



# Cereals market situation

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

*19 Dec 2024*

# 2024/2025 marketing year

# EU27 2024/2025 Area

(million ha)

	2023/24	2024/25			
	Forecast	Nov Projection	Dec Projection	vs. 2023/24 (%)	vs. 5-year av. (%)
Soft wheat	21.9	20.3	20.2	-7.6	-7.3
Durum wheat	2.3	2.1	2.1	-10.3	-4.8
Barley	10.4	10.4	10.4	-0.2	-1.8
Maize	8.3	8.9	8.9	7.2	-1.1
Rye	1.9	1.7	1.7	-7.9	-12.3
Oats	2.3	2.5	2.5	9.1	3.6
<b>Total</b>	<b>50.6</b>	<b>49.4</b>	<b>49.2</b>	<b>-2.8</b>	<b>-4.8</b>

Source: DG AGRI - E4

# EU27 2024/2025 Production

(million tonnes)

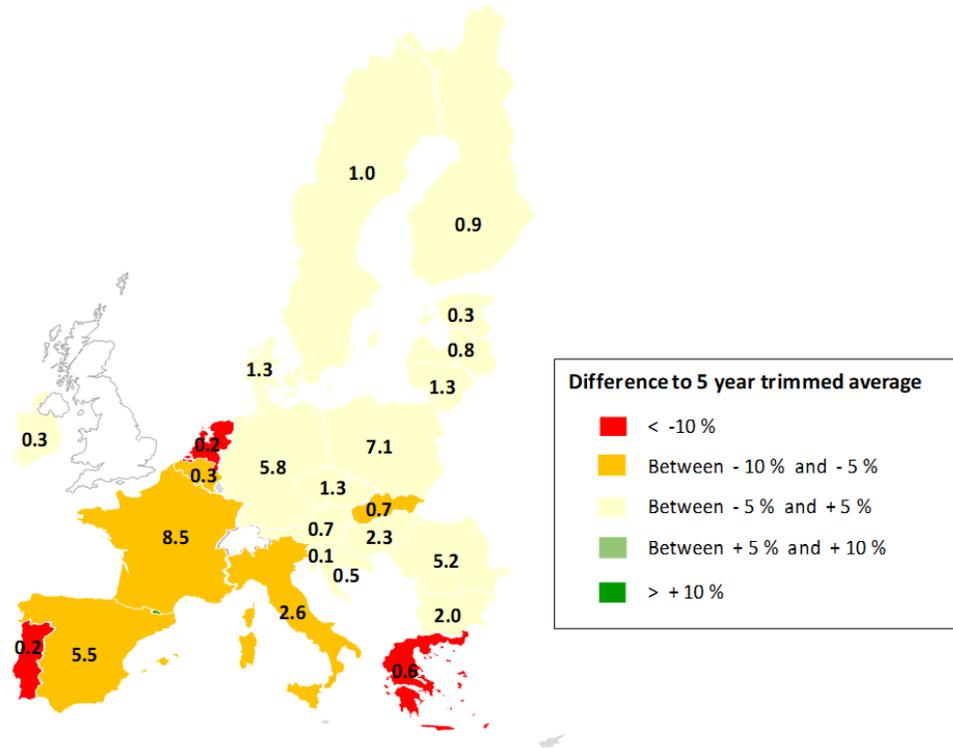
	2023/24	2024/25			
	Forecast	Nov Projection	Dec Projection	vs. 2023/24 (%)	vs. 5-year av. (%)
Soft wheat	125.2	112.3	111.9	-10.6	-11.7
Durum wheat	7.4	7.2	7.2	-2.7	-2.9
Barley	47.0	49.8	49.4	5.0	-5.5
Maize	61.2	59.6	59.5	-2.9	-10.2
Rye	7.4	6.9	6.9	-6.0	-11.1
Oats	5.8	8.0	7.8	33.3	7.8
<b>Total</b>	<b>267.8</b>	<b>256.9</b>	<b>255.8</b>	<b>-4.5</b>	<b>-8.8</b>

Source: DG AGRI - E4

# Total cereals 2024/25 - area

Nov 2024 Projection

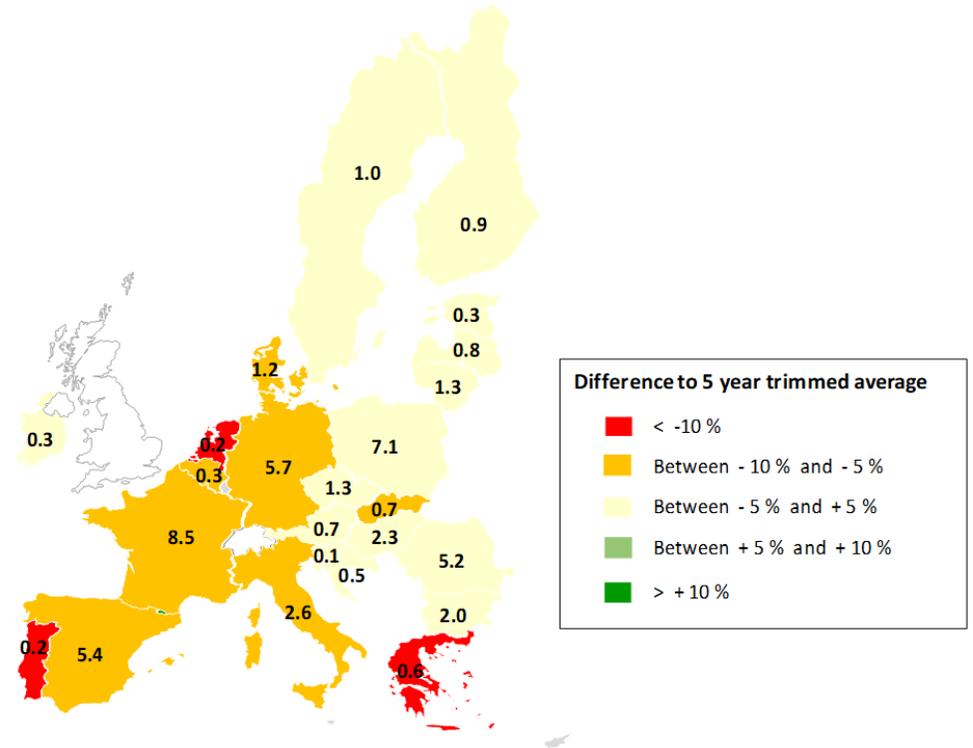
Total cereals area - 2024 projection (million hectares)



EU area: 49.4 million hectares - difference to 5 year trimmed average: -4.3%

Dec 2024 Projection

Total cereals area - 2024 projection (million hectares)

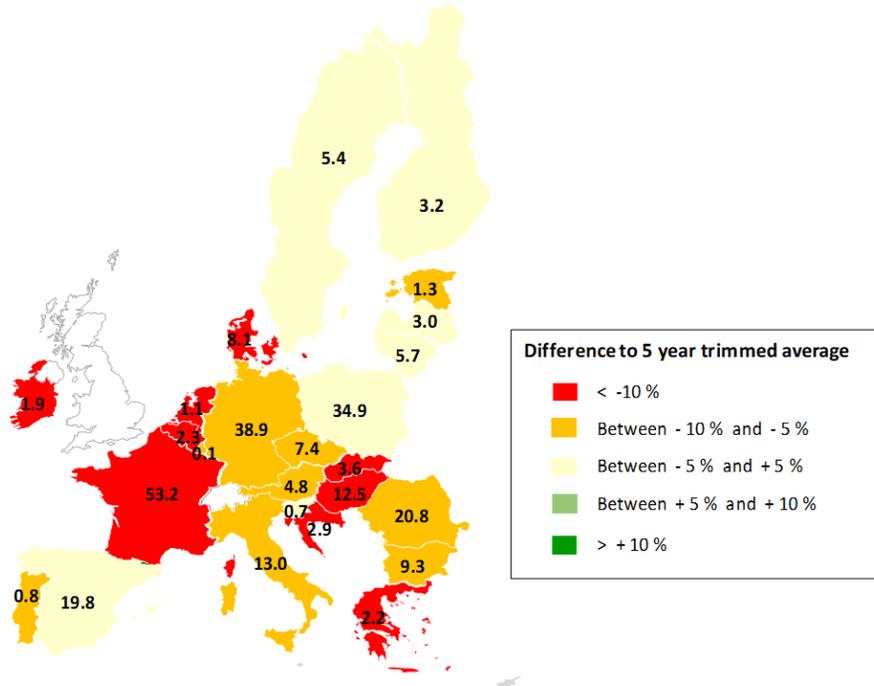


EU area: 49.2 million hectares - difference to 5 year trimmed average: -4.8%

# Total cereals 2024/25 - production

Nov 2024 Projection

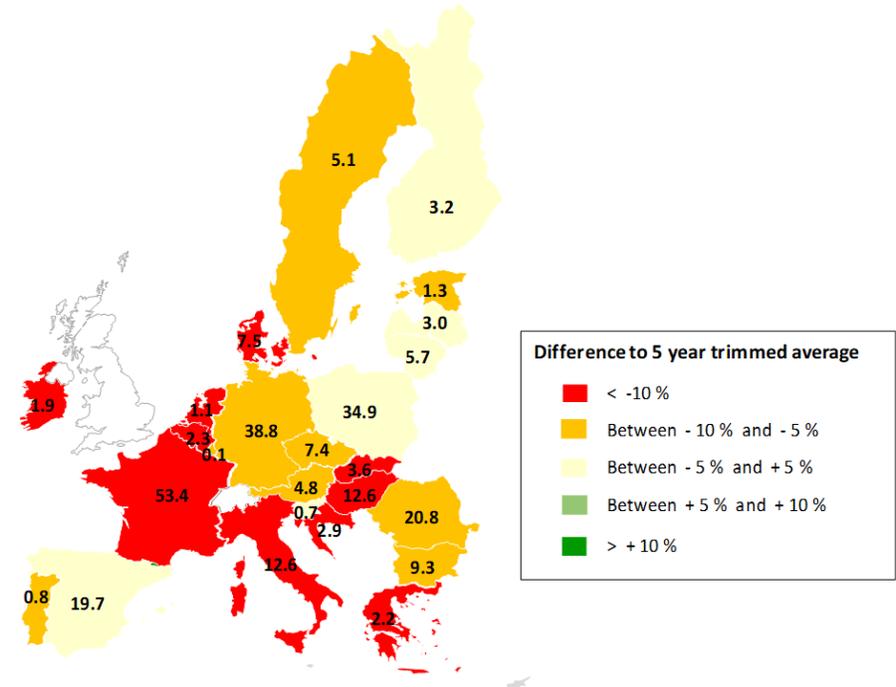
Total cereals production - 2024 projection (million tonnes)



EU production: 256.9 million tonnes - difference to 5 year trimmed average: -8.4%

Dec 2024 Projection

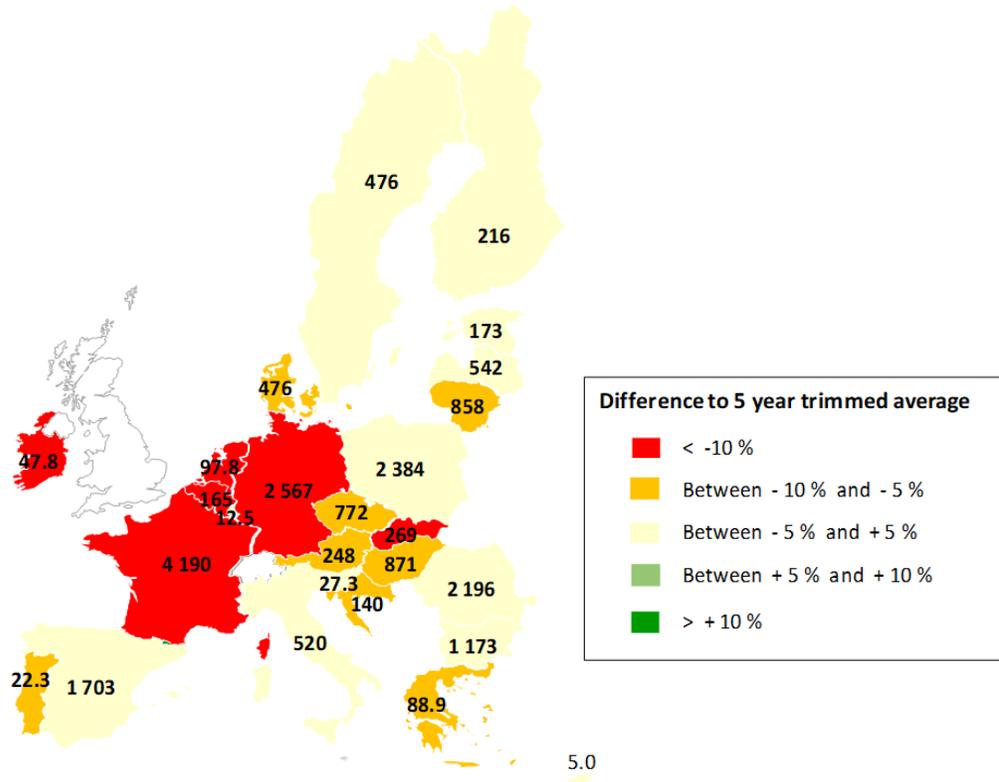
Total cereals production - 2024 projection (million tonnes)



EU production: 255.8 million tonnes - difference to 5 year trimmed average: -8.8%

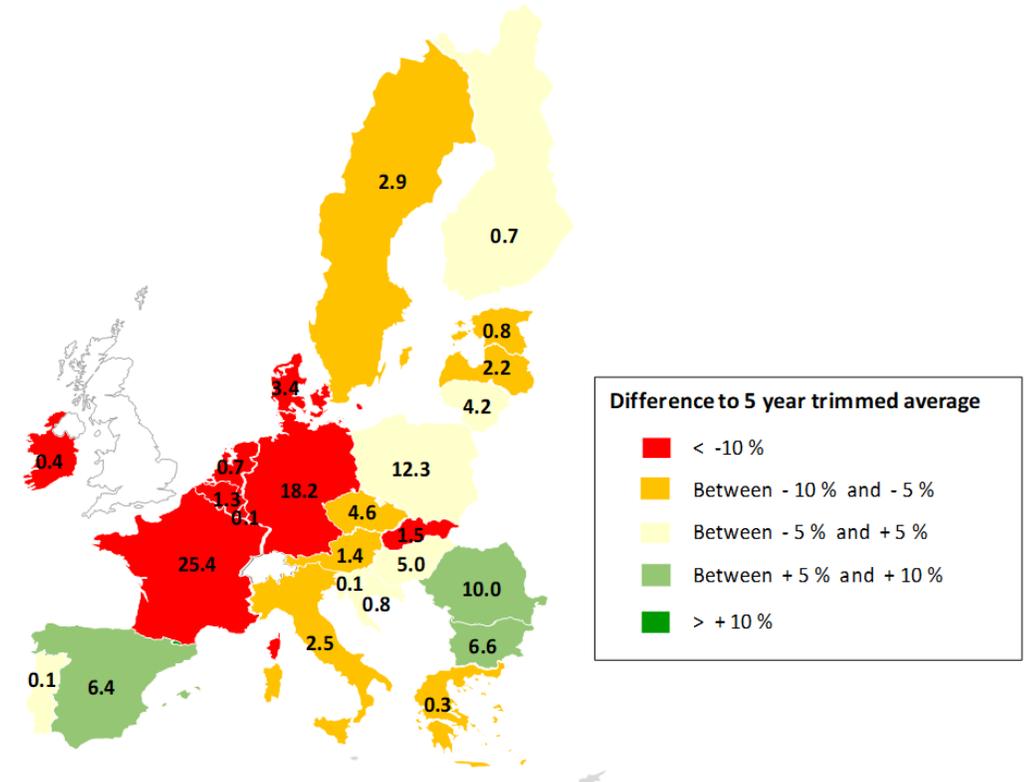
# Soft wheat 2024/25

Soft wheat area - 2024 projection (thousand hectares)



EU area: 20 239 thousand hectares - difference to 5 year trimmed average: -7.5%

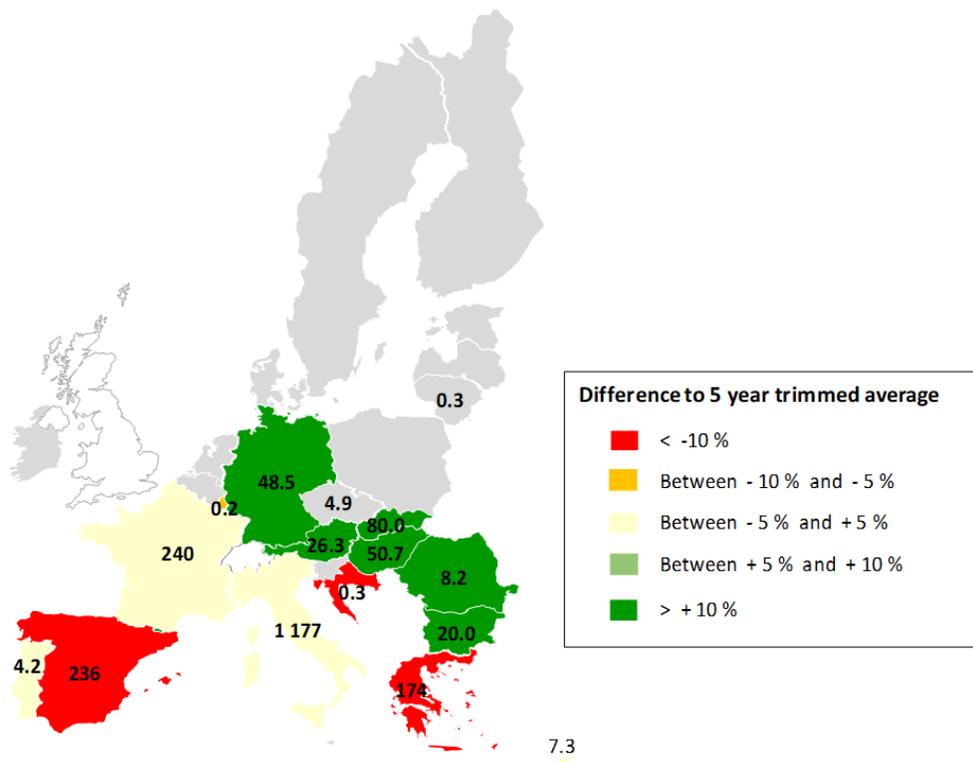
Soft wheat production - 2024 projection (million tonnes)



EU production: 111.9 million tonnes - difference to 5 year trimmed average: -11.7%

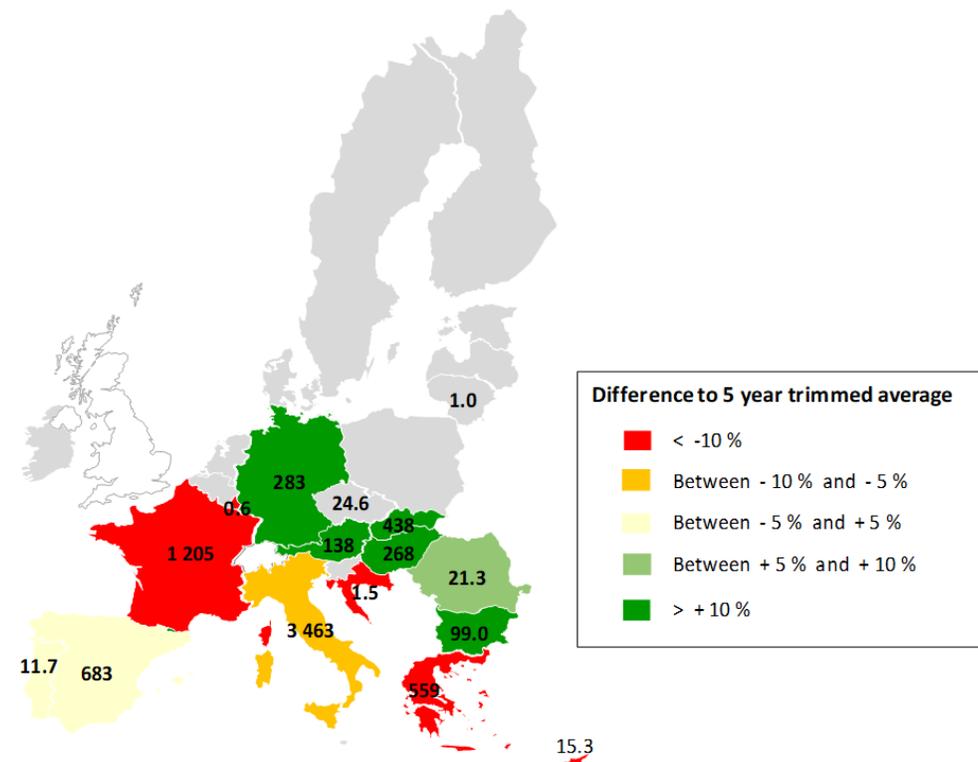
# Durum wheat 2024/25

Durum wheat area - 2024 projection (thousand hectares)



EU area: 2 078 thousand hectares - difference to 5 year trimmed average: -6.8%

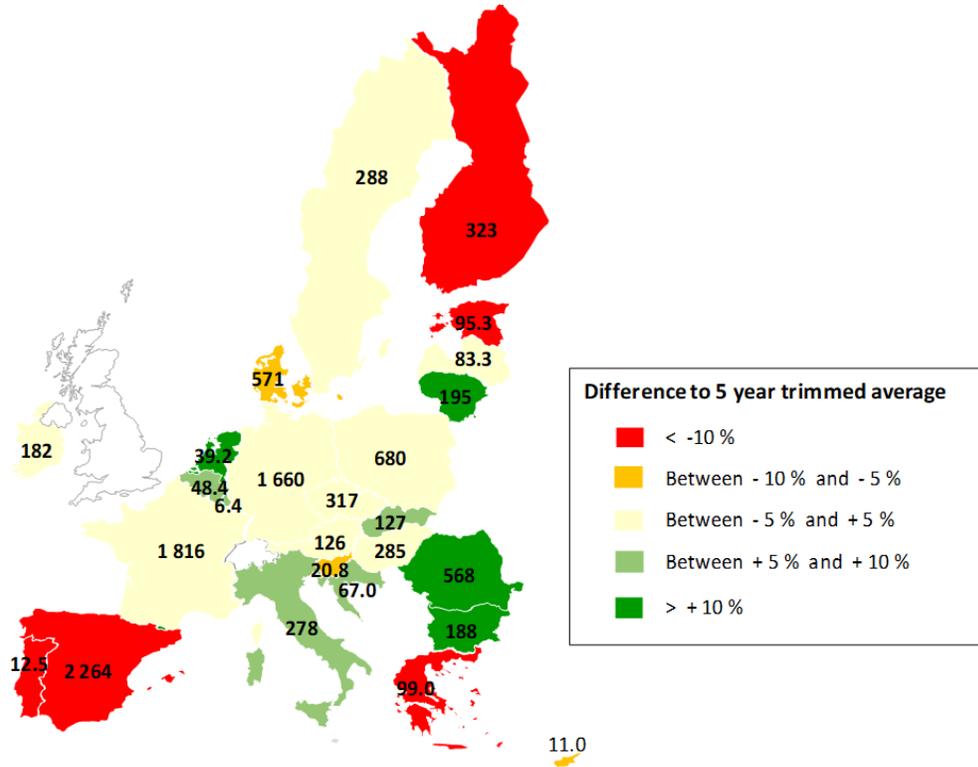
Durum wheat production - 2024 projection (thousand tonnes)



EU production: 7 213 thousand tonnes - difference to 5 year trimmed average: -2.9%

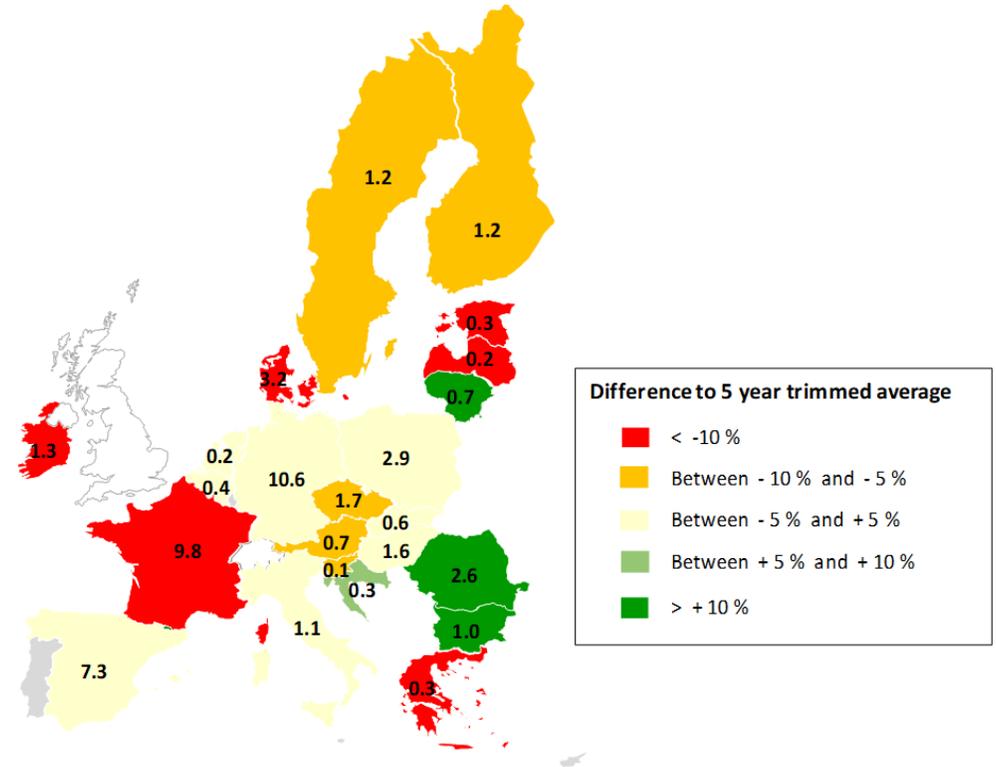
# Barley 2024/25

Barley area - 2024 projection (thousand hectares)



EU area: 10 350 thousand hectares - difference to 5 year trimmed average: -2%

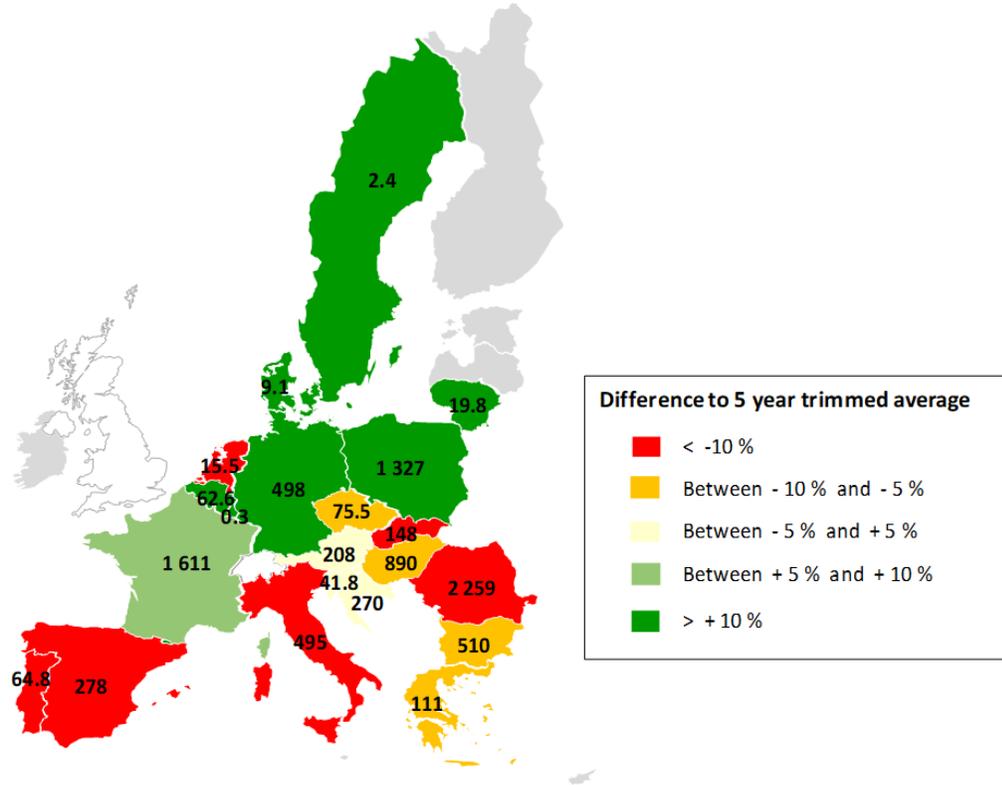
Barley production - 2024 projection (million tonnes)



EU production: 49.4 million tonnes - difference to 5 year trimmed average: -5.5%

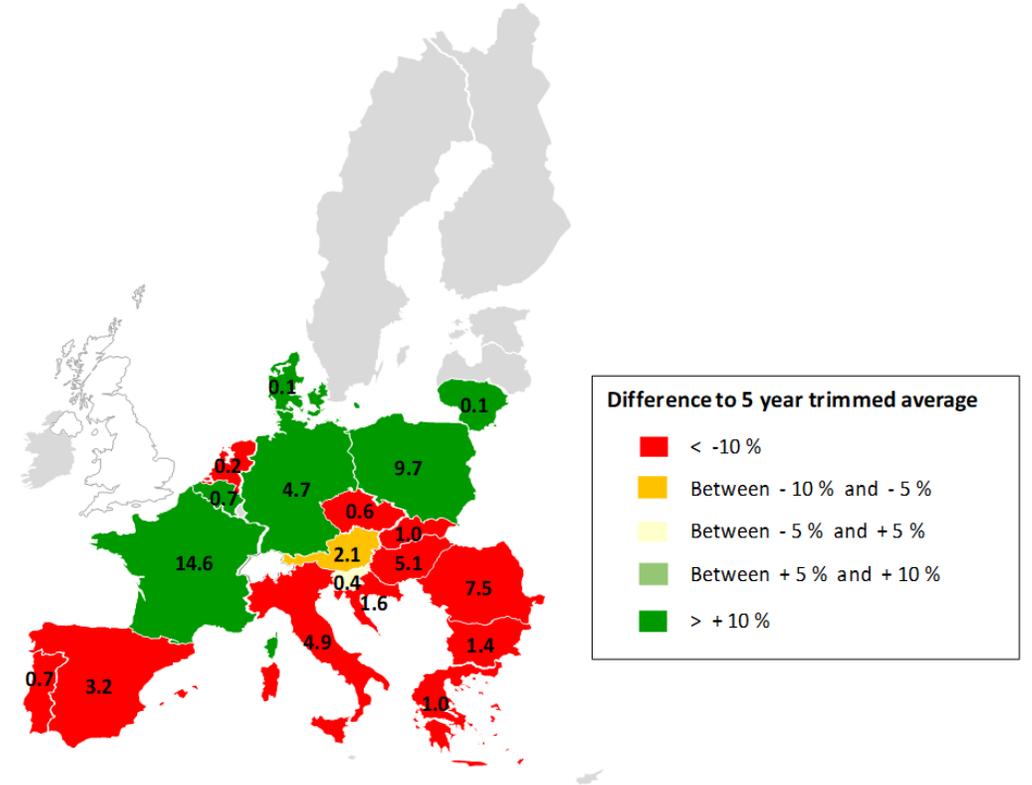
# Maize 2024/25

Maize area - 2024 projection (thousand hectares)



EU area: 8 897 thousand hectares - difference to 5 year trimmed average: -1.1%

Maize production - 2024 projection (million tonnes)



EU production: 59.5 million tonnes - difference to 5 year trimmed average: -10.2%

# EU 2024/2025 Usable Production: comparison with other forecasters

*(million tonnes)*

	EC DG AGRI 19-December	Stratégie Grains 16-December	COCERAL 10-December	COPA COGECA 10-July
Soft Wheat	111.9	114.5	114.2	117.5
Durum Wheat	7.2	7.5	7.6	6.9
Barley	49.4	50.3	50.4	43.0
Maize	59.5	58.0	60.1	62.4
Rye	6.9	7.0	7.1	
<b>Total Cereals</b>	<b>255.8</b>		<b>259.8</b>	<b>257.3</b>

# 2024/2025 – Production evolution

	month/month variation	year/year variation	vs. 5-year average
<i>France</i>	0.5%	-17.0%	-16.3%
<i>Germany</i>	-0.1%	-7.7%	-9.0%
<i>Poland</i>	0.0%	-1.6%	0.0%
<i>Romania</i>	0.0%	0.6%	-7.0%
<i>Spain</i>	-0.2%	77.2%	-2.9%
<i>Hungary</i>	0.2%	-16.0%	-15.1%
<i>Italy</i>	-3.7%	-8.5%	-12.3%

*\*: 75% of the EU production*

*Source: DG AGRI - E4*

# 2024/2025 – 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	20 239	165	1 173	772	476	2 567	173	48	89	1 703	4 190	140	520	5	542	858	13	871	98	248	2 384	22	2 196	27	269	216	476
	Yield	5.57	7.77	5.68	6.01	7.12	7.15	4.36	8.22	2.98	3.79	6.10	6.00	4.93	1.80	4.15	4.94	5.28	5.82	7.17	5.76	5.18	2.35	4.61	5.40	5.54	3.51	6.14
	Production	112 736	1 283	6 659	4 634	3 389	18 357	756	393	264	6 446	25 555	839	2 563	9	2 251	4 234	66	5 068	701	1 427	12 348	52	10 127	147	1 492	756	2 920
Durum wheat	Area	2 078	0	20	5	0	49	0	0	174	236	240	0	1 177	7	0	0	0	51	0	26	0	4	8	0	80	0	0
	Yield	3.51		5.00	5.08		5.90			3.25	2.92	5.08	5.00	2.97	2.14		3.33	3.71	5.34		5.31		2.79	2.64		5.54		
	Production	7 289	0	100	25	0	286	0	0	565	690	1 217	2	3 500	16	0	1	1	271	0	139	0	12	22	0	443	0	0
Barley	Area	10 350	48	188	317	571	1 660	95	182	99	2 264	1 816	67	278	11	83	195	6	285	39	126	680	13	568	21	127	323	288
	Yield	4.81	7.43	5.42	5.28	5.57	6.45	3.47	7.26	2.61	3.26	5.43	5.00	3.94	1.75	2.92	3.78	5.12	5.53	6.17	5.70	4.33	3.23	4.61	4.83	4.78	3.61	4.35
	Production	49 822	360	1 019	1 676	3 185	10 705	331	1 319	258	7 389	9 853	335	1 098	19	244	737	33	1 576	242	716	2 947	40	2 619	100	606	1 164	1 253
Grain maize	Area	8 897	63	510	75	9	498	0	0	111	278	1 611	270	495	0	0	20	0	890	16	208	1 327	65	2 259	42	148	0	2
	Yield	6.71	10.60	2.75	7.48	7.13	9.54			9.33	11.70	9.08	6.10	9.94			6.20	6.58	5.75	11.76	9.90	7.31	10.09	3.35	9.03	6.63		7.43
	Production	59 719	664	1 400	565	65	4 755	0	0	1 031	3 256	14 624	1 647	4 925	0	0	123	2	5 115	182	2 059	9 701	654	7 576	377	982	0	18
Rye	Area	1 712	1	6	24	112	526	18	0	7	99	29	2	4	0	34	26	1	23	2	32	691	13	11	1	8	16	27
	Yield	4.15	4.00	2.33	4.21	5.91	5.19	3.99		2.10	2.22	3.81	3.18	3.14		3.90	2.79	4.94	3.22	3.20	3.98	3.56	1.01	2.91	4.08	3.28	2.74	5.81
	Production	7 098	3	15	102	662	2 729	73	0	16	219	111	5	12	0	131	73	7	72	5	128	2 461	13	31	4	27	44	157
Oats	Area	2 516	3	25	53	52	156	48	30	59	515	79	16	95	0	108	111	1	25	1	17	524	20	78	1	12	329	157
	Yield	3.12	4.61	2.20	3.90	4.98	4.48	3.11	7.78	1.24	2.23	3.87	2.88	2.20	1.15	2.88	2.40	4.27	3.10	4.95	3.87	3.17	1.23	2.36	3.18	2.66	3.68	3.89
	Production	7 858	15	55	205	259	700	150	232	73	1 149	304	46	209	0	310	266	5	79	7	68	1 661	24	185	2	33	1 213	611
Sorghum	Area	229	0	6	0	0	0	0	0	2	4	102	0	41	0	0	0	0	45	0	6	0	0	16	0	8	0	0
	Yield	4.84		2.33						3.49	4.29	5.10		6.01					5.00		6.63			1.36	3.83	2.86		
	Production	1 109	0	14	0	0	0	0	0	7	17	520	0	244	0	0	0	0	225	0	36	0	0	22	0	23	0	0
Triticale	Area	2 372	4	19	44	4	266	6	0	13	244	255	7	14	1	7	83	5	57	1	51	1 156	13	74	5	13	7	25
	Yield	4.31	5.95	3.93	4.66	6.45	5.84	5.20		2.26	2.65	4.31	4.57	4.46	1.85	4.17	3.23	5.57	4.12	4.93	5.08	4.40	1.44	4.22	4.71	2.78	3.67	4.96
	Production	10 222	24	75	205	25	1 552	33	0	29	646	1 097	32	64	1	27	268	27	233	4	257	5 084	19	312	23	37	24	124
Other cereals	Area	817	1	4	6	6	26	8	0	1	43	180	1	18	0	22	47	0	13	1	12	386	1	4	5	2	18	12
	Yield	2.70	3.80	1.81	1.80	3.09	4.40	1.26		1.55	2.29	3.21	0.88	2.82		1.20	1.30	4.72	1.57	0.00	2.64	2.75	0.97	1.05	0.65	0.99	3.59	2.89
	Production	2 210	4	7	10	18	116	10	0	2	98	578	1	52	0	26	61	2	21	0	33	1 063	1	4	3	2	66	34
Total cereals	Area	49 211	285	1 951	1 296	1 230	5 748	350	259	554	5 386	8 501	503	2 643	24	795	1 340	27	2 259	157	726	7 149	150	5 214	101	668	908	986
	Yield	5.24	8.25	4.79	5.73	6.18	6.82	3.87	7.50	4.05	3.70	6.34	5.78	4.79	1.87	3.76	4.30	5.22	5.60	7.27	6.70	4.93	5.42	4.01	6.50	5.45	3.59	5.19
	Production	258 064	2 353	9 344	7 423	7 602	39 200	1 353	1 943	2 245	19 910	53 859	2 906	12 665	45	2 989	5 762	141	12 659	1 141	4 864	35 265	816	20 897	658	3 645	3 266	5 115

MAJ 20241219

# EU 2024/2025 Cereals Balance Sheet

(thousand metric tonnes)

last updated: 19/12/2024

	2024/25 proj.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
<b>Beginning stocks</b>	17 193	3 638	752	19 405	729	150	742	1 275	198	44 082
Usable production	111 857	49 399	7 213	59 468	6 942	1 054	7 772	10 018	2 106	255 828
Area (thousand ha)	20 239	10 350	2 078	8 897	1 712	229	2 516	2 372	817	49 211
Yield (tonnes/ha)	6	5	3	7	4	5	3	4	3	5
Imports (from third countries)	7 000	1 300	3 020	19 500	129	47	125	1	155	31 278
<b>Total supply</b>	<b>136 050</b>	<b>54 337</b>	<b>10 984</b>	<b>98 374</b>	<b>7 800</b>	<b>1 251</b>	<b>8 639</b>	<b>11 294</b>	<b>2 459</b>	<b>331 187</b>
Total domestic use	101 636	42 092	9 001	76 110	7 573	909	6 424	11 057	2 241	257 044
Human consumption	41 665	365	8 163	4 751	3 080	156	1 112	52	23	59 367
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 200	6 800	95	12 000	1 500		101	445	170	30 310
<i>of which bioethanol/biofuel</i>	3 400	537		6 900	900			344	14	12 095
Animal feed	45 500	32 500	300	58 600	2 652	718	4 814	10 000	1 766	156 850
Losses	671	296	43	357	42	6	47	60	13	1 535
Exports (to third countries)	25 000	10 000	720	3 000	200	15	159	5	18	39 116
<b>Total use</b>	<b>126 636</b>	<b>52 092</b>	<b>9 721</b>	<b>79 110</b>	<b>7 774</b>	<b>924</b>	<b>6 583</b>	<b>11 062</b>	<b>2 260</b>	<b>296 160</b>
<b>Ending stocks**</b>	<b>9 414</b>	<b>2 245</b>	<b>1 264</b>	<b>19 264</b>	<b>26</b>	<b>327</b>	<b>2 057</b>	<b>232</b>	<b>199</b>	<b>35 027</b>
<b>Change in stocks**</b>	<b>-7 779</b>	<b>-1 393</b>	<b>512</b>	<b>-142</b>	<b>-703</b>	<b>177</b>	<b>1 314</b>	<b>-1 043</b>	<b>2</b>	<b>-9 054</b>

\* Marketing year: from July to June

\*\* At the end of the marketing year

# TAXUD Surveillance data

Customs Surveillance (tonnes)	EU 01/07/2024 - 15/12/2024				EU 01/07/2023 - 17/12/2023		EU 01/07/2022 - 18/12/2022	
	Export	Y/Y variation	Import	Y/Y variation	Export	Import	Export	Import
	Common wheat	10 536 321	↓ -31%	4 247 199	↑ +1%	15 171 383	4 197 211	16 536 852
Common wheat flour (grain equivalent)	168 975	↓ -24%	131 907	↓ -13%	221 969	151 100	224 305	127 742
Durum wheat	220 713	↓ -6%	659 890	↓ -59%	233 713	1 611 832	385 914	565 141
Durum wheat meal (grain equivalent)	75 994	↓ -23%	1 579	▬ +0%	98 926	1 578	77 749	1 687
<b>Total Wheat</b>	<b>11 002 003</b>	<b>↓ -30%</b>	<b>5 040 575</b>	<b>↓ -15%</b>	<b>15 725 992</b>	<b>5 961 721</b>	<b>17 224 820</b>	<b>4 565 730</b>
Barley	2 091 486	↓ -34%	654 503	↓ -43%	3 185 832	1 148 515	2 911 393	1 128 794
Malt (grain equivalent)	1 413 414	▬ +1%	9 165	↓ -59%	1 404 290	22 462	1 492 403	12 111
Maize	888 072	↓ -52%	9 174 887	↑ +10%	1 843 154	8 338 051	643 311	13 582 563
Rye	42 731	↓ -34%	7 274	↓ -91%	64 992	78 477	70 125	45 275
Oats	39 375	↑ +13%	6 012	↓ -90%	34 787	58 073	26 389	87 966
Sorghum	5 062	↑ +54%	9 403	↑ +31%	3 287	7 151	4 566	19 201
<b>Total Coarse grains</b>	<b>4 480 140</b>	<b>↓ -31%</b>	<b>9 861 245</b>	<b>↑ +2%</b>	<b>6 536 343</b>	<b>9 652 731</b>	<b>5 148 186</b>	<b>14 875 911</b>
<b>General Total</b>	<b>15 482 143</b>	<b>↓ -30%</b>	<b>14 901 820</b>	<b>↓ -5%</b>	<b>22 262 334</b>	<b>15 614 451</b>	<b>22 373 006</b>	<b>19 441 641</b>

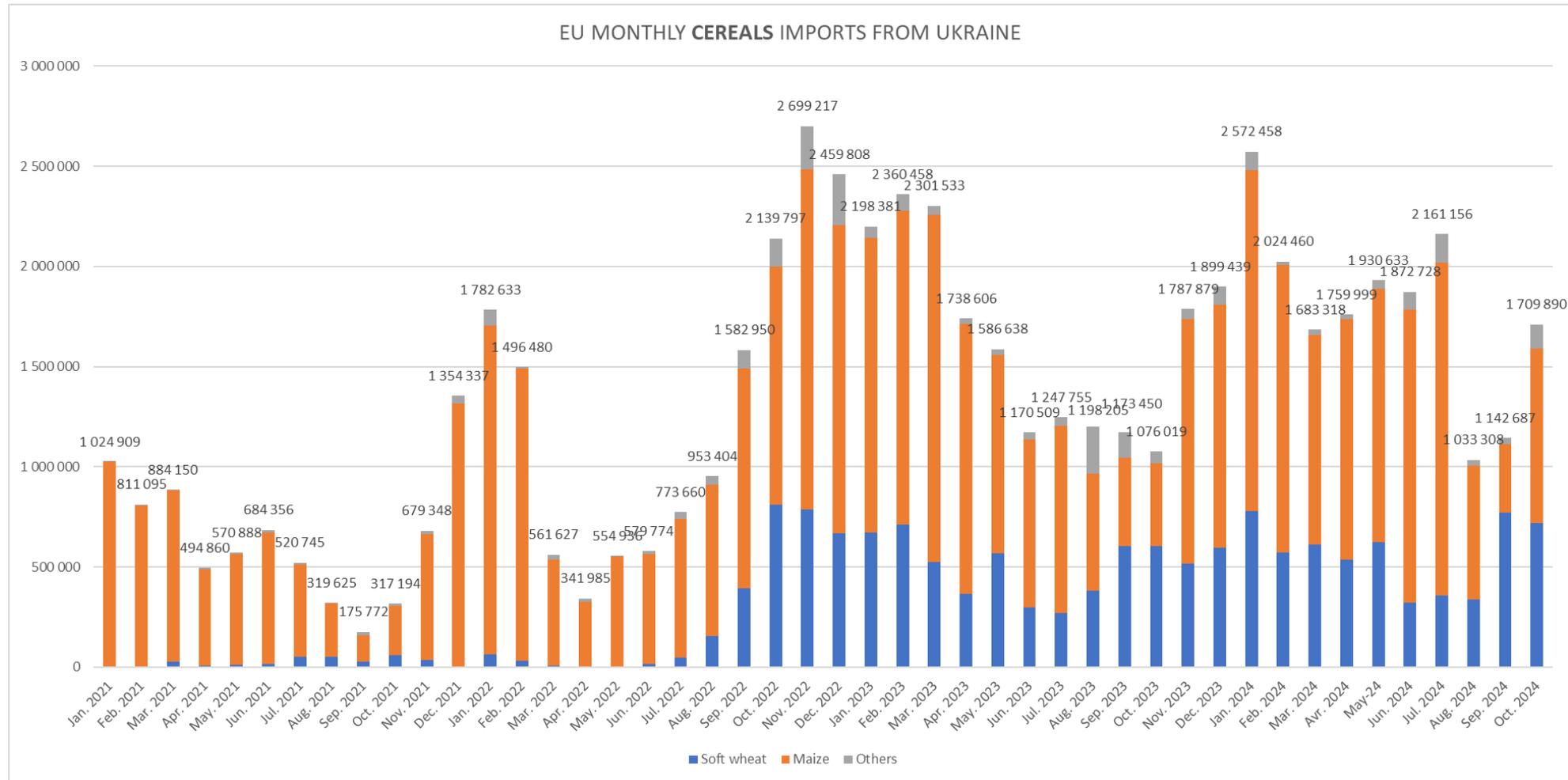
# EU Cereals Balance Sheet 2024/2025 (Summary)

- Total **EU cereals production** is forecast at **255.8 million tonnes** (-1.1 million tonnes compared to November). It is 8.8% below the five-year trimmed average and -4.5 % year-on-year.
- **Soft wheat** and **barley** productions were revised down by 0.4 million tonnes each and **maize** by 0.1 million tonnes.
- **Trade** projections are unchanged.

# Focus on EU imports from Ukraine

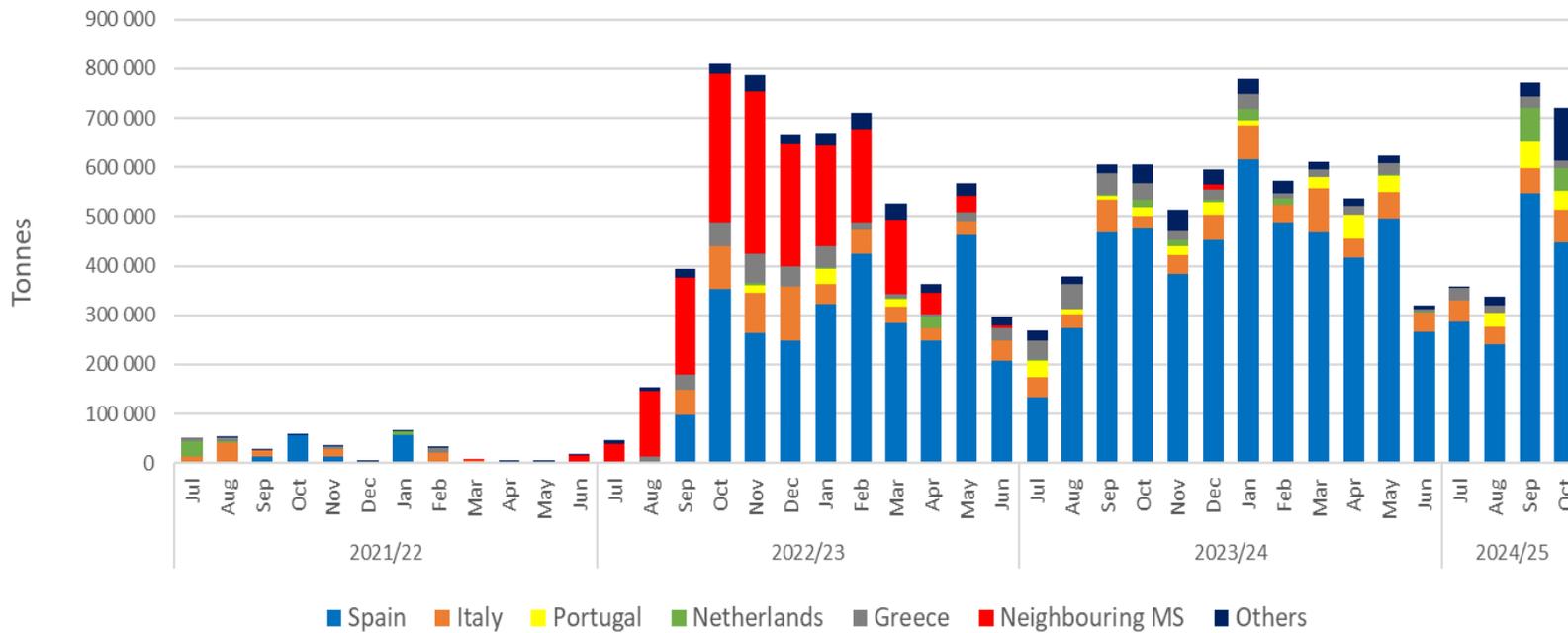
# EU monthly cereals imports from Ukraine since January 2021 (in tonnes)

– source COMEXT

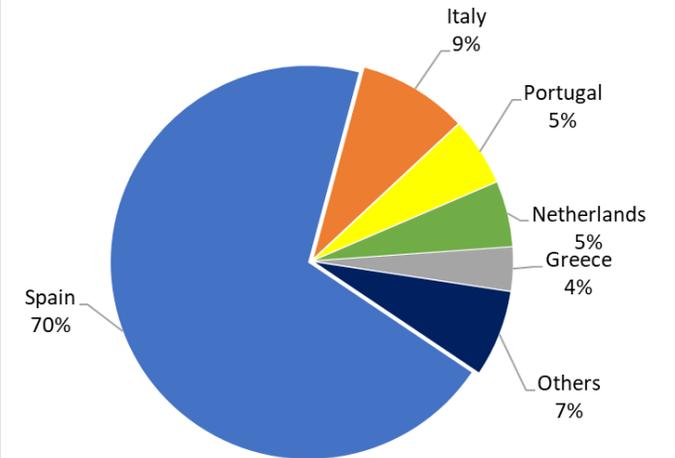


# EU imports from Ukraine - wheat

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



WHEAT imports from Ukraine  
share of the main importing Member States

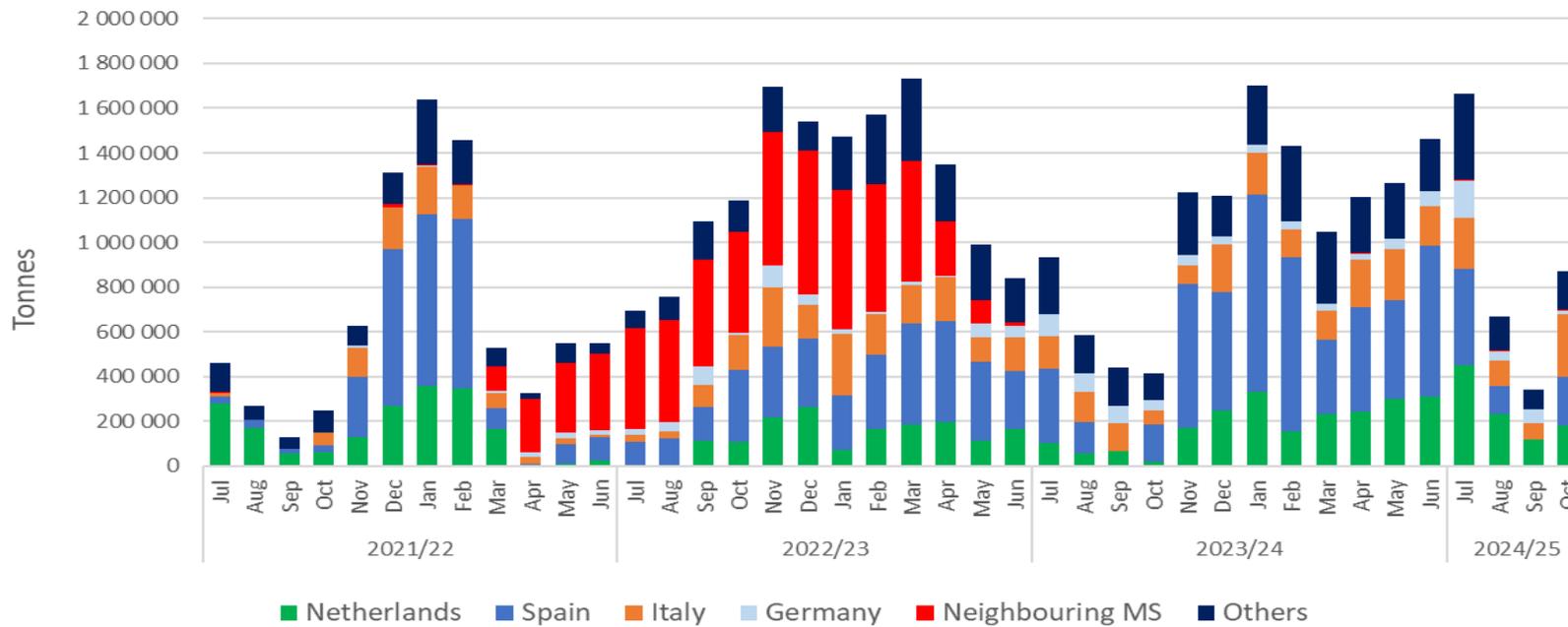


Source: Eurostat/Comext; share based on import data for the period July - October 2024

Source: Eurostat/Comext

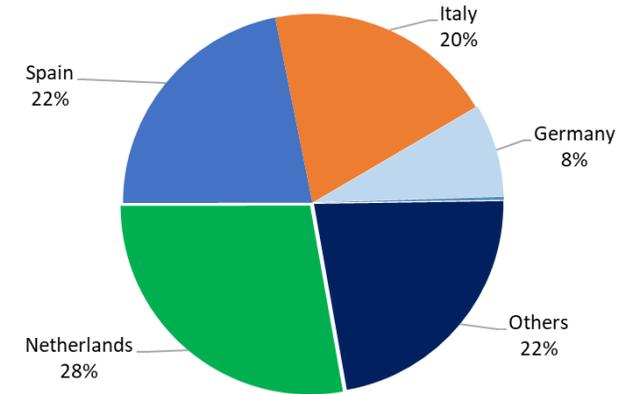
# EU imports from Ukraine - maize

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



Source: Eurostat/Comext

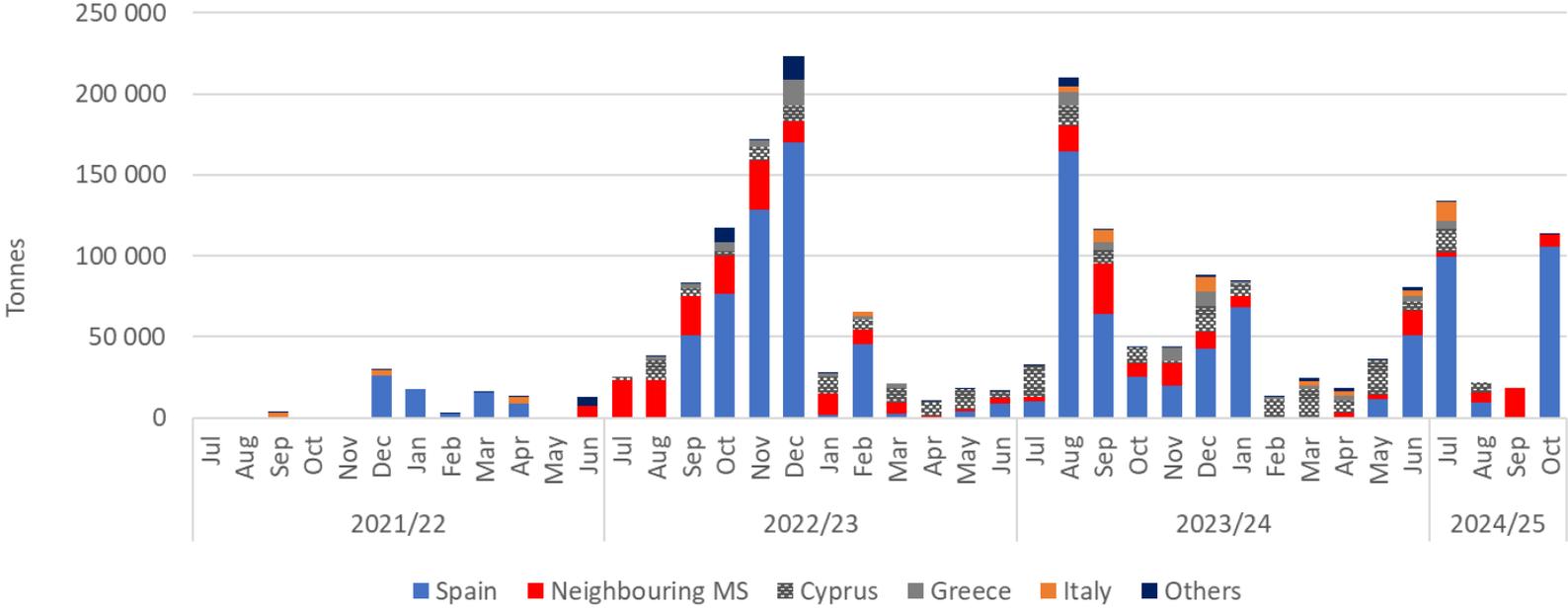
MAIZE imports from Ukraine  
share of the main importing Member States



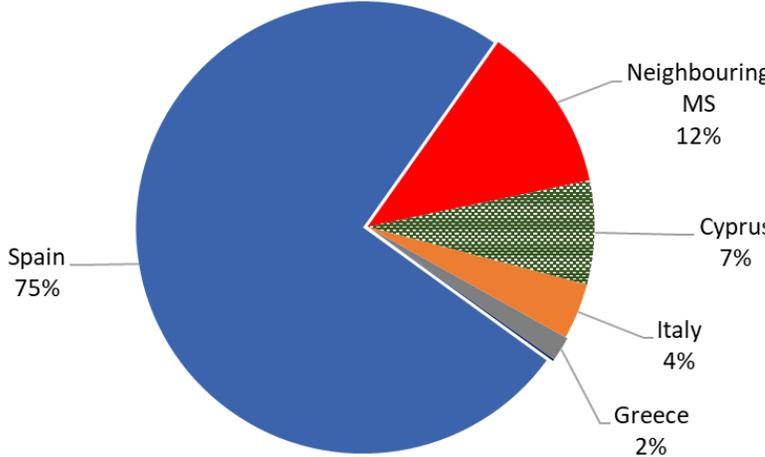
Source: Eurostat/Comext; share based on import data for the period July - October 2024

# EU imports from Ukraine - barley

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



BARLEY imports from Ukraine  
share of the main importing Member States



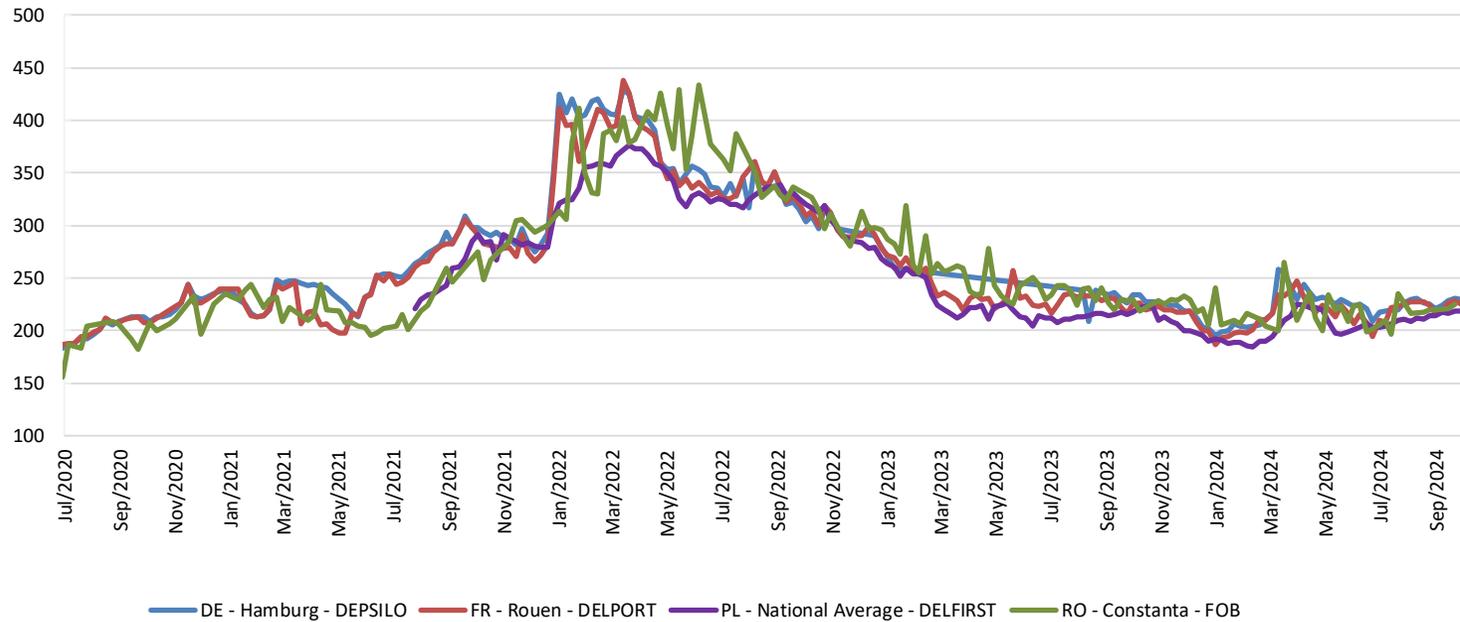
Source: Eurostat/Comext; share based on import data for the period July - October 2024

Source: Eurostat/Comext

# EU cereals market prices

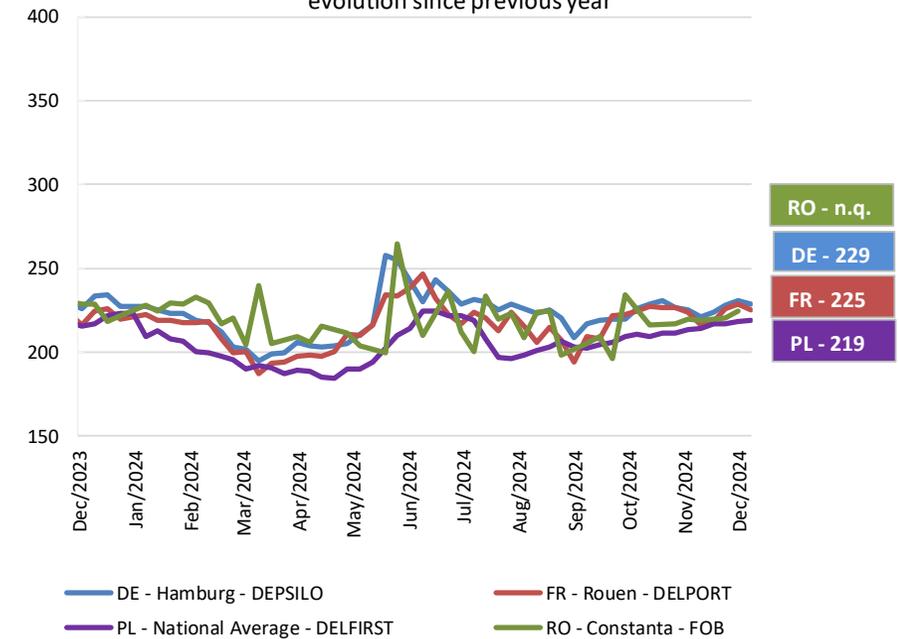
# EU market prices for milling wheat – (EUR per tonne)

EU market prices for milling wheat (EUR/tonne)



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

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

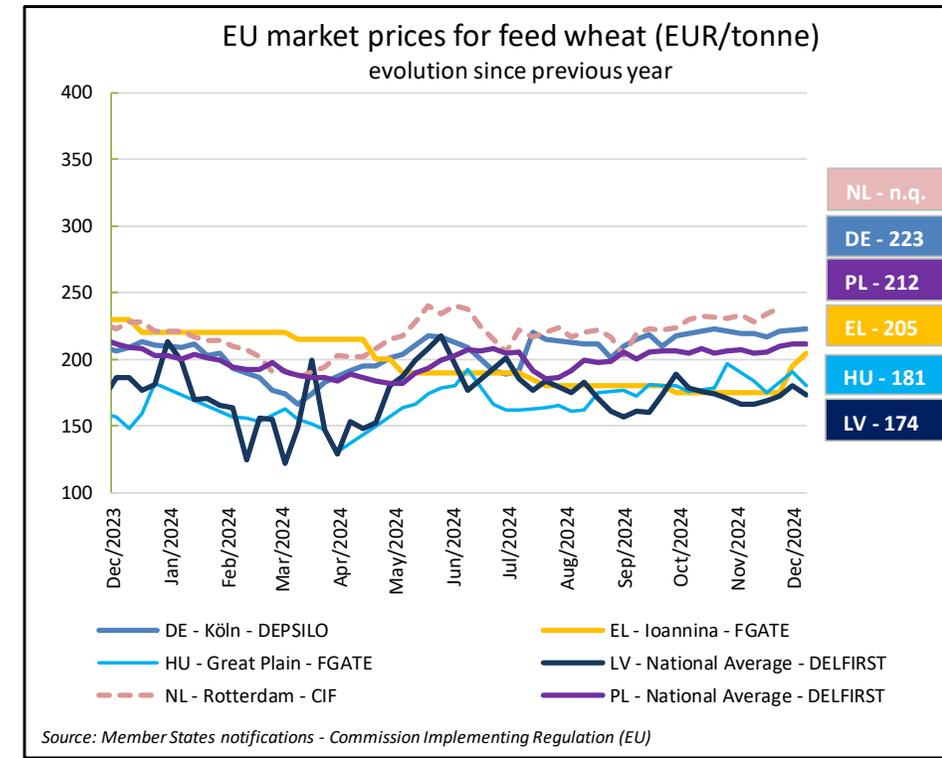
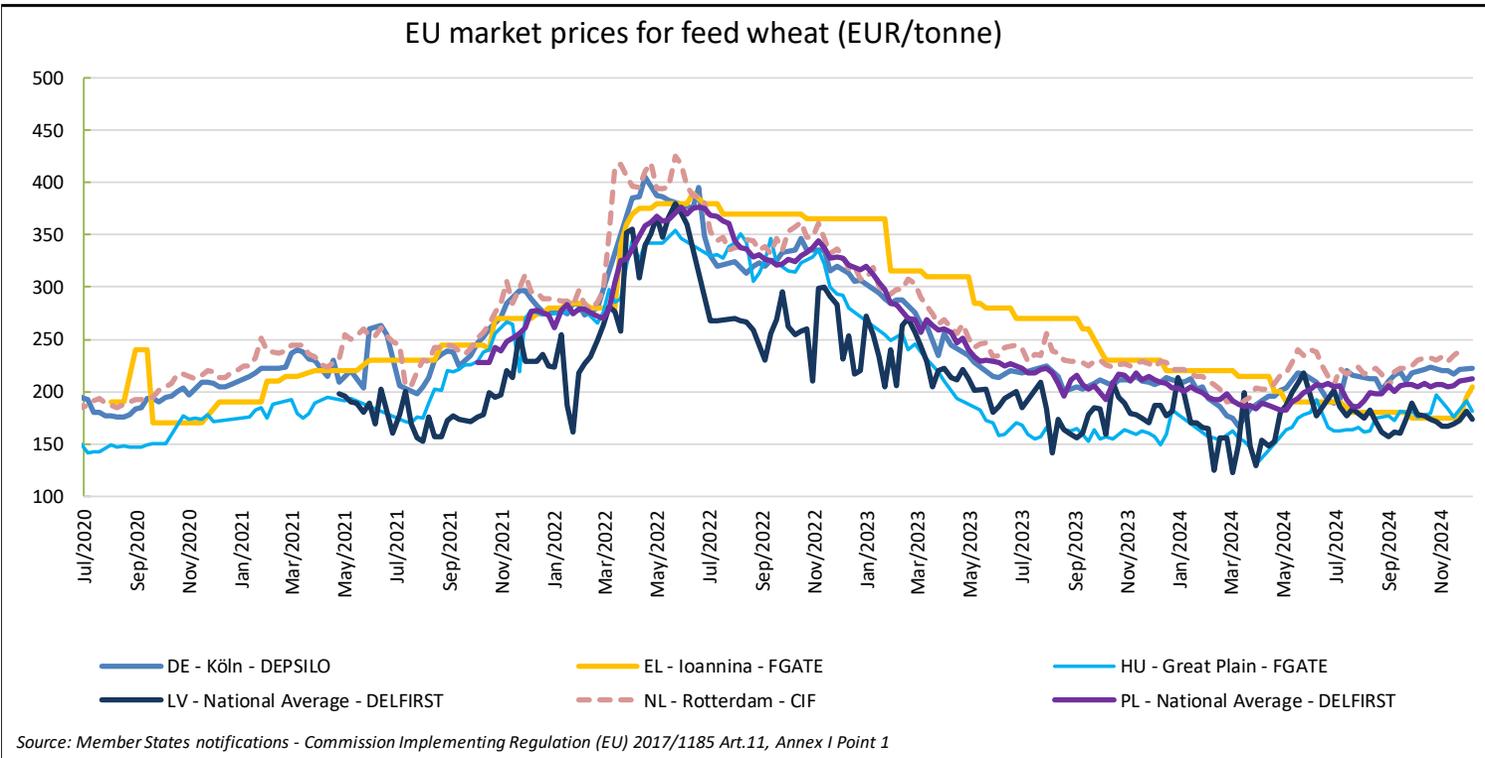


Source: Member States notifications - Commission Implementing Regulation (EU)

**France**  
(DELPORT Rouen)

• EUR 225 per tonne; 4.3% month-on-month; 0.3% year-on-year

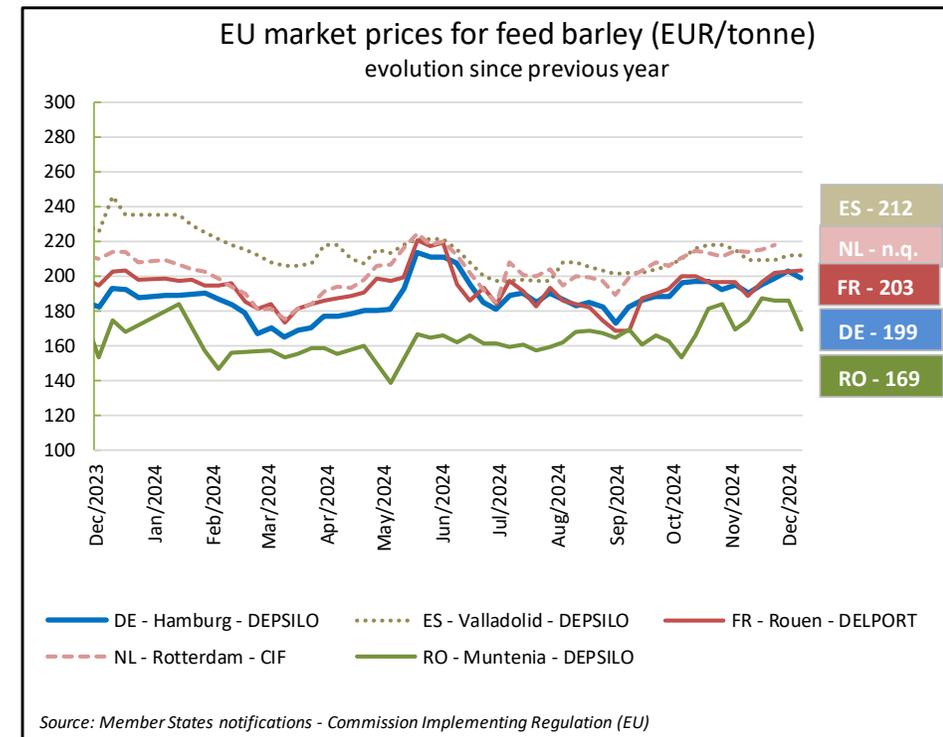
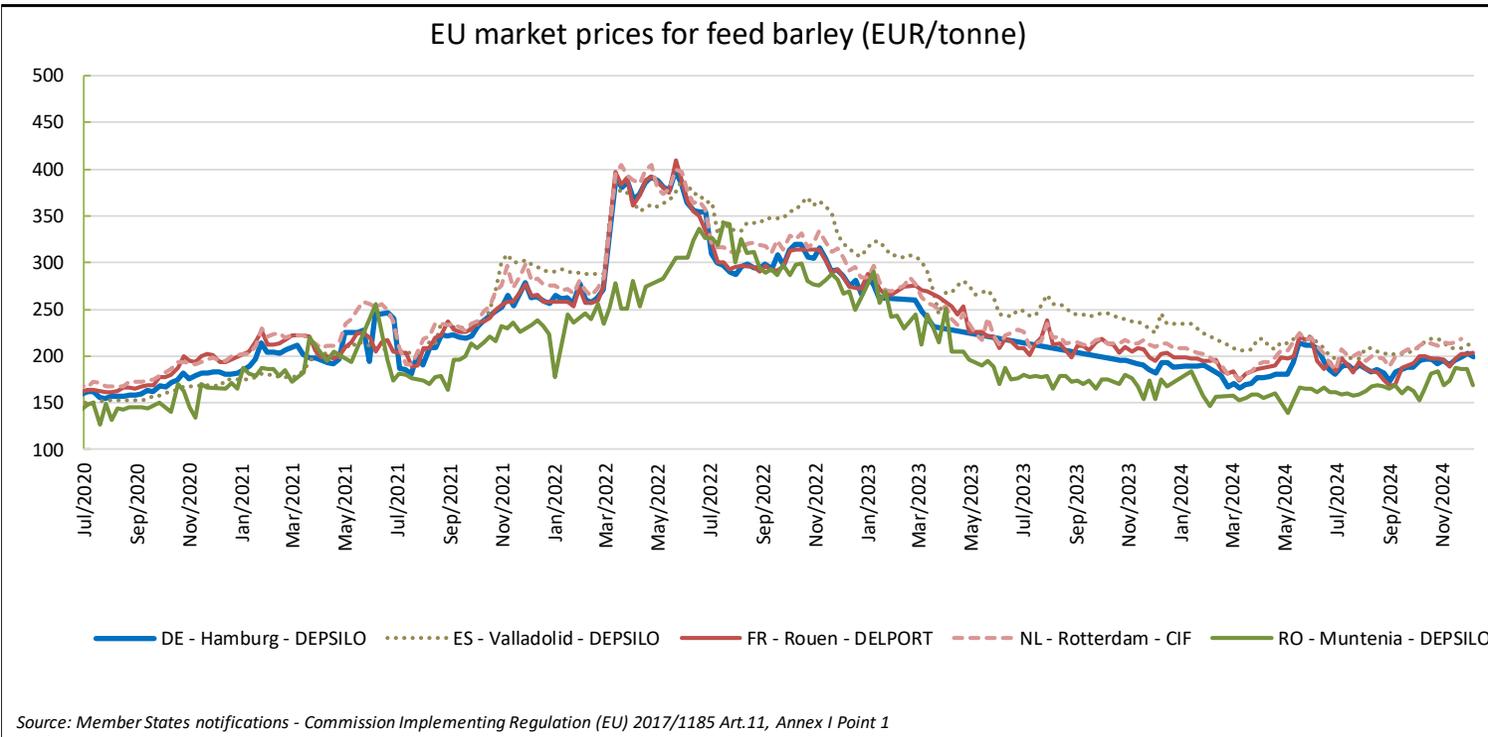
# EU market prices for feed wheat – (EUR per tonne)



**Poland**  
(DELFIRST –  
National average)

- EUR 210 per tonne; 1.7% month-on-month; -2.3% year-on-year

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

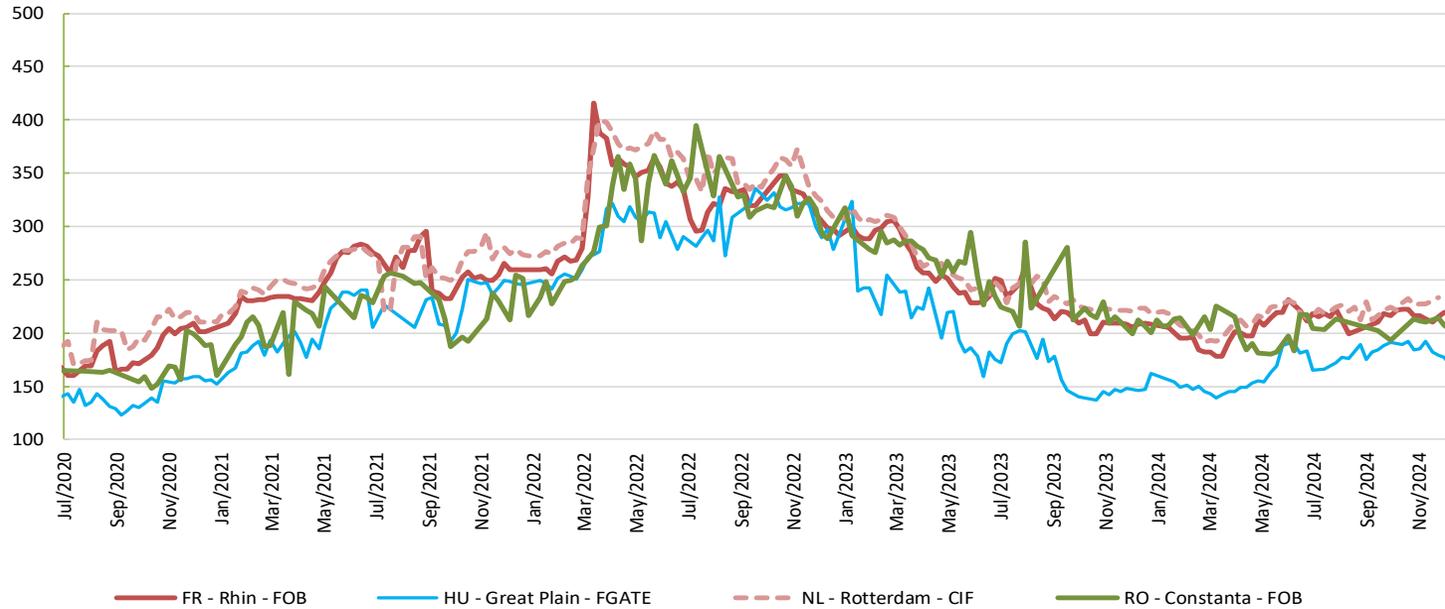


**France**  
(DELPORT Rouen)

• EUR 203 per tonne; 7.9% month-on-month; 0.2% year-on-year

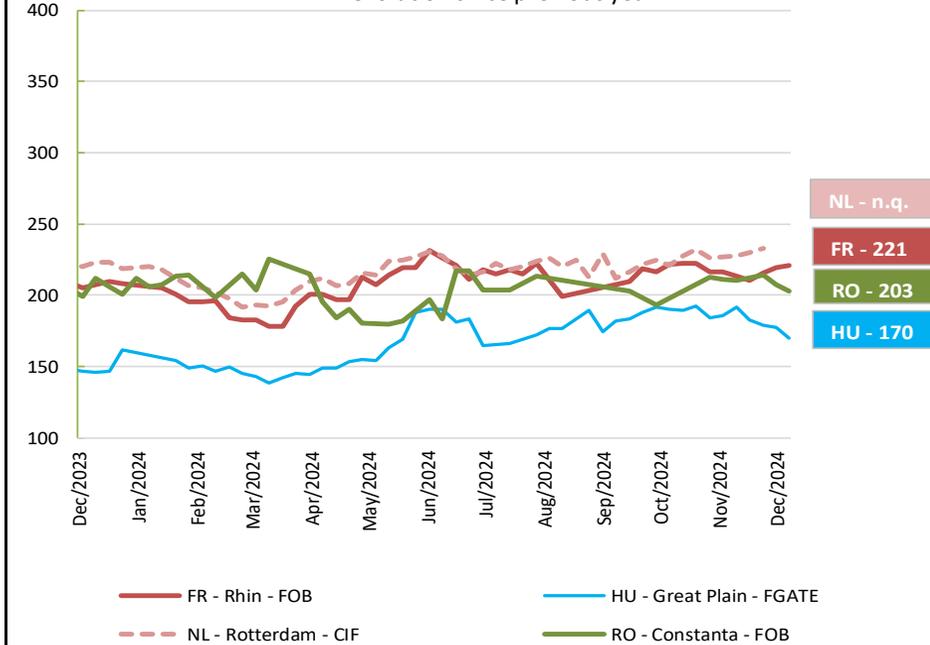
# EU market prices for maize – (EUR per tonne)

EU market prices for maize (EUR/tonne)



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

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



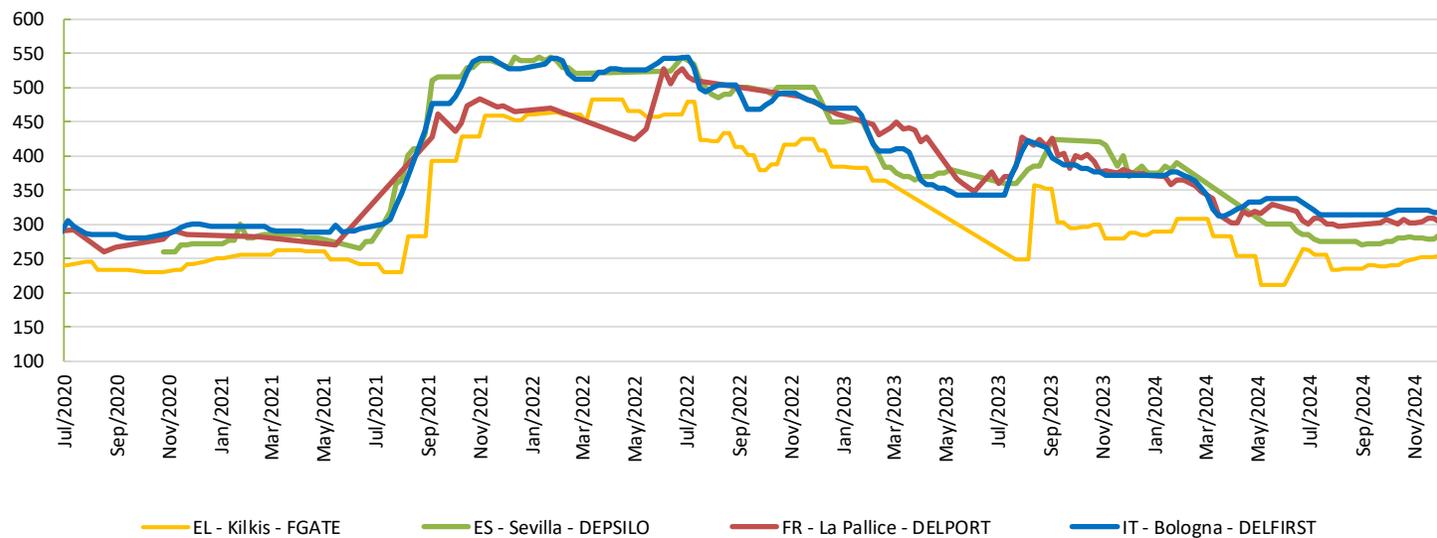
Source: Member States notifications - Commission Implementing Regulation (EU)

**France**  
(FOB Rhin)

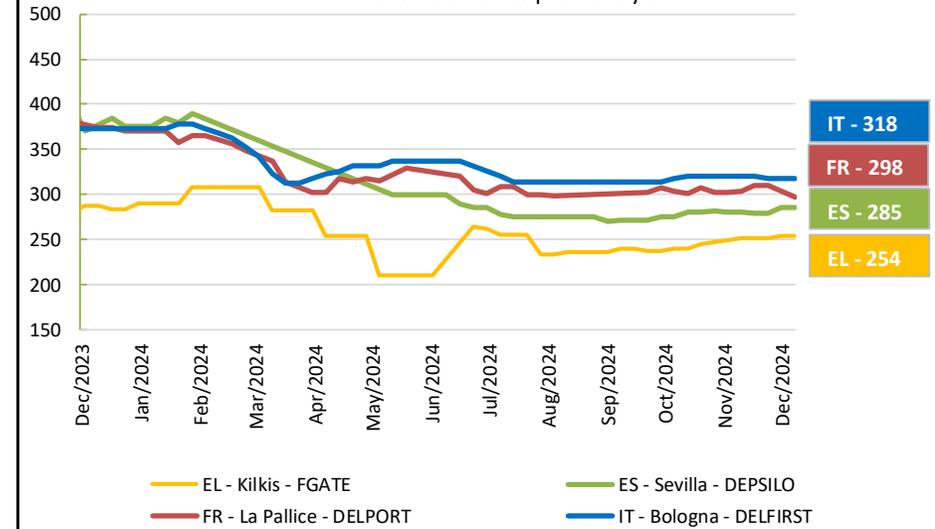
• EUR 221 per tonne; 3.3% month-on-month; 6.2% year-on-year

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

EU market prices for durum wheat (EUR/tonne)



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



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

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

**Italy**  
(DELFIRST Bologna)

• EUR 318 per tonne; -0.9% month-on-month; -14.8% year-on-year

# Last month evolution of EU cereal prices

- Compared to last month, cereal prices generally increased (from +1.7% for feed wheat to +7.9% for feed barley) and durum wheat prices held steady (-0.9%);
- Compared to last year, durum wheat prices remain much below their level one year ago (-14.8%); milling wheat, feed barley and feed wheat prices are close to their level one year ago (0.3%, 0.2% and -2.3% respectively); maize prices are above their level one year ago (6.2%).

# 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



© European Union 2020

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

