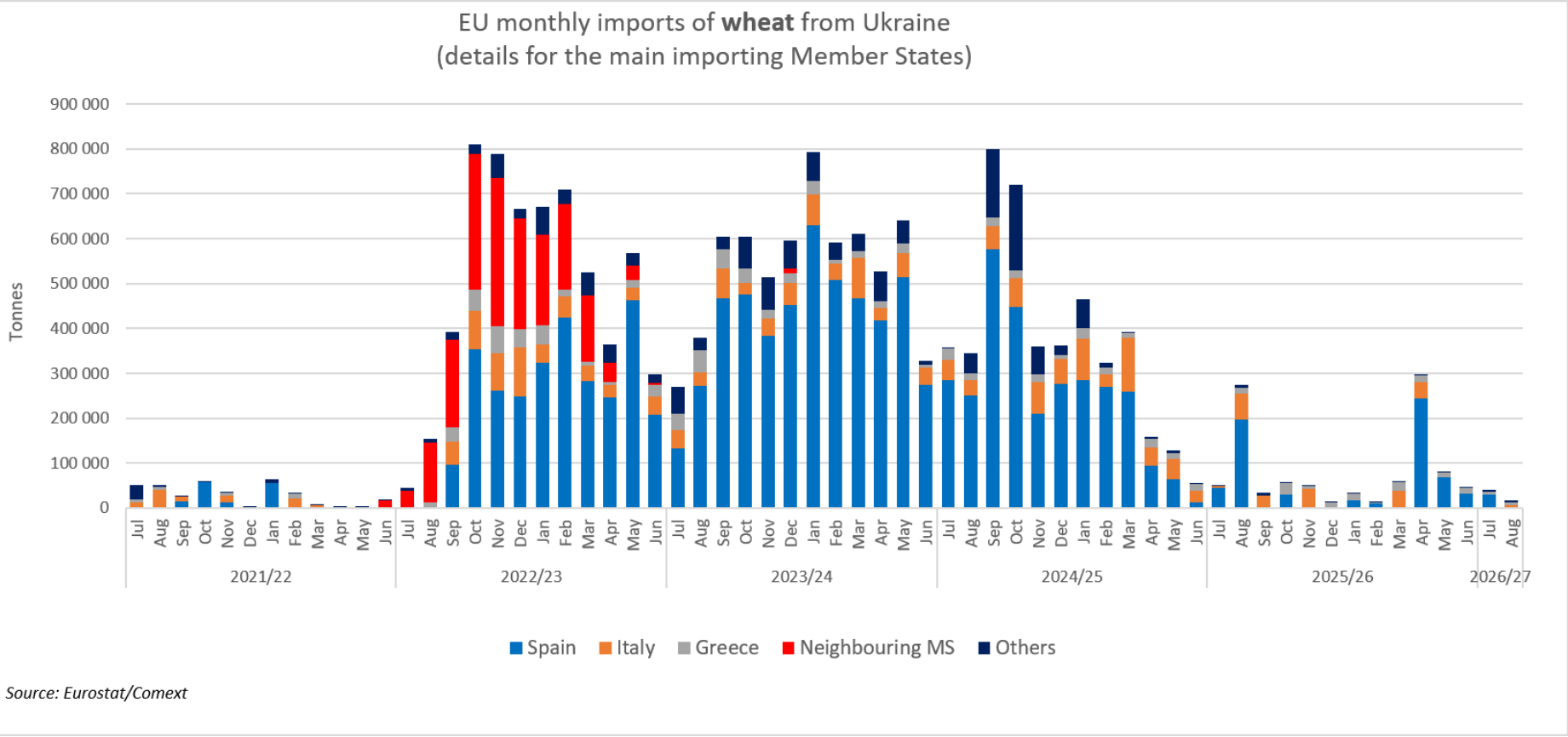
European Commission

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

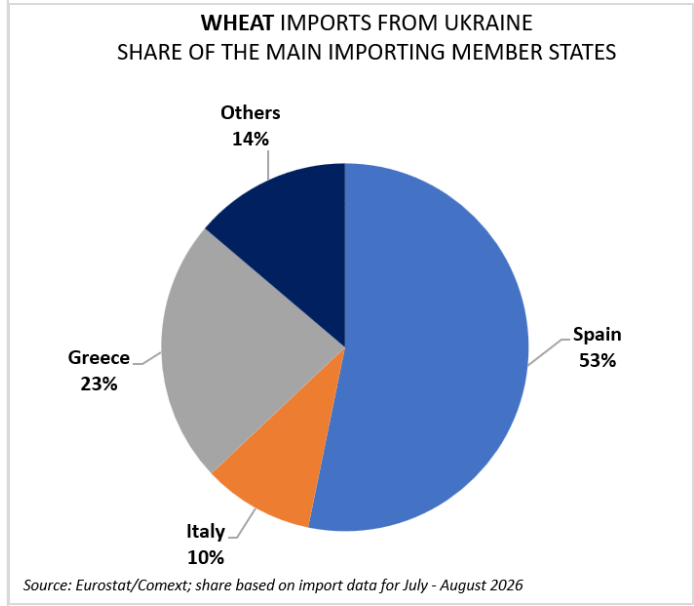


European Commission

EU imports from Ukraine - wheat



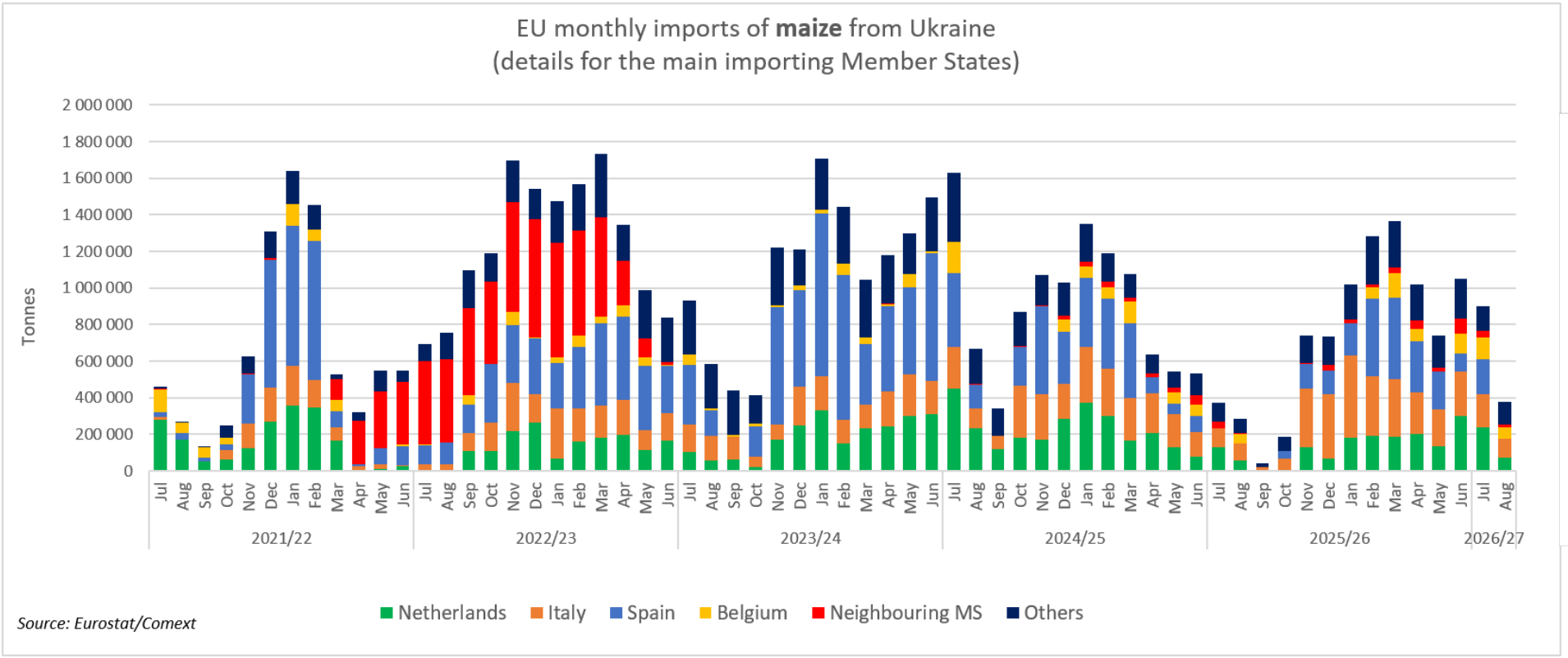
Source: Eurostat/Comext

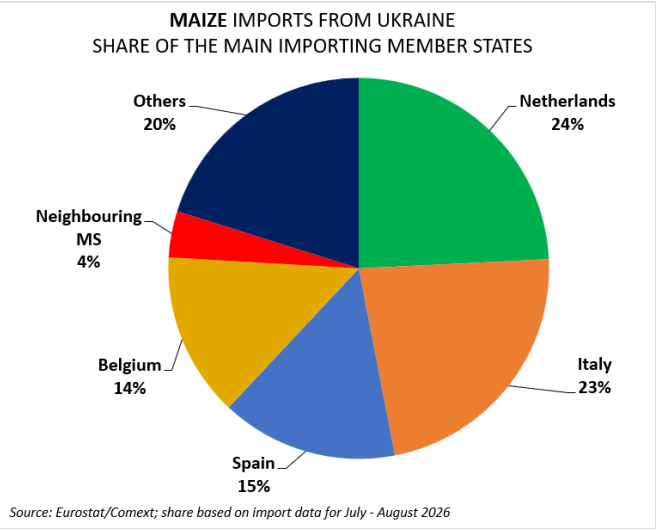


Source: Eurostat/Comext; share based on import data for July - August 2026

European Commission

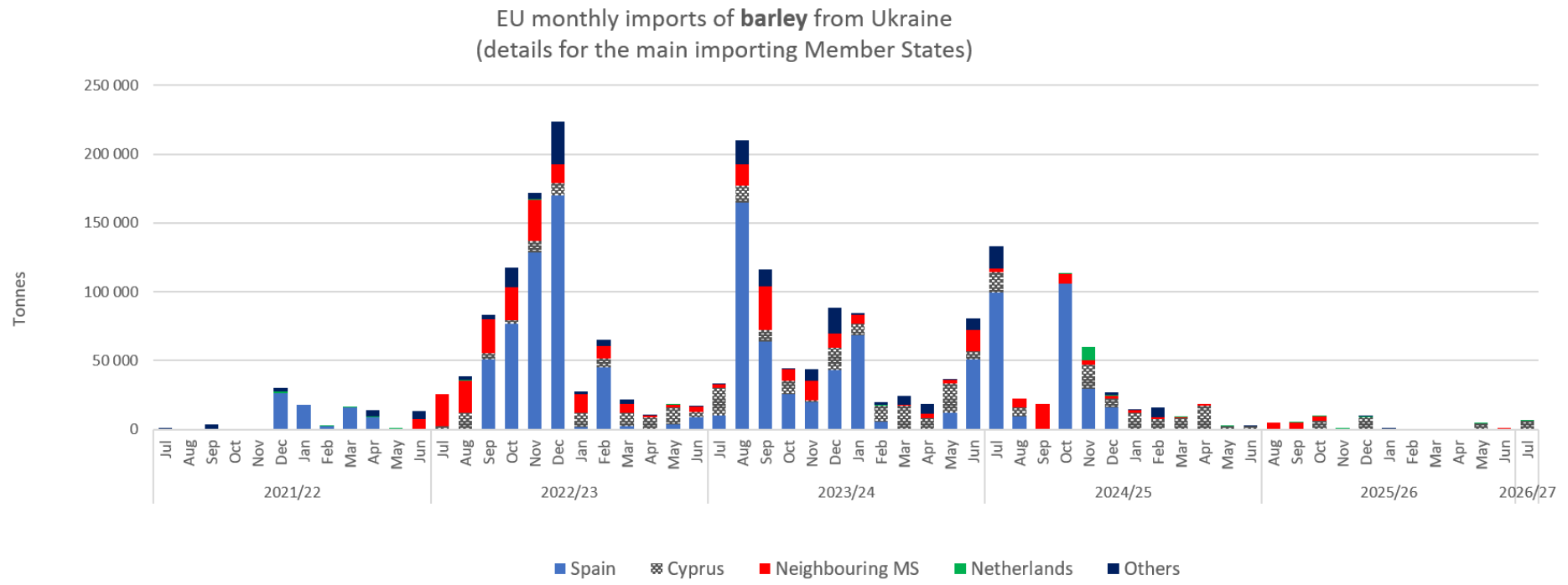
EU imports from Ukraine - maize



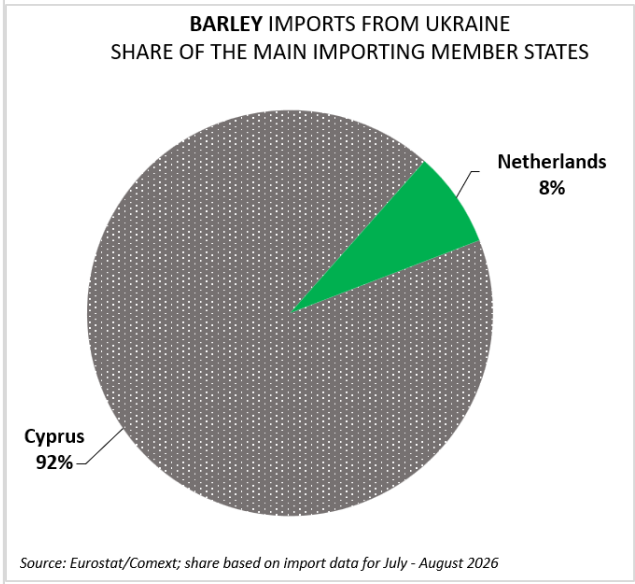


European Commission

EU imports from Ukraine - barley



Source: Eurostat/Comext



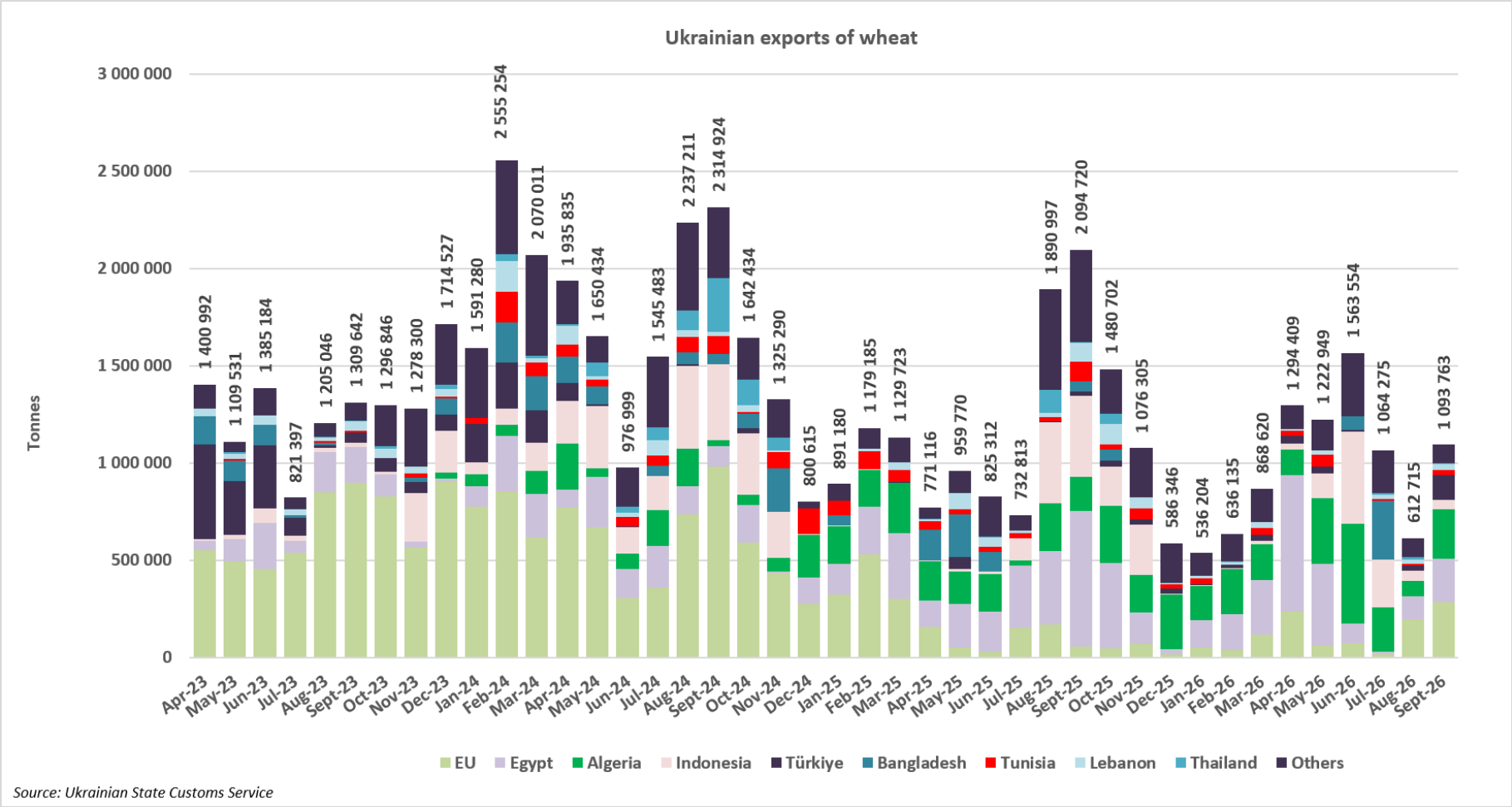
Source: Eurostat/Comext; share based on import data for July - August 2026

European Commission

Ukrainian cereals exports

European Commission

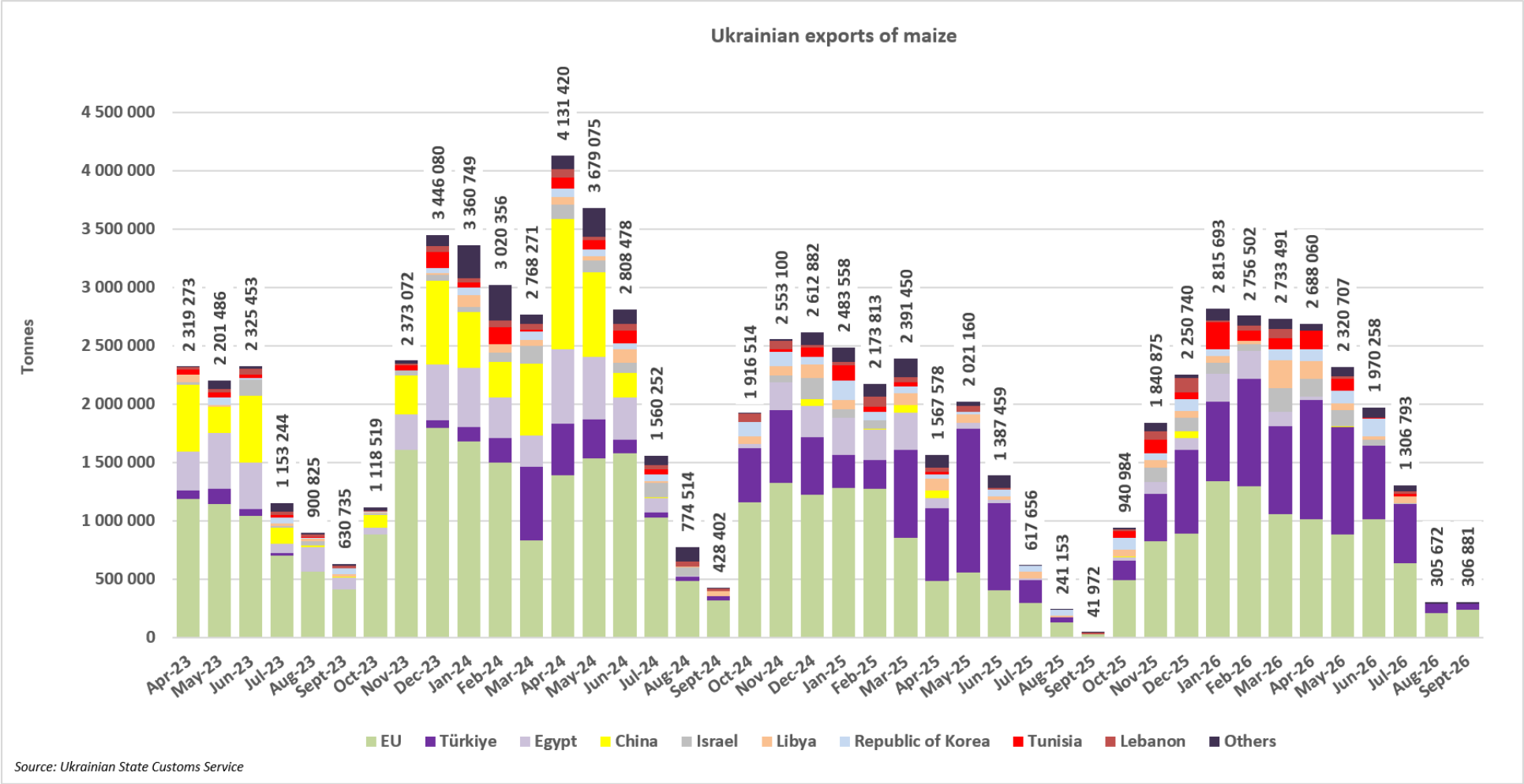
UA wheat exports



Source: Ukrainian State Customs Service

European Commission

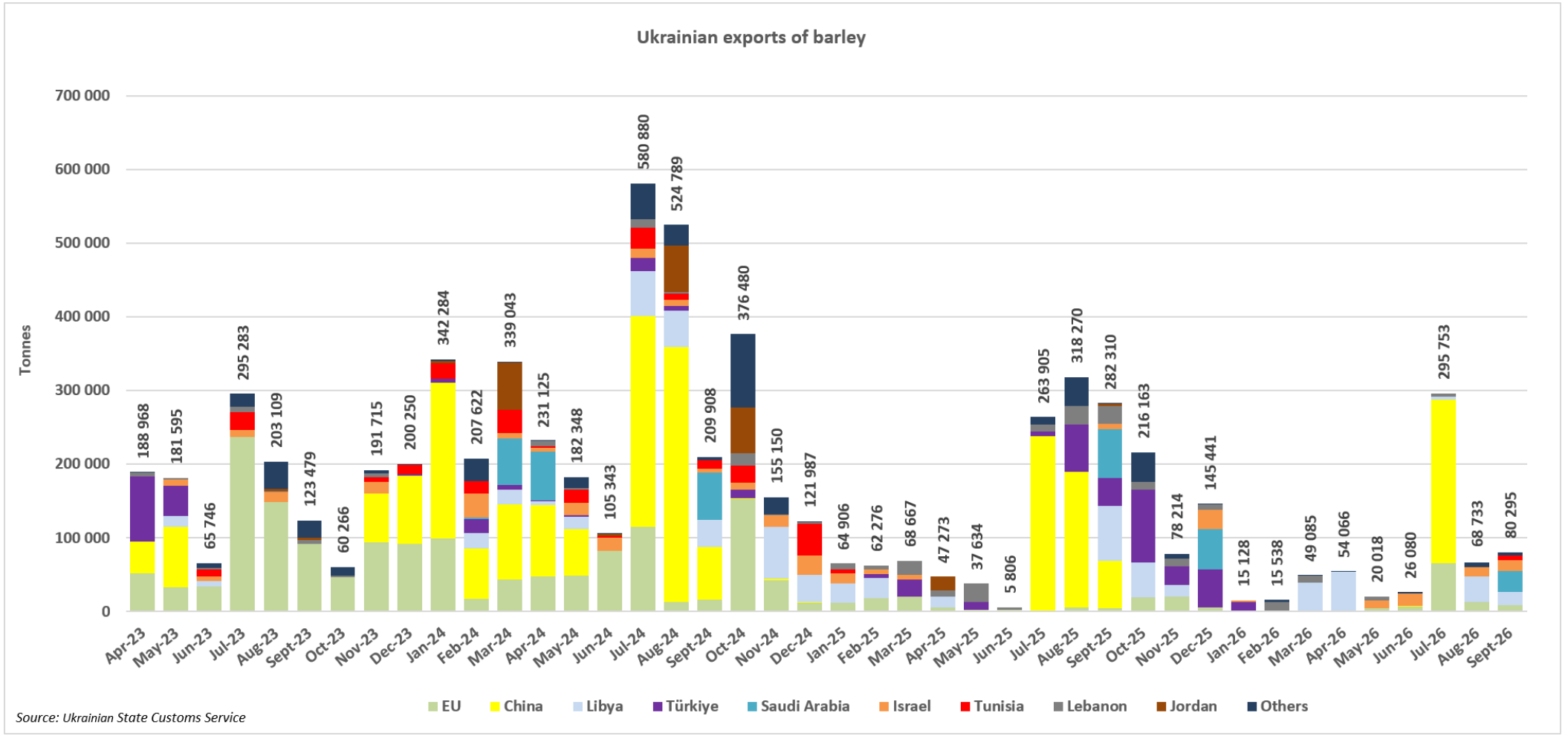
UA maize exports



Source: Ukrainian State Customs Service

European Commission

UA barley exports



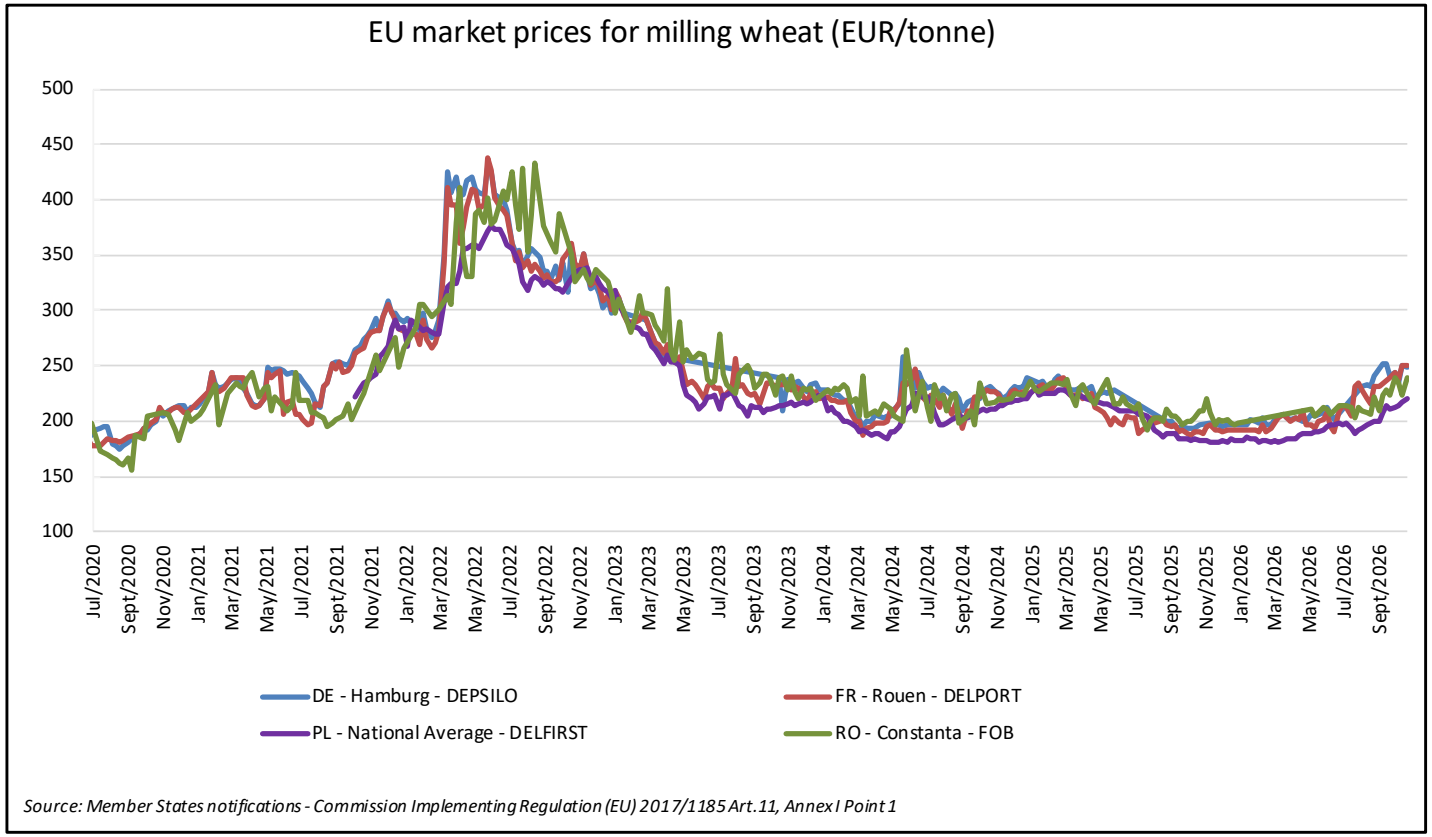
Source: Ukrainian State Customs Service

European Commission

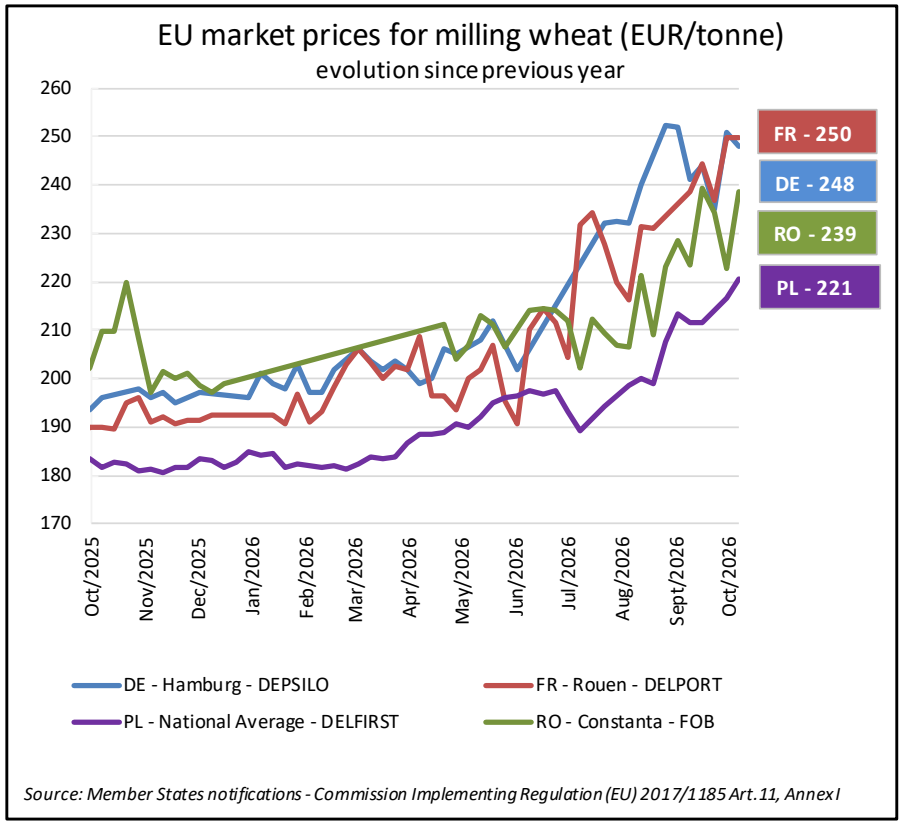
EU cereals market prices

European Commission

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



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



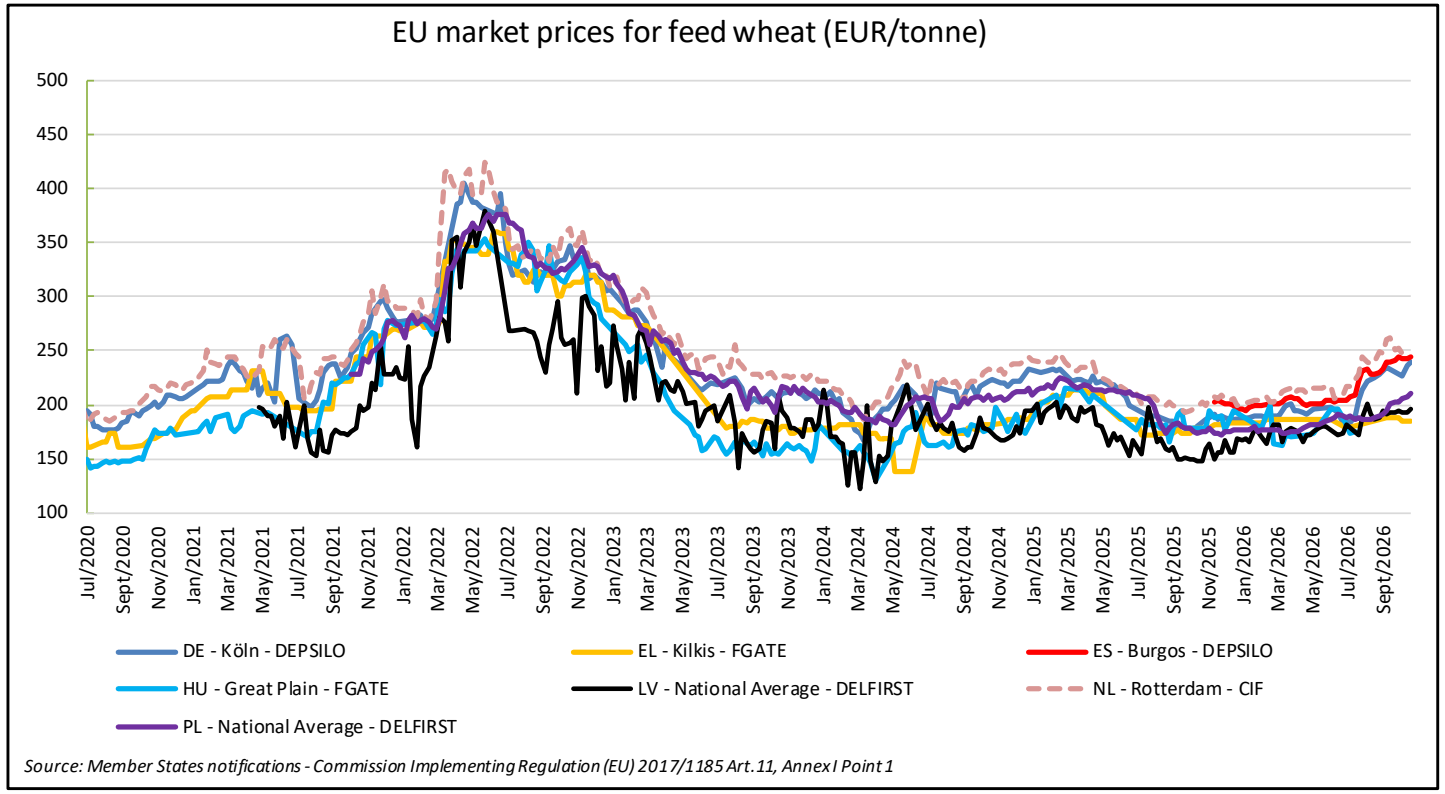
Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I

France
(DELPORT Rouen)

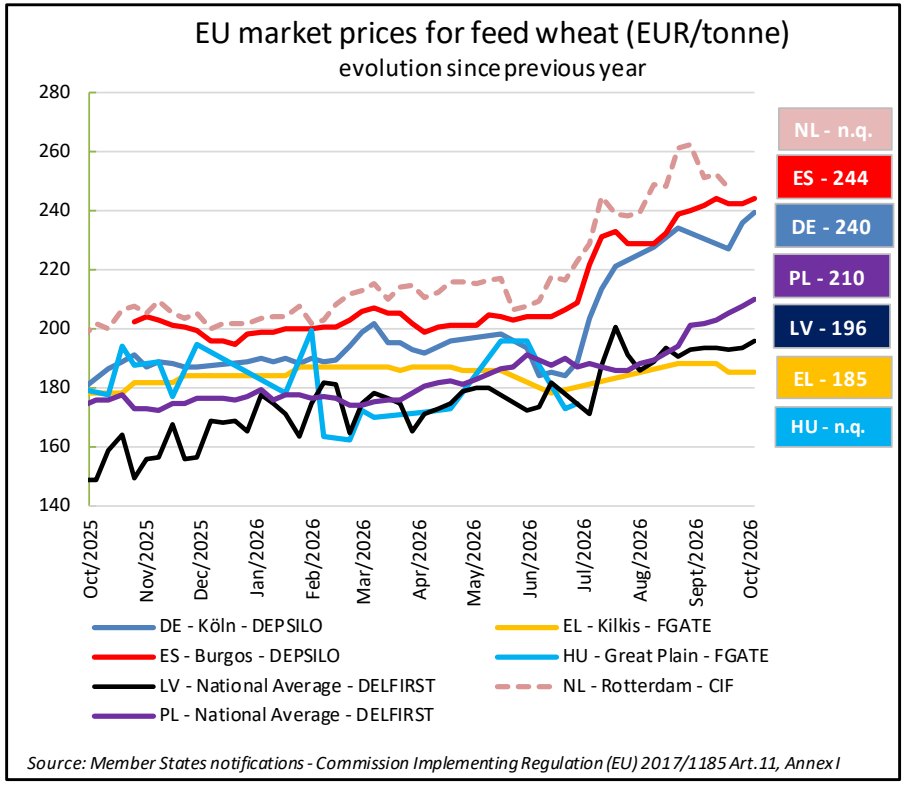
- EUR 250 per tonne; 4.7% month-on-month; 31.6% year-on-year

European Commission

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



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



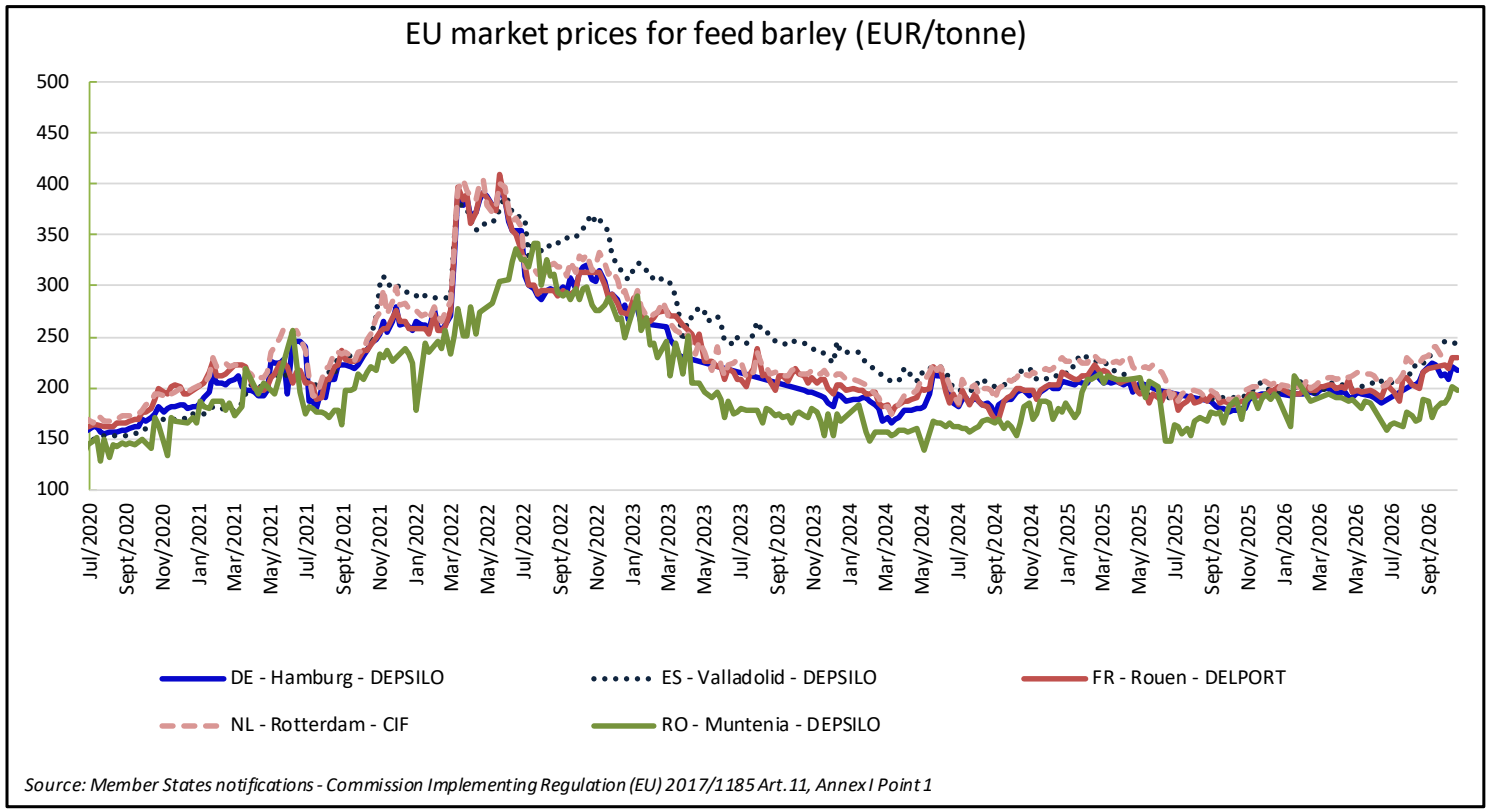
Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I

Poland
(DELFIRST – National average)

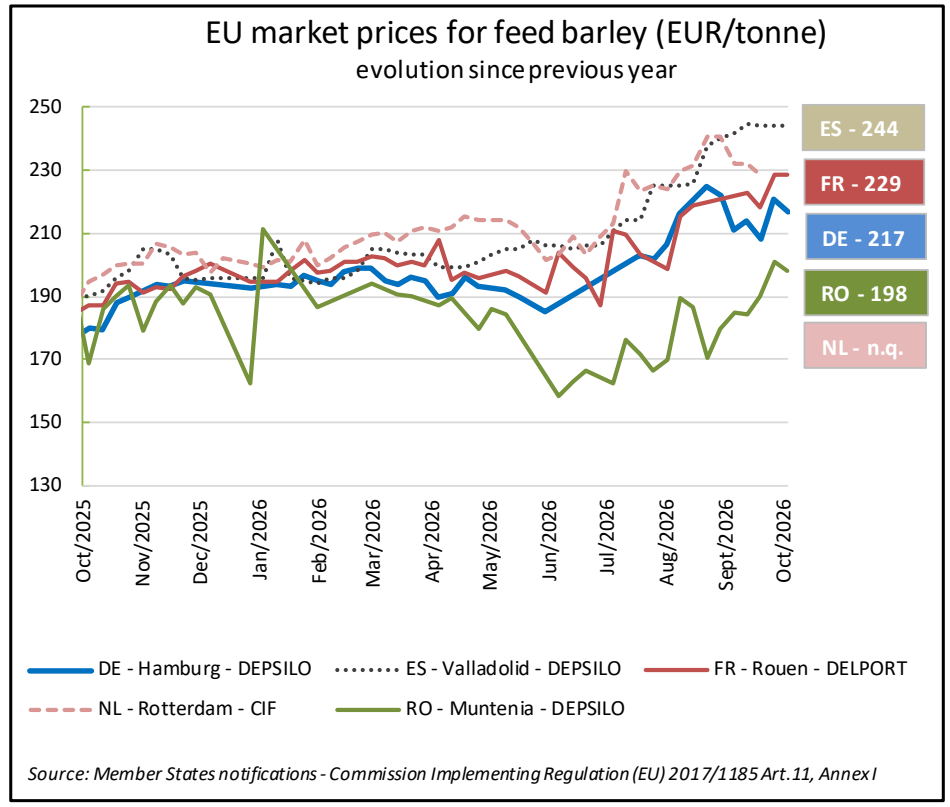
- EUR 210 per tonne; 4.0% month-on-month; 19.5% year-on-year

European Commission

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



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



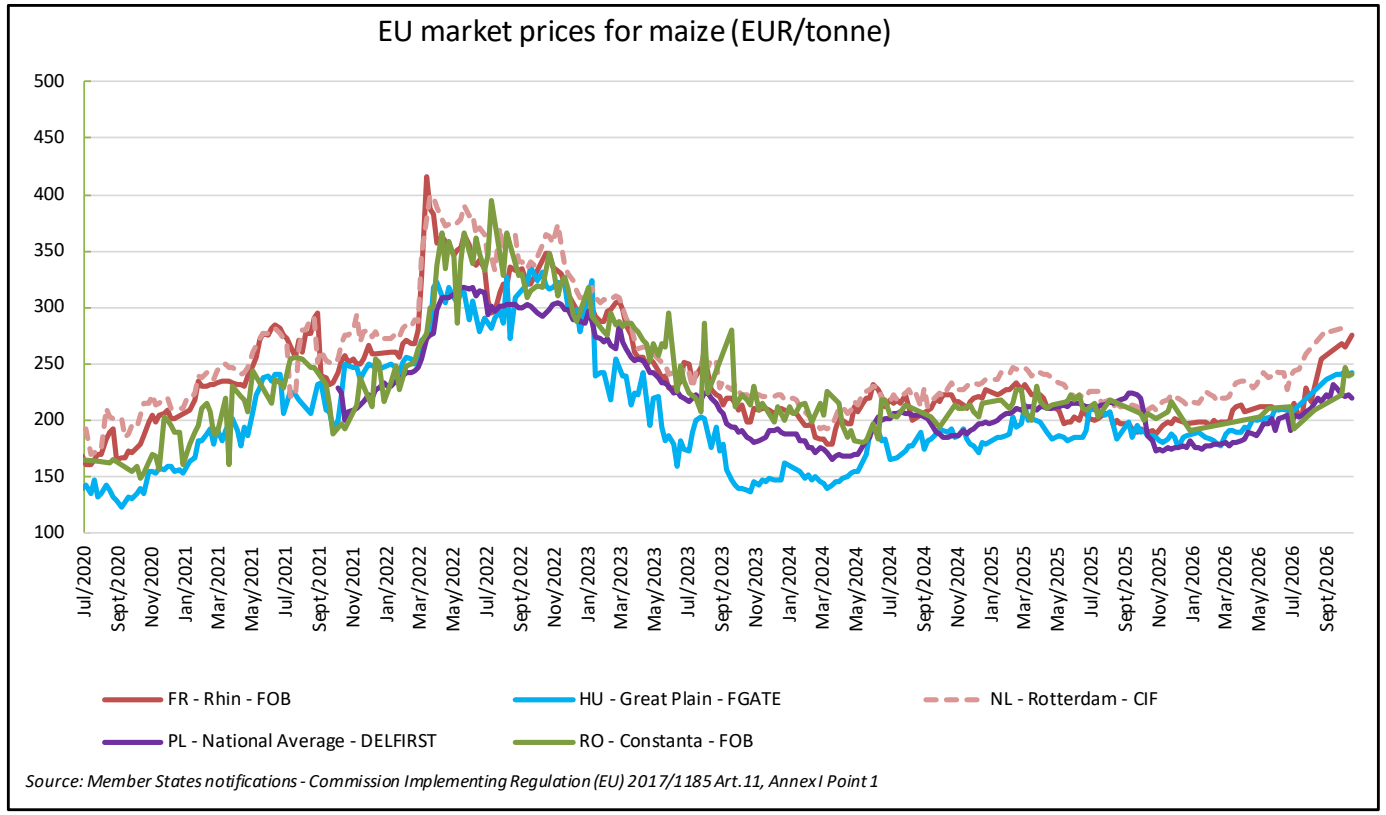
Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I

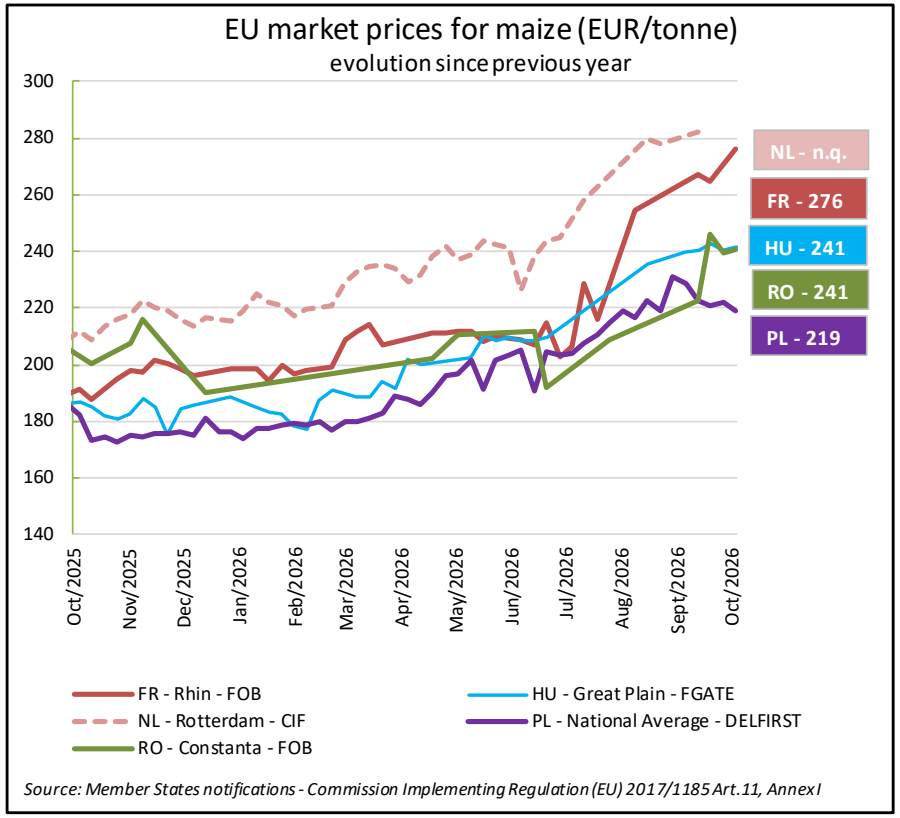
Germany
(DEPSILO Hamburg)

- EUR 217 per tonne; 2.8% month-on-month; 20.6% year-on-year

European Commission

EU market prices for maize – (EUR per tonne)



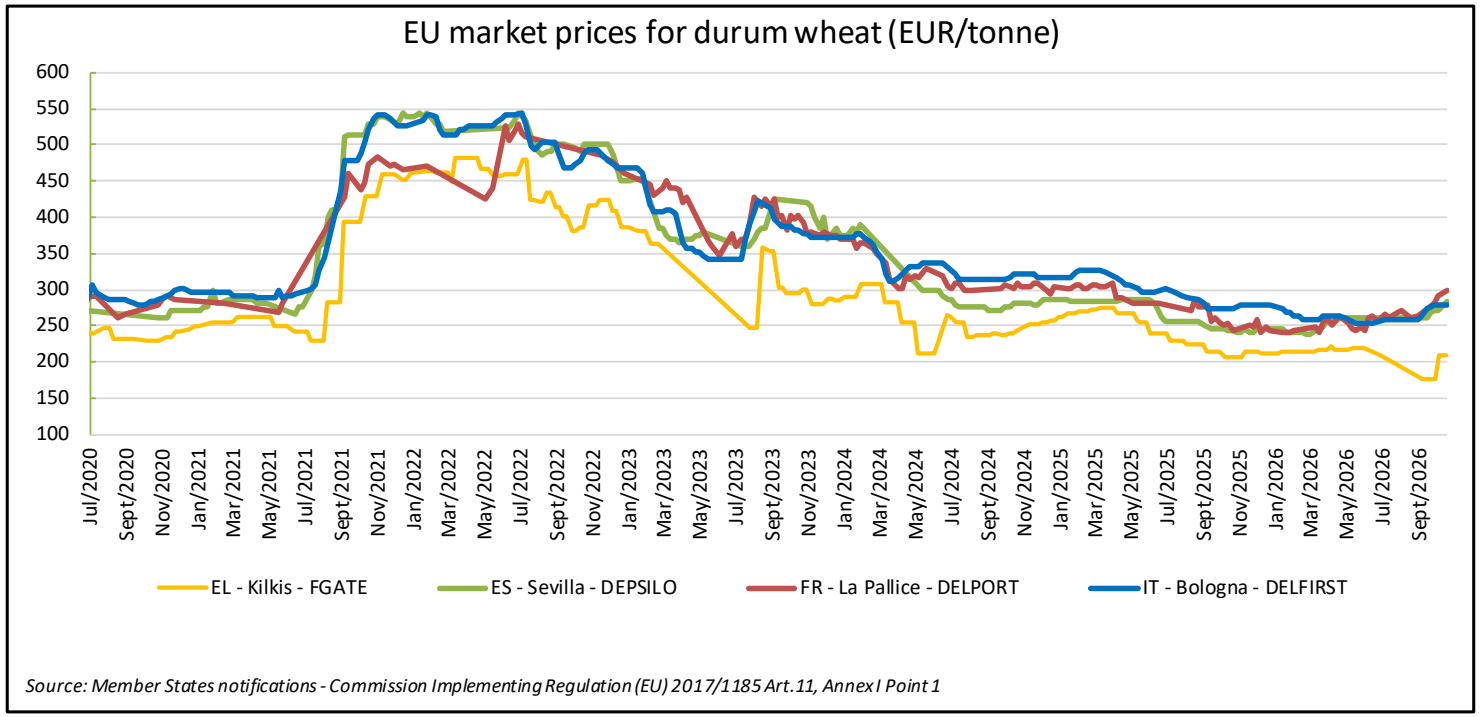


Poland (DELFIRST - National Average)

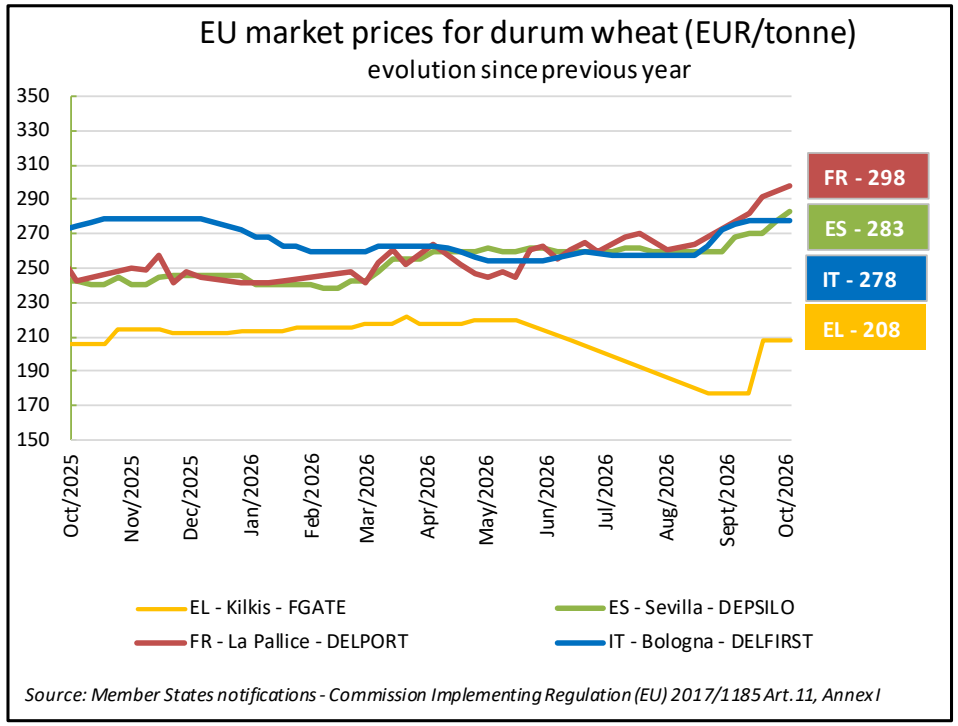
- EUR 219 per tonne; -4.1% month-on-month; 20.3% year-on-year

European Commission

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



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



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

Italy
(DELFIRST Bologna)

- EUR 278 per tonne; 0.7% month-on-month; 1.1% year-on-year

European Commission

Last month evolution of EU cereal prices

- EU representative cereal prices generally increased compared to last month (up to +4.7% for milling wheat). Polish maize price decreased by 4.1%.
- Cereal prices are generally higher than a year ago (from +1.1% for durum wheat to +31.6% for milling wheat).

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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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European Commission