



# Cereals market situation

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

*26 March 2026*

# 2025/2026 marketing year

# EU27 2025/2026 Production

(million tonnes)

	2024/25 Estimate	2025/26			
		Feb Forecast	Mar Forecast	vs. 2024/25 (%)	vs. 5-year av. (%)
Soft wheat	111.0	134.4	134.2	21.0	9.1
Durum wheat	7.7	8.1	8.1	5.4	7.4
Barley	48.7	55.8	55.7	14.4	10.3
Maize	59.2	58.0	58.1	-1.9	-7.2
Rye	6.9	7.4	7.4	6.3	-1.7
Oats	7.7	8.9	8.9	15.7	18.7
<b>Total</b>	<b>253.9</b>	<b>287.4</b>	<b>287.3</b>	<b>13.1</b>	<b>5.7</b>

Source: DG AGRI - E4

Export data for France are not complete since the beginning of calendar year 2024. Export data for Bulgaria and Ireland are not complete since the beginning of marketing year 2023/24. Export data for Greece are not complete since mid-December 2025. The Commission services are in contact with member states concerned working to resolve the issues.

The anomalously **high durum wheat export** figures reported by Romania for 2025/26 may be linked to a reporting error that has been identified, with corrective steps reportedly underway.

# TAXUD Surveillance data

Cumul of weeks 1 to 38

Customs Surveillance (tonnes)	EU 01/07/2025 - 22/03/2026				EU 01/07/2024 - 23/03/2025		EU 01/07/2023 - 24/03/2024	
	Export	Y/Y variation	Import	Y/Y variation	Export	Import	Export	Import
	Common wheat	17 138 825	↑ +6%	2 768 307	↓ -56%	16 126 465	6 245 731	23 745 522
Common wheat flour (grain equivalent)	372 447	↑ +2%	152 482	↓ -29%	366 450	214 553	355 976	220 060
Durum wheat	666 549	↑ +98%	1 244 368	↓ -13%	336 108	1 433 247	463 197	2 057 844
Durum wheat meal (grain equivalent)	161 463	↓ -17%	3 932	↑ +19%	193 477	3 313	145 611	2 856
<b>Total Wheat</b>	<b>18 339 283</b>	<b>↑ +8%</b>	<b>4 169 090</b>	<b>↓ -47%</b>	<b>17 022 499</b>	<b>7 896 845</b>	<b>24 710 306</b>	<b>9 389 838</b>
Barley	6 877 497	↑ +78%	392 007	↓ -57%	3 863 772	919 119	4 587 270	1 528 899
Malt (grain equivalent)	2 112 716	↓ -9%	17 063	↑ +5%	2 323 467	16 263	2 199 584	29 034
Maize	1 259 549	↓ -19%	12 984 715	↓ -17%	1 554 796	15 663 608	3 094 963	13 767 039
Rye	89 977	↑ +13%	140	↓ -98%	79 368	7 366	146 876	189 414
Oats	128 025	↑ +123%	19 875	↓ -41%	57 408	33 962	79 647	95 670
Sorghum	8 126	↓ -18%	499 240	↑ +3385%	9 869	14 326	3 925	10 248
<b>Total Coarse grains</b>	<b>10 475 889</b>	<b>↑ +33%</b>	<b>13 913 041</b>	<b>↓ -16%</b>	<b>7 888 680</b>	<b>16 654 645</b>	<b>10 112 264</b>	<b>15 620 302</b>
<b>General Total</b>	<b>28 815 172</b>	<b>↑ +16%</b>	<b>18 082 131</b>	<b>↓ -26%</b>	<b>24 911 179</b>	<b>24 551 490</b>	<b>34 822 570</b>	<b>25 010 139</b>

# EU 2025/2026 Cereals Balance Sheet

(thousand metric tonnes)

	2025/26 fc.									
<i>last updated: 26/03/2026</i>	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
<b>Beginning stocks</b>	8 107	1 794	716	18 433	45	281	1 892	63	170	31 501
Usable production	134 220	55 674	8 067	58 117	7 361	837	8 872	11 400	2 744	287 292
<i>Area (thousand ha)</i>	21 520	9 984	2 201	8 493	1 624	209	2 628	2 456	983	50 098
<i>Yield (tonnes/ha)</i>	6	6	4	7	5	4	3	5	3	6
Imports (from third countries)	3 900	700	1 700	18 800	129	500	110	1	146	25 986
<b>Total supply</b>	<b>146 227</b>	<b>58 168</b>	<b>10 483</b>	<b>95 349</b>	<b>7 535</b>	<b>1 618</b>	<b>10 874</b>	<b>11 465</b>	<b>3 060</b>	<b>344 778</b>
Total domestic use	103 506	43 294	8 965	76 870	6 855	1 323	6 537	10 354	2 281	259 986
Human consumption	41 973	366	8 217	4 783	3 094	157	1 121	52	23	59 786
Seed	4 600	2 131	400	402	300	29	350	500	270	8 981
Industrial uses	9 200	6 800	95	12 000	1 500	0	101	445	170	30 310
<i>of which bioethanol/biofuel</i>	<i>(3 400)</i>	<i>(537)</i>	<i>(0)</i>	<i>(6 900)</i>	<i>(900)</i>	<i>(0)</i>	<i>(0)</i>	<i>(344)</i>	<i>(14)</i>	<i>(12 095)</i>
Animal feed	46 928	33 663	205	59 336	1 917	1 133	4 912	9 288	1 802	159 185
Losses	805	334	48	349	44	5	53	68	16	1 724
Exports (to third countries)	28 000	11 000	919	1 500	168	15	200	4	17	41 822
<b>Total use</b>	<b>131 506</b>	<b>54 294</b>	<b>9 884</b>	<b>78 370</b>	<b>7 023</b>	<b>1 338</b>	<b>6 737</b>	<b>10 357</b>	<b>2 298</b>	<b>301 808</b>
<b>Ending stocks**</b>	<b>14 720</b>	<b>3 874</b>	<b>599</b>	<b>16 979</b>	<b>512</b>	<b>280</b>	<b>4 136</b>	<b>1 107</b>	<b>761</b>	<b>42 970</b>
<b>Change in stocks**</b>	<b>6 614</b>	<b>2 080</b>	<b>-117</b>	<b>-1 453</b>	<b>466</b>	<b>-1</b>	<b>2 244</b>	<b>1 044</b>	<b>592</b>	<b>11 469</b>

\* Marketing year: from July to June

\*\* At the end of the marketing year

# EU Cereals Balance Sheet 2025/2026 (Summary)

- Total **EU cereals production** was slightly revised down to **287.3 million tonnes**. It is 5.7% above the five-year trimmed average and +13.1% year-on-year.
- **Trade** forecasts were revised as follows : **soft wheat exports** down by 0.5 million tonnes; **barley imports** down by 0.1 million tonnes and durum wheat imports down by 0.2 million tonnes.

# 2026/2027 marketing year

# EU27 2026/2027 Area

(million ha)

	2025/26	2026/27		
	Forecast	Mar Projection	vs. 2025/26 (%)	vs. 5-year av. (%)
Soft wheat	21.5	21.4	-0.5	-1.5
Durum wheat	2.2	2.2	-2.0	-4.0
Barley	10.0	11.1	11.0	7.8
Maize	8.5	8.4	-1.3	-3.3
Rye	1.6	1.6	0.3	-8.0
Oats	2.6	2.5	-5.9	0.1
<b>Total</b>	<b>50.1</b>	<b>50.6</b>	<b>1.1</b>	<b>0.1</b>

Source: DG AGRI - E4

# EU27 2026/2027 Production

(million tonnes)

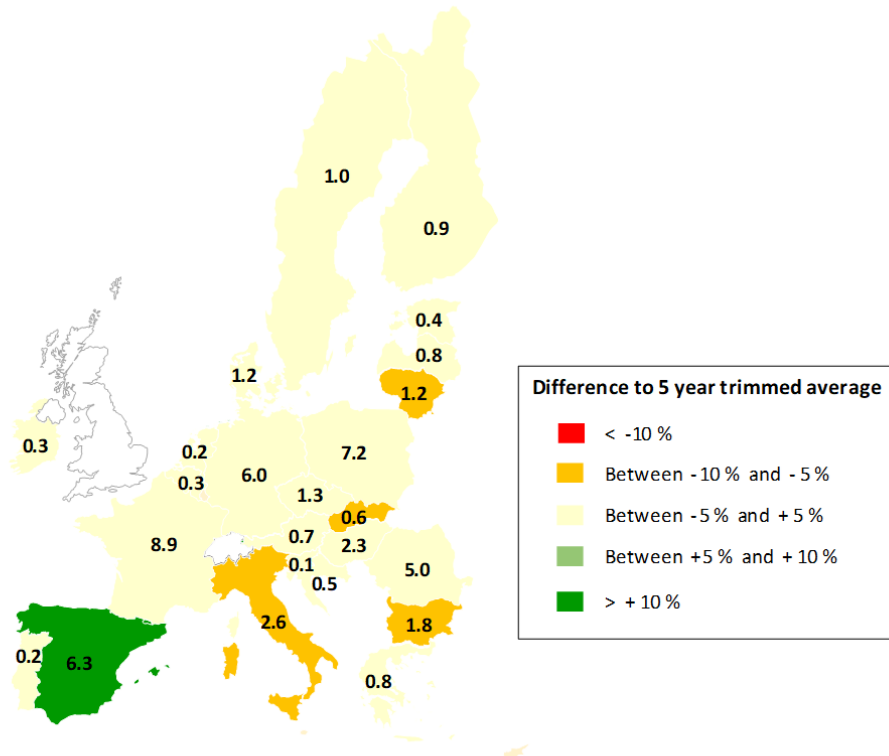
	2025/26	2026/27		
	Forecast	Mar Projection	vs. 2025/26 (%)	vs. 5-year av. (%)
Soft wheat	134.2	125.9	-6.2	-0.6
Durum wheat	8.1	7.8	-3.5	0.7
Barley	55.7	54.7	-1.7	8.4
Maize	58.1	61.2	5.3	2.8
Rye	7.4	6.9	-6.2	-6.0
Oats	8.9	7.6	-13.9	2.2
<b>Total</b>	<b>287.3</b>	<b>278.1</b>	<b>-3.2</b>	<b>1.5</b>

Source: DG AGRI - E4

# Total cereals 2026/27 - area

March 2026 Projection

Total cereals area - 2026 projection (million hectares)

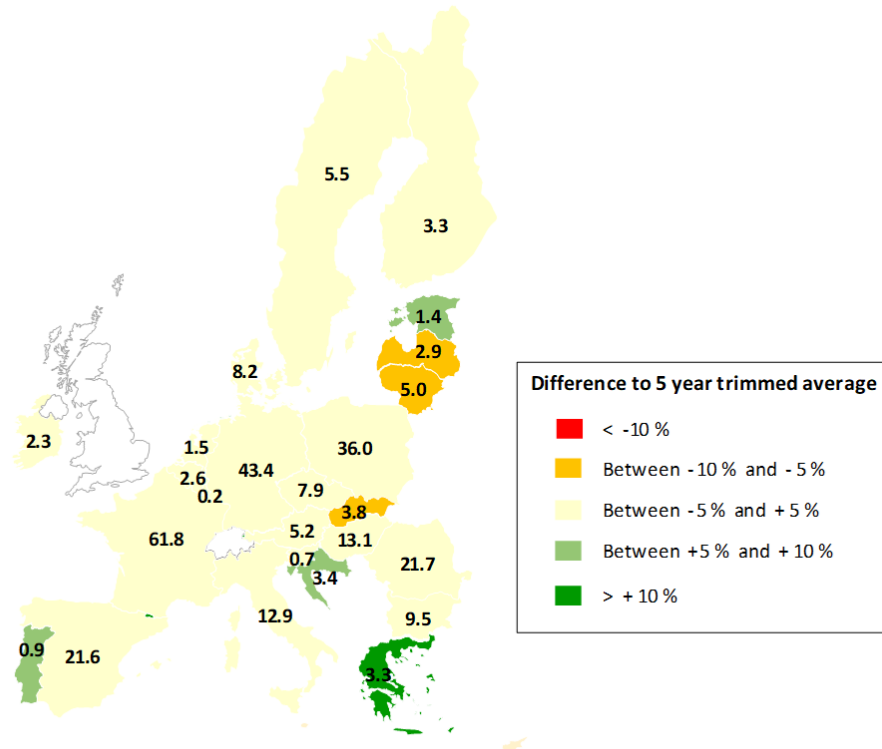


EU area: 50.6 million hectares - difference to 5 year trimmed average: +0.1%

# Total cereals 2026/27 - production

March 2026 Projection

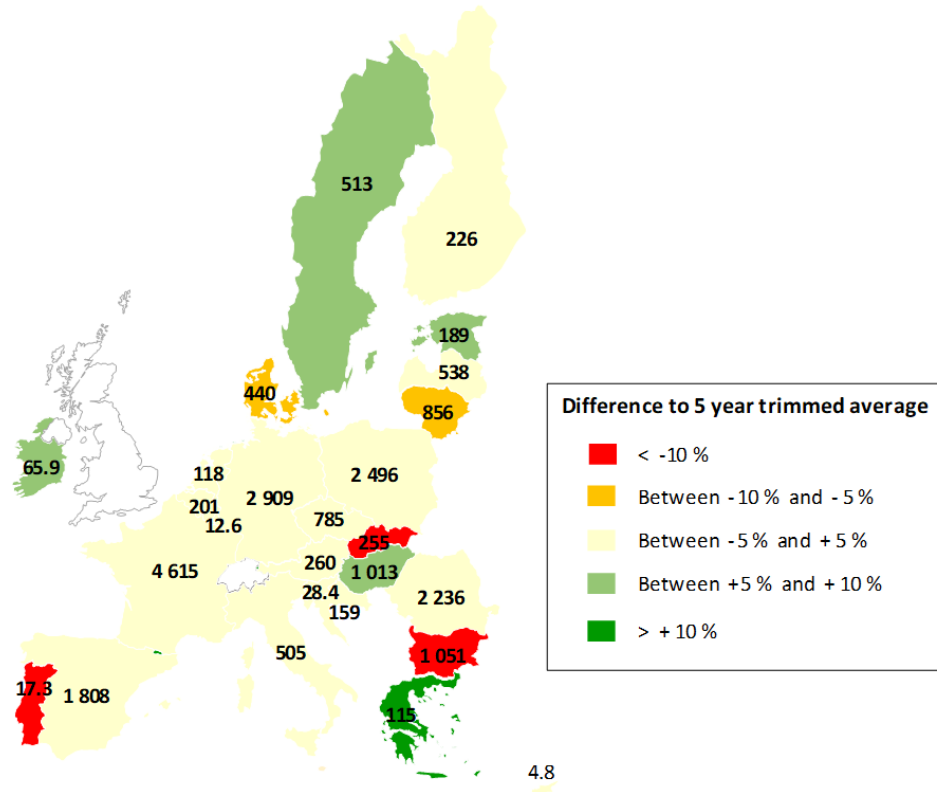
Total cereals production - 2026 projection (million tonnes)



EU production: 278.1 million tonnes - difference to 5 year trimmed average: +1.5%

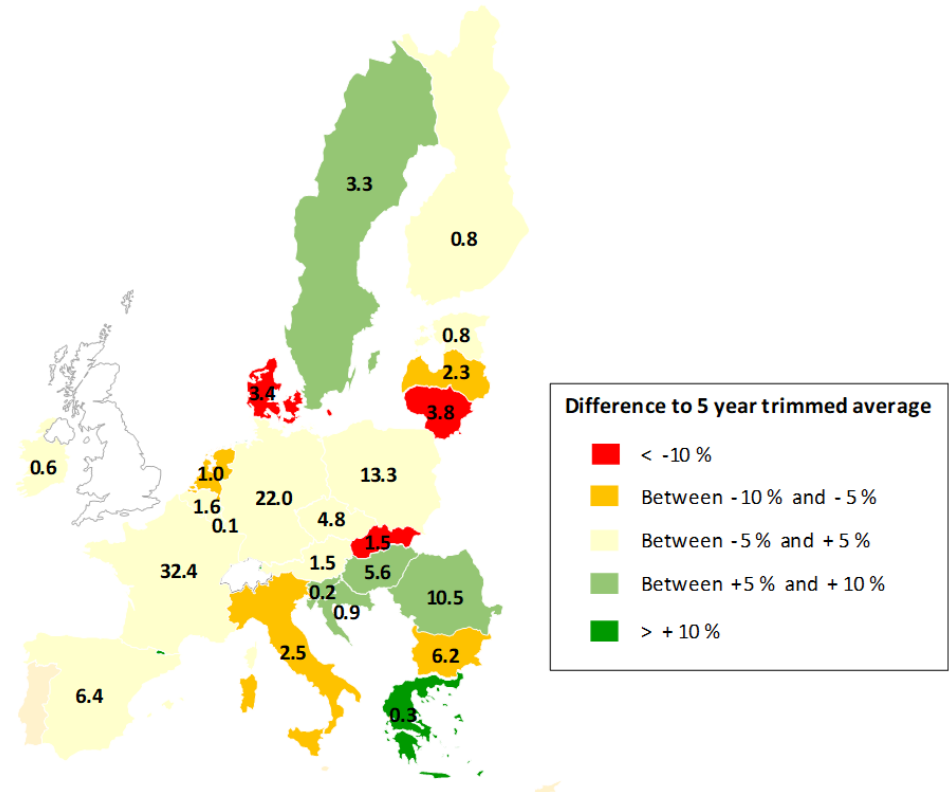
# Soft wheat 2026/27

Soft wheat area - 2026 projection (thousand hectares)



EU area: 21 416 thousand hectares - difference to 5 year trimmed average: -1.5%

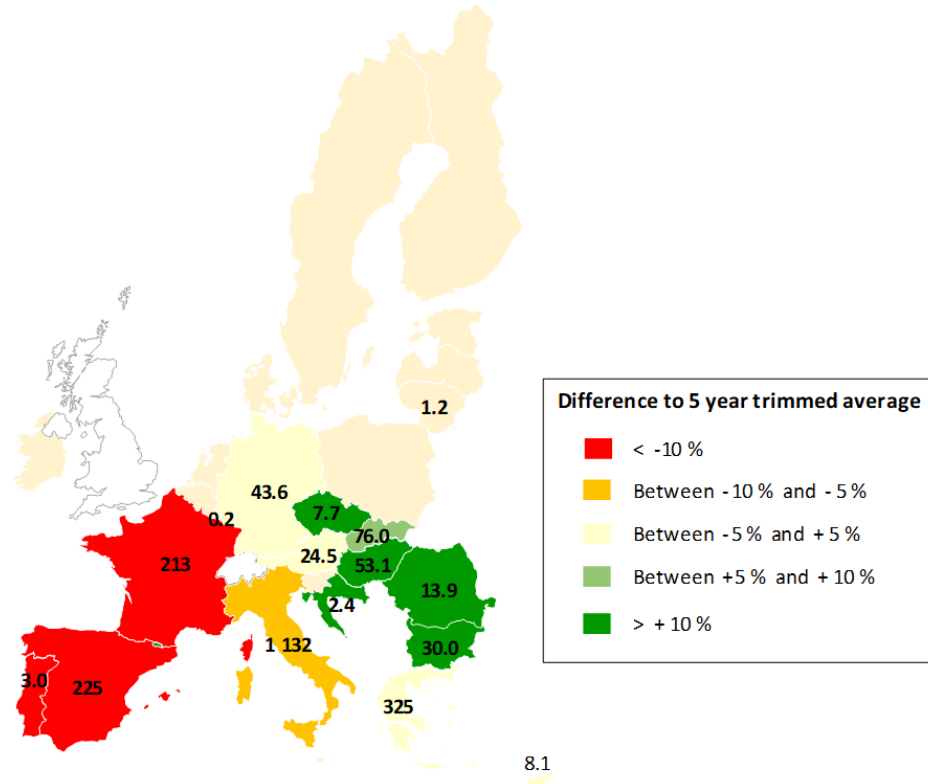
Soft wheat production - 2026 projection (million tonnes)



EU production: 125.9 million tonnes - difference to 5 year trimmed average: -0.6%

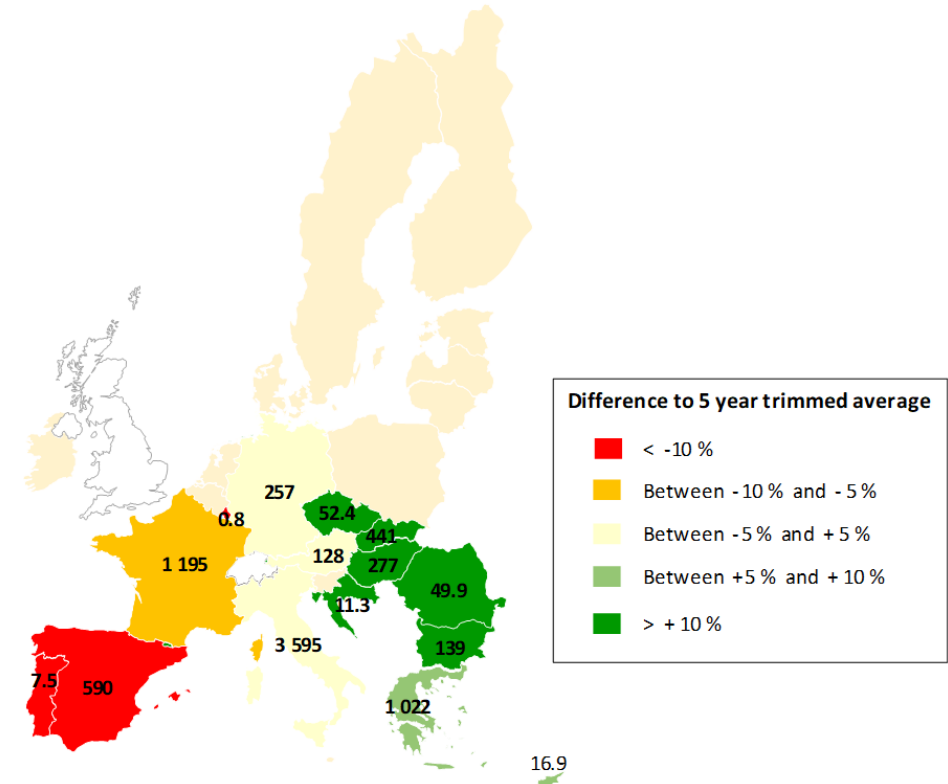
# Durum wheat 2026/27

Durum wheat area - 2026 projection (thousand hectares)



EU area: 2 158 thousand hectares - difference to 5 year trimmed average: -4%

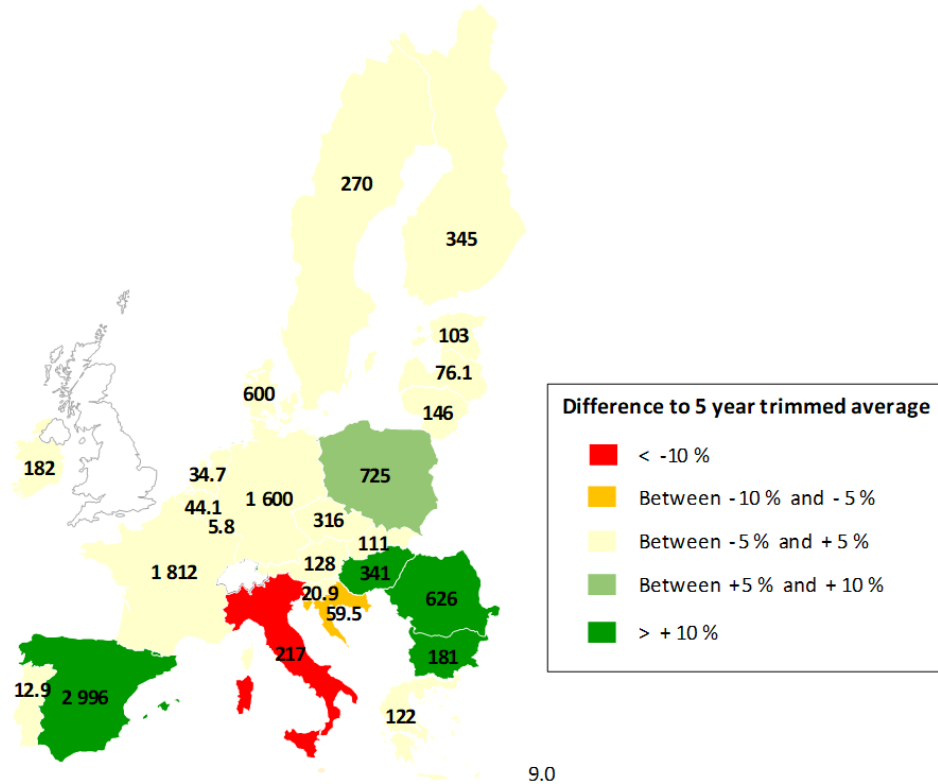
Durum wheat production - 2026 projection (thousand tonnes)



EU production: 7 783 thousand tonnes - difference to 5 year trimmed average: +0.7%

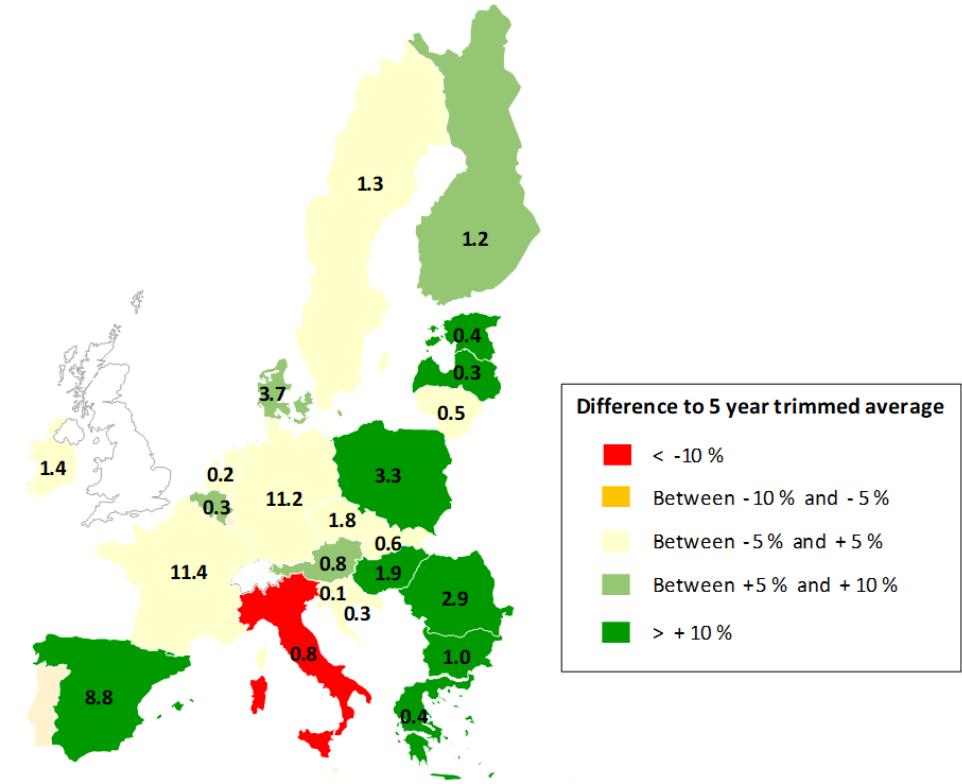
# Barley 2026/27

Barley area - 2026 projection (thousand hectares)



EU area: 11 085 thousand hectares - difference to 5 year trimmed average: +7.8%

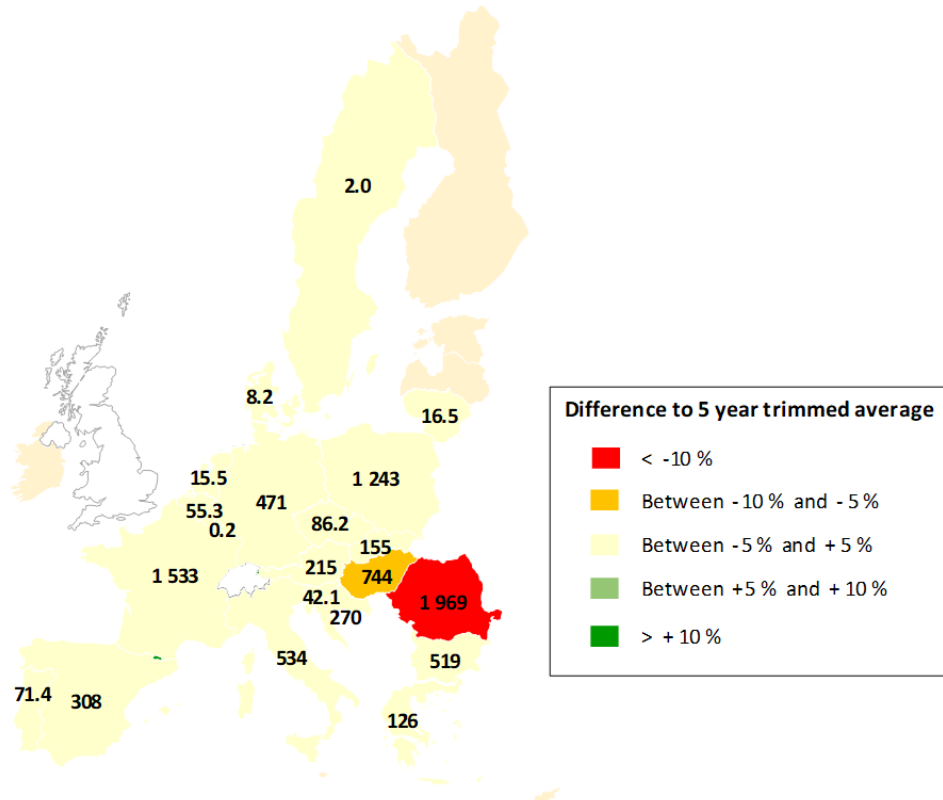
Barley production - 2026 projection (million tonnes)



EU production: 54.7 million tonnes - difference to 5 year trimmed average: +8.4%

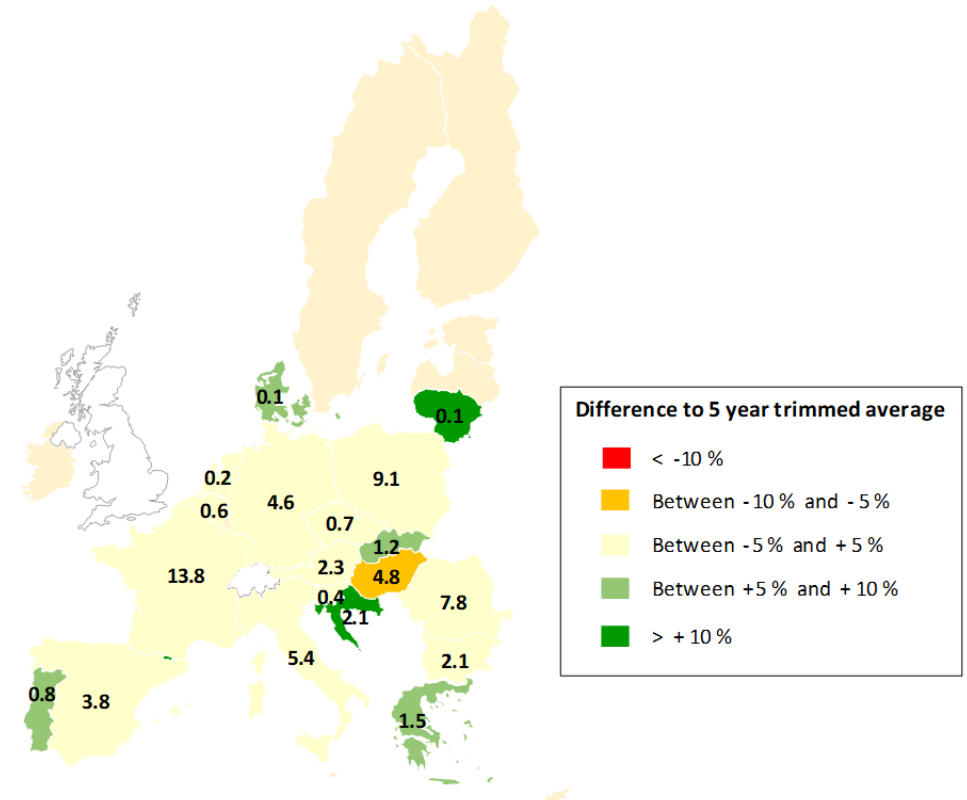
# Maize 2026/27

Maize area - 2026 projection (thousand hectares)



EU area: 8 385 thousand hectares - difference to 5 year trimmed average: -3.3%

Maize production - 2026 projection (million tonnes)



EU production: 61.2 million tonnes - difference to 5 year trimmed average: +2.8%

# EU 2026/2027 Usable Production: comparison with other forecasters

*(million tonnes)*

	EC DG AGRI 26-March	Stratégie Grains 19-March	COCERAL 17-March	IGC 19-March
Soft Wheat	125.9	128.5	128.8	137.5
Durum Wheat	7.8	7.5	8.0	
Barley	54.7	52.2	53.0	52.5
Maize	61.2	57.8	60.6	59.0
Rye	6.9	7.0	7.5	6.7
<b>Total Cereals</b>	<b>278.1</b>	<b>273.9</b>	<b>277.4</b>	<b>278.4</b>

# 2026/2027 – Usable Production evolution

	Projection (Mt)	year/year variation	vs. 5-year average
<i>France</i>	61.8	-1.1%	-0.9%
<i>Germany</i>	43.4	-3.3%	2.4%
<i>Poland</i>	36.0	-3.7%	2.4%
<i>Romania</i>	21.7	-5.4%	4.4%
<i>Spain</i>	21.6	-10.6%	4.5%
<i>Hungary</i>	13.1	11.3%	2.6%
<i>Italy</i>	12.9	-1.1%	-1.8%

*\*: 75% of the EU production*

*Source: DG AGRI - E4*

# 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	21 416	201	1 051	785	440	2 909	189	66	115	1 808	4 615	159	505	5	538	856	13	1 013	118	260	2 496	17	2 236	28	255	226	513
	Yield	5.92	8.07	5.91	6.20	7.89	7.63	4.09	9.53	3.05	3.54	7.09	5.92	5.02	1.78	4.24	4.52	5.92	5.55	8.59	5.94	5.37	2.29	4.73	5.69	5.77	3.45	6.40
	Production	126 842	1 624	6 211	4 868	3 471	22 199	771	628	352	6 406	32 705	940	2 532	8	2 278	3 871	74	5 621	1 014	1 542	13 406	40	10 588	162	1 472	779	3 280
Durum wheat	Area	2 158	0	30	8	0	44	0	0	325	225	213	2	1 132	8	0	1	0	53	0	24	0	3	14	0	76	0	0
	Yield	3.64		4.67	6.91		5.96			3.18	2.65	5.67	4.76	3.21	2.09		0.00	3.90	5.28		5.30		2.55	3.62	0.00	5.86		
	Production	7 865	0	140	53	0	260	0	0	1 032	596	1 208	11	3 634	17	0	0	1	280	0	130	0	8	50	0	445	0	0
Barley	Area	11 085	44	181	316	600	1 600	103	182	122	2 996	1 812	59	217	9	76	146	6	341	35	128	725	13	626	21	111	345	270
	Yield	4.98	7.71	5.55	5.65	6.19	7.08	3.73	7.90	3.09	2.96	6.34	4.91	3.94	2.12	3.47	3.77	5.93	5.64	7.15	6.23	4.65	2.67	4.60	5.28	5.13	3.60	4.86
	Production	55 213	340	1 004	1 788	3 709	11 323	385	1 439	378	8 864	11 483	292	854	19	264	552	34	1 924	248	797	3 366	34	2 879	110	571	1 243	1 311
Grain maize	Area	8 385	55	519	86	8	471	0	0	126	308	1 533	270	534	0	0	17	0	744	16	215	1 243	71	1 969	42	155	0	2
	Yield	7.33	10.64	4.12	8.49	7.40	9.77			11.76	12.30	9.04	7.82	10.15			7.18	7.76	6.43	12.21	10.51	7.38	10.60	3.96	8.79	7.72		7.43
	Production	61 444	588	2 140	732	60	4 602	0	0	1 479	3 786	13 860	2 112	5 424	0	0	119	2	4 783	189	2 262	9 172	757	7 798	370	1 195	0	15
Rye	Area	1 629	1	7	24	93	528	18	0	10	100	30	1	4	0	23	19	1	23	2	28	628	13	11	1	14	22	28
	Yield	4.33	3.50	2.10	5.32	6.53	5.34	4.06		1.93	2.35	4.10	3.31	3.00		4.29	2.50	5.48	3.25	3.51	4.84	3.66	1.01	2.97	4.12	3.85	3.88	5.95
	Production	7 058	3	15	127	607	2 820	72	0	19	235	121	4	11	0	97	48	7	75	7	134	2 300	14	32	5	54	86	165
Oats	Area	2 474	3	16	52	62	165	42	29	63	495	94	16	100	0	95	97	2	24	1	20	515	29	77	1	11	313	153
	Yield	3.12	3.97	2.28	3.68	5.26	4.37	2.48	7.43	1.14	2.08	4.14	3.17	2.28	1.54	2.57	2.14	4.59	2.89	5.12	3.89	3.44	1.03	2.25	3.21	2.59	3.58	4.02
	Production	7 726	14	37	191	325	719	104	214	72	1 031	390	50	227	0	244	208	7	70	7	76	1 771	30	174	3	30	1 120	614
Sorghum	Area	166	0	4	0	0	0	0	0	2	6	62	0	41	0	0	0	0	32	0	5	0	0	9	0	5	0	0
	Yield	4.46		2.01						3.18	3.75	4.54		5.39					3.91		7.38			1.97	3.52	4.55		
	Production	741	0	8	0	0	0	0	0	7	22	281	0	219	0	0	0	0	126	0	37	0	0	18	0	22	0	0
Triticale	Area	2 415	5	15	43	9	295	7	0	10	279	313	10	17	1	8	61	5	72	1	47	1 082	13	70	6	8	10	30
	Yield	4.52	6.02	3.31	4.96	6.82	6.10	4.24		2.58	2.55	4.92	4.16	4.53	1.71	3.71	3.29	6.32	4.29	4.75	5.76	4.56	1.36	4.00	5.00	3.50	4.68	5.31
	Production	10 916	29	50	214	61	1 796	29	0	27	711	1 540	42	77	1	29	200	30	307	6	273	4 932	17	280	31	28	46	159
Other cereals	Area	922	1	4	5	10	26	7	0	1	49	194	1	26	0	24	51	0	7	1	13	467	1	1	5	2	18	10
	Yield	2.91	3.58	1.76	1.77	2.96	4.14	1.22	0.00	3.12	2.32	3.62	1.06	2.83		1.24	0.93	4.14	1.34	0.00	2.82	3.04	0.98	1.90	0.69	0.91	2.54	3.02
	Production	2 681	4	7	9	28	106	9	0	2	114	701	1	72	0	29	47	1	10	0	35	1 419	1	3	3	2	46	30
Total cereals	Area	50 649	311	1 827	1 319	1 221	6 036	365	277	774	6 266	8 865	519	2 574	23	762	1 248	27	2 310	174	739	7 155	161	5 015	104	638	934	1 005
	Yield	5.54	8.37	5.26	6.05	6.77	7.26	3.75	8.24	4.35	3.47	7.03	6.66	5.07	2.02	3.86	4.04	5.87	5.71	8.48	7.15	5.08	5.59	4.35	6.55	5.99	3.55	5.55
	Production	280 488	2 602	9 611	7 981	8 262	43 825	1 370	2 280	3 368	21 765	62 288	3 453	13 050	46	2 941	5 045	157	13 197	1 472	5 285	36 366	901	21 823	684	3 819	3 320	5 575

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# EU 2026/2027 Cereals Balance Sheet

(thousand metric tonnes)

	2026/27 proj.									
<i>last updated: 26/03/2026</i>	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
<b>Beginning stocks</b>	14 720	3 874	599	16 979	512	280	4 136	1 107	761	42 970
Usable production	125 853	54 744	7 783	61 186	6 903	704	7 641	10 698	2 555	278 067
<i>Area (thousand ha)</i>	21 416	11 085	2 158	8 385	1 629	166	2 474	2 415	922	50 649
<i>Yield (tonnes/ha)</i>	6	5	4	7	4	4	3	4	3	5
Imports (from third countries)	3 900	700	1 935	19 299	143	104	125	2	140	26 348
<b>Total supply</b>	<b>144 474</b>	<b>59 318</b>	<b>10 317</b>	<b>97 465</b>	<b>7 558</b>	<b>1 088</b>	<b>11 902</b>	<b>11 807</b>	<b>3 456</b>	<b>347 384</b>
Total domestic use	103 535	43 289	8 979	77 197	6 858	1 023	6 532	10 350	2 280	260 043
Human consumption	42 052	367	8 232	4 792	3 100	157	1 123	52	23	59 898
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	0	101	445	170	30 310
<i>of which bioethanol/biofuel</i>	<i>(3 400)</i>	<i>(537)</i>	<i>(0)</i>	<i>(6 900)</i>	<i>(900)</i>	<i>(0)</i>	<i>(0)</i>	<i>(344)</i>	<i>(14)</i>	<i>(12 095)</i>
Animal feed	46 928	33 663	205	59 636	1 917	833	4 912	9 288	1 802	159 185
Losses	755	328	47	367	41	4	46	64	15	1 668
Exports (to third countries)	29 981	10 110	944	3 993	166	15	137	3	16	45 365
<b>Total use</b>	<b>133 517</b>	<b>53 399</b>	<b>9 923</b>	<b>81 190</b>	<b>7 024</b>	<b>1 037</b>	<b>6 669</b>	<b>10 353</b>	<b>2 296</b>	<b>305 409</b>
<b>Ending stocks**</b>	<b>10 957</b>	<b>5 919</b>	<b>393</b>	<b>16 275</b>	<b>533</b>	<b>51</b>	<b>5 233</b>	<b>1 454</b>	<b>1 160</b>	<b>41 975</b>
<b>Change in stocks**</b>	<b>-3 764</b>	<b>2 045</b>	<b>-205</b>	<b>-704</b>	<b>22</b>	<b>-229</b>	<b>1 097</b>	<b>346</b>	<b>399</b>	<b>-994</b>

\* Marketing year: from July to June

\*\* At the end of the marketing year

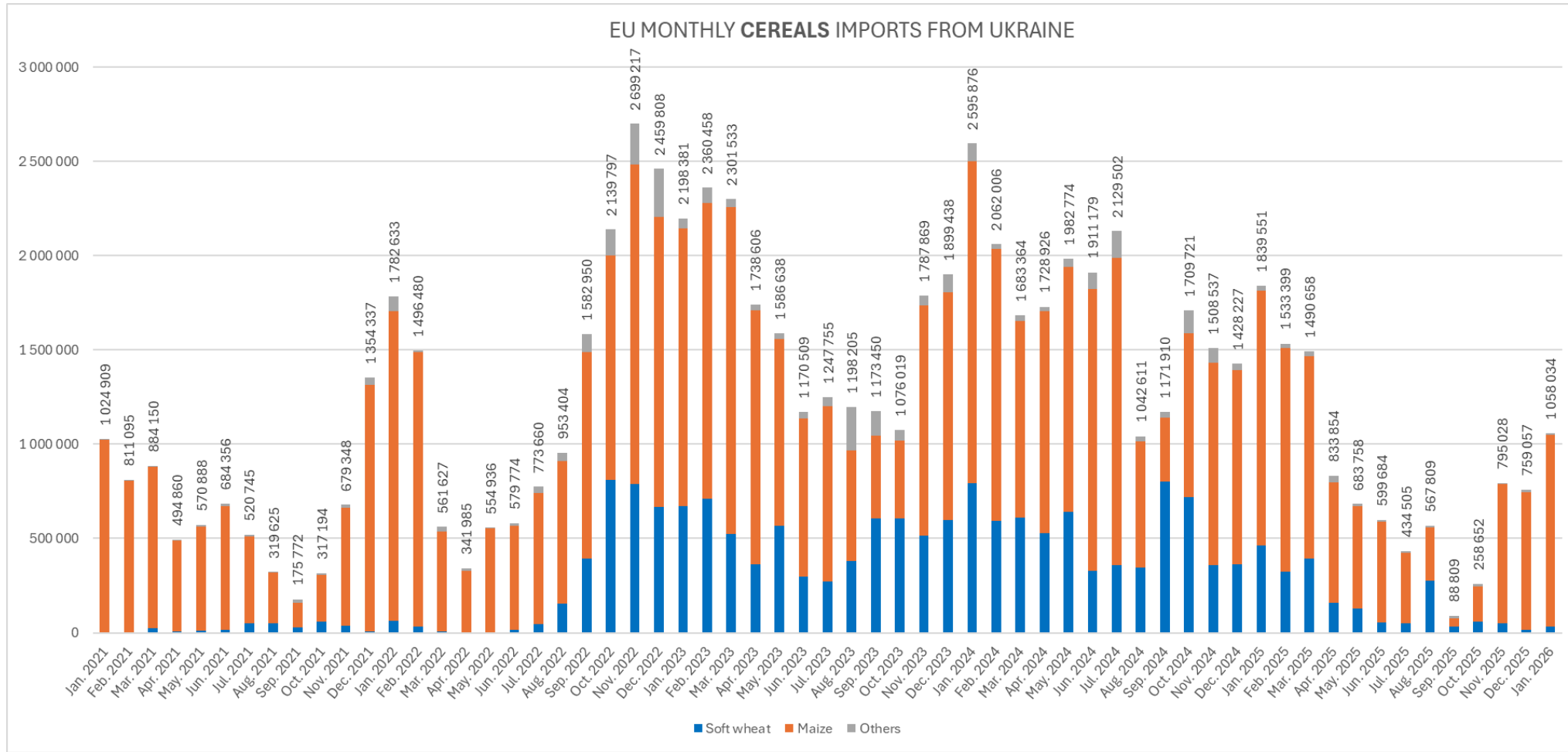
# EU Cereals Balance Sheet 2026/2027 (Summary)

- Total **EU cereals production** is projected at **278.1 million tonnes**. It is 1.5% above the five-year trimmed average and -3.2% year-on-year.
- In this first projection, **areas** are based on figures communicated by the MS to Eurostat, directly to DG AGRI, collected from MS official websites or on five-year trimmed averages or on trends (mainly for summer crops). Romanian and Hungarian maize areas are based on 2025 figures.
- **Yields** are based on forecasts from JRC MARS Bulletin.
- **Trade** forecasts are generally based on five-year trimmed averages, but soft wheat and barley imports are based on current marketing year forecast.
- **Consumption** figures were practically unchanged compared to 2025/26 season (except for food consumption revised on population growth). For animal use, 0.3 million tonnes were shifted from sorghum to maize.

# Focus on EU imports from Ukraine

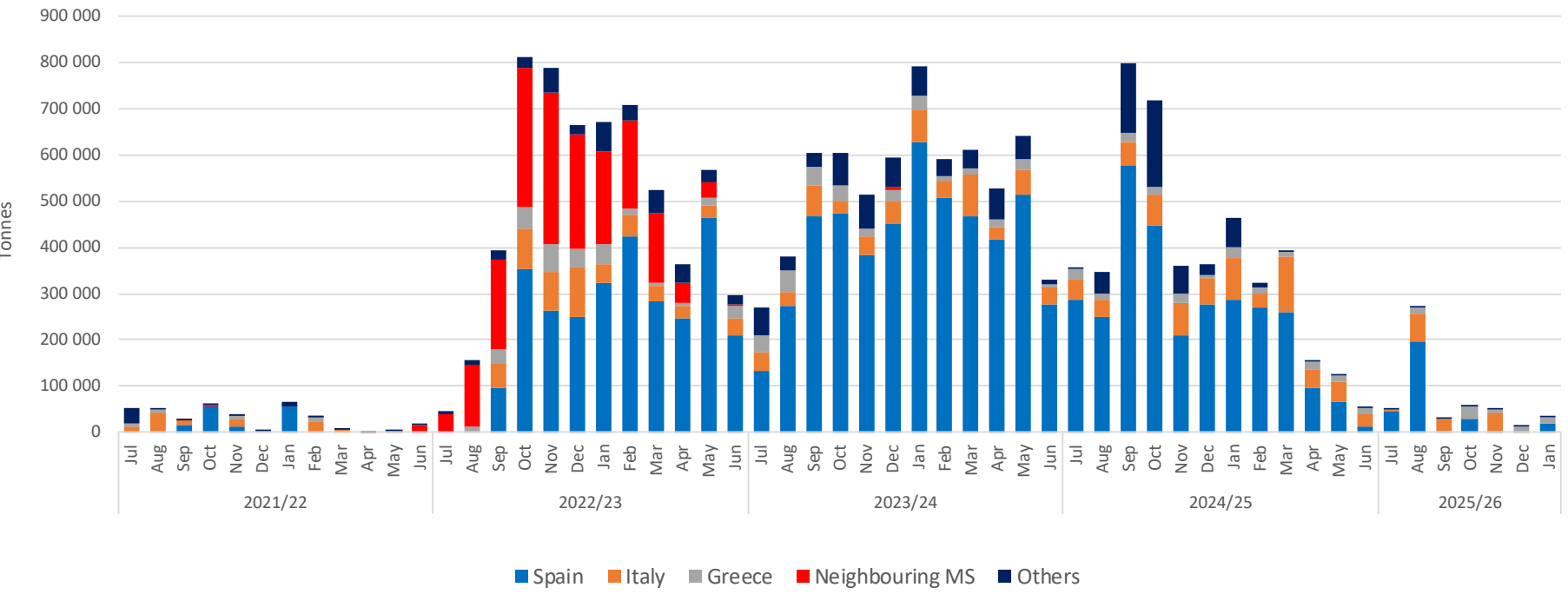
# EU monthly cereals imports from Ukraine since January 2021 ( in tonnes)

– source COMEXT

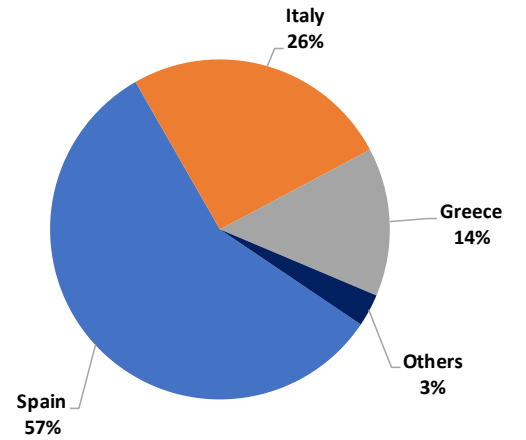


# EU imports from Ukraine - wheat

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



**WHEAT IMPORTS FROM UKRAINE**  
SHARE OF THE MAIN IMPORTING MEMBER STATES

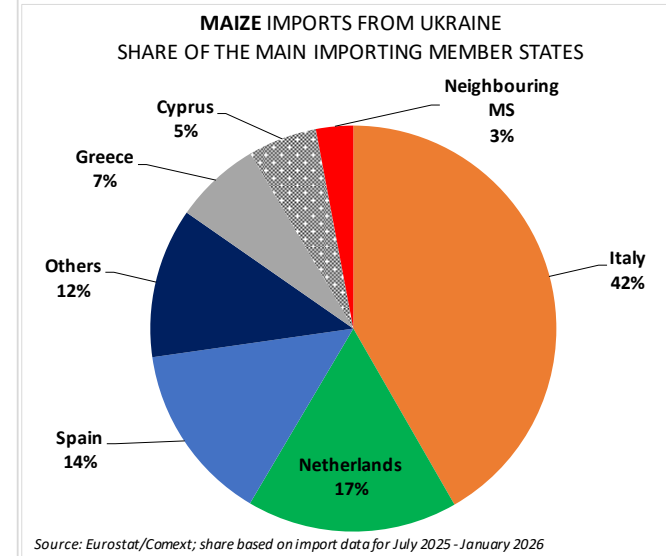
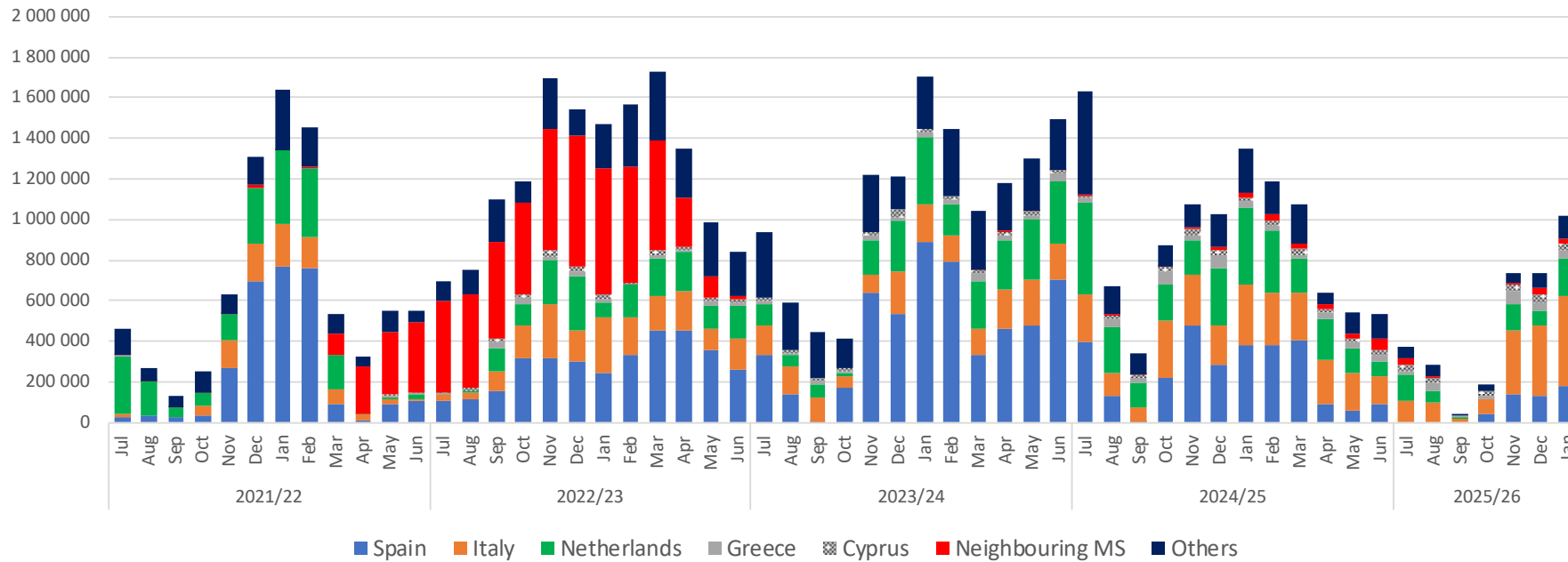


Source: Eurostat/Comext; share based on import data for July 2025 - January 2026

Source: Eurostat/Comext

# EU imports from Ukraine - maize

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

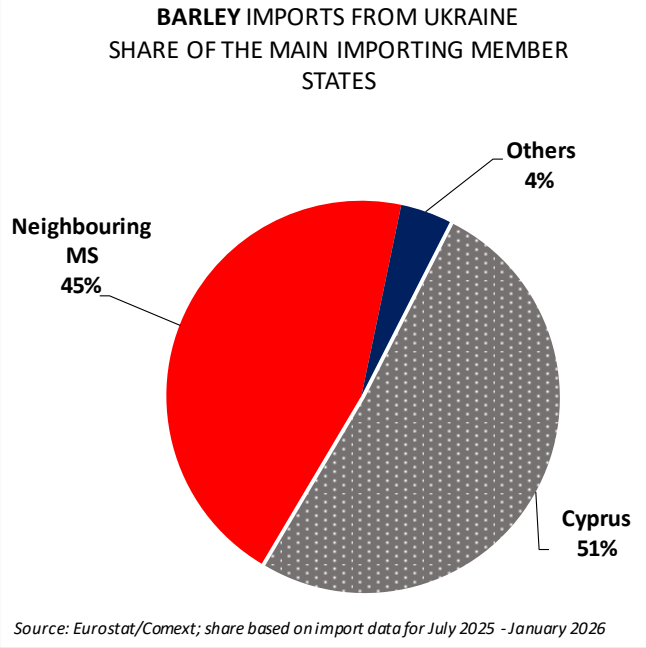
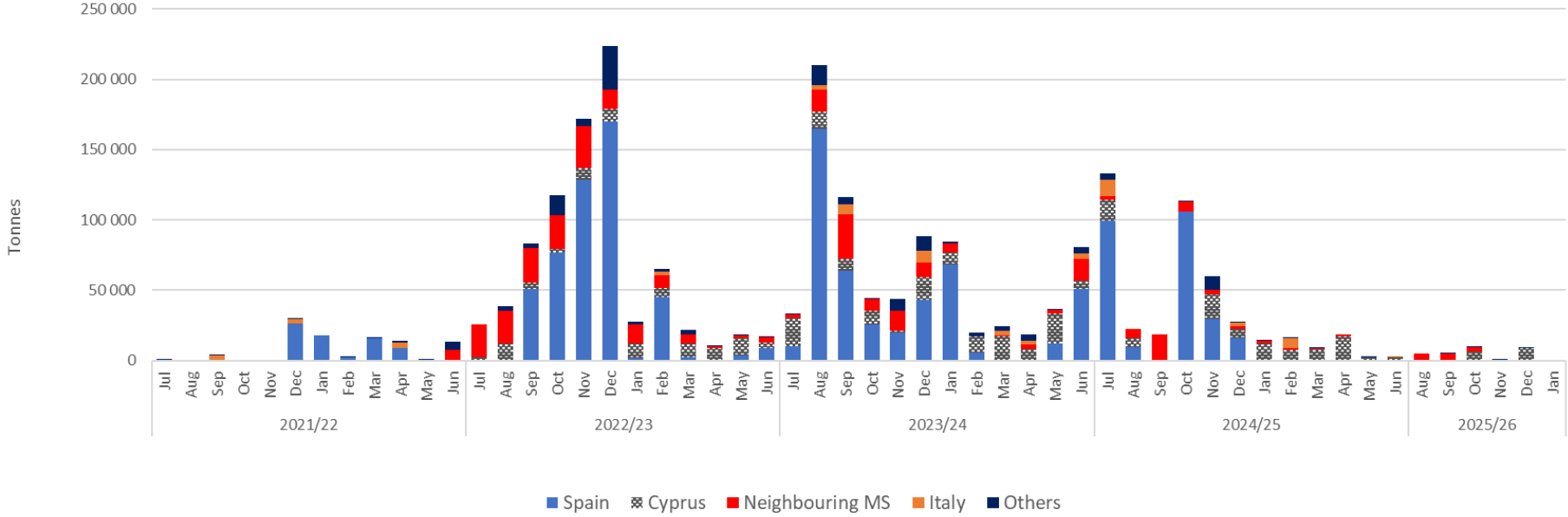


Source: Eurostat/Comext; share based on import data for July 2025 - January 2026

Source: Eurostat/Comext

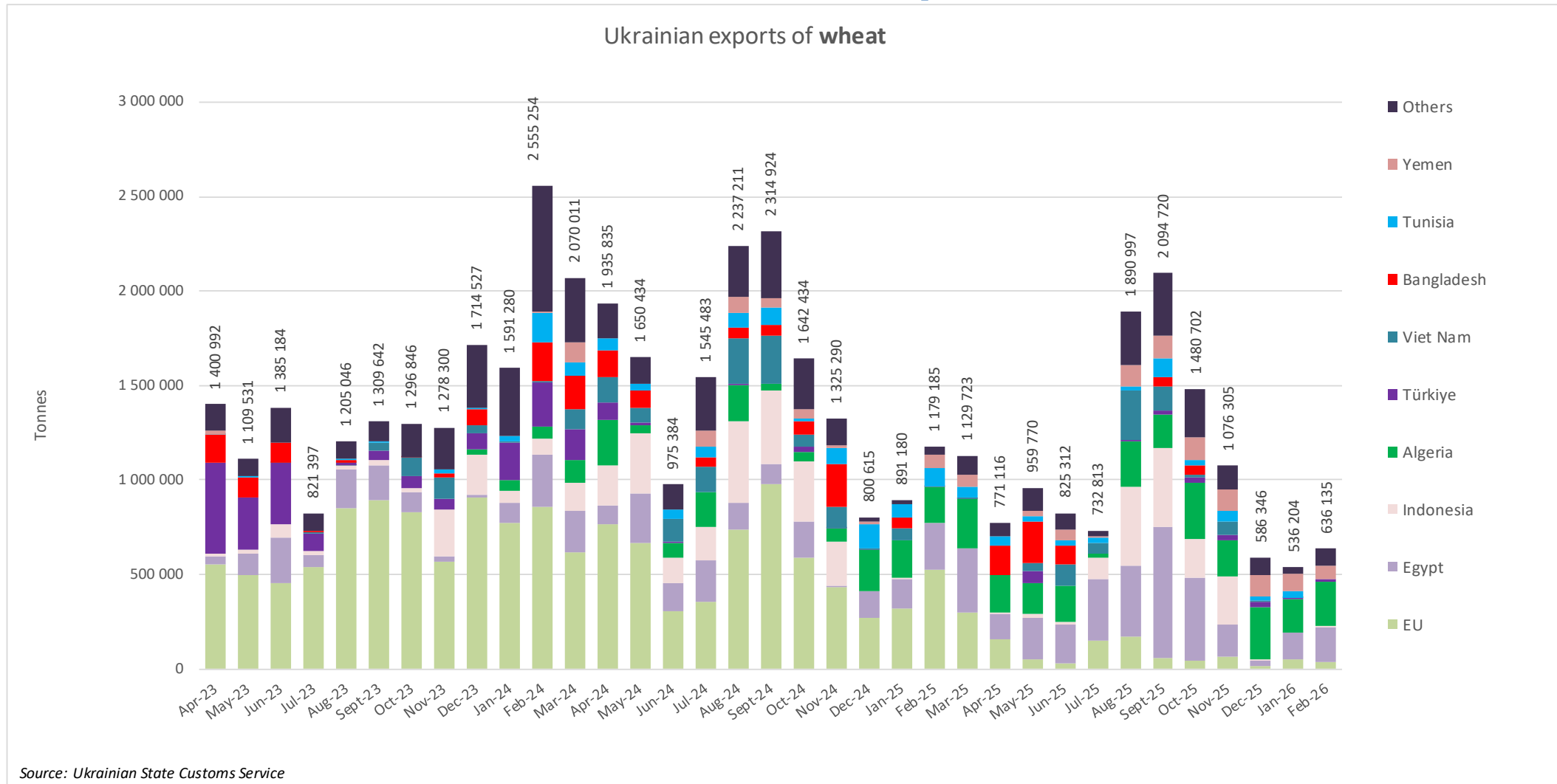
# EU imports from Ukraine - barley

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

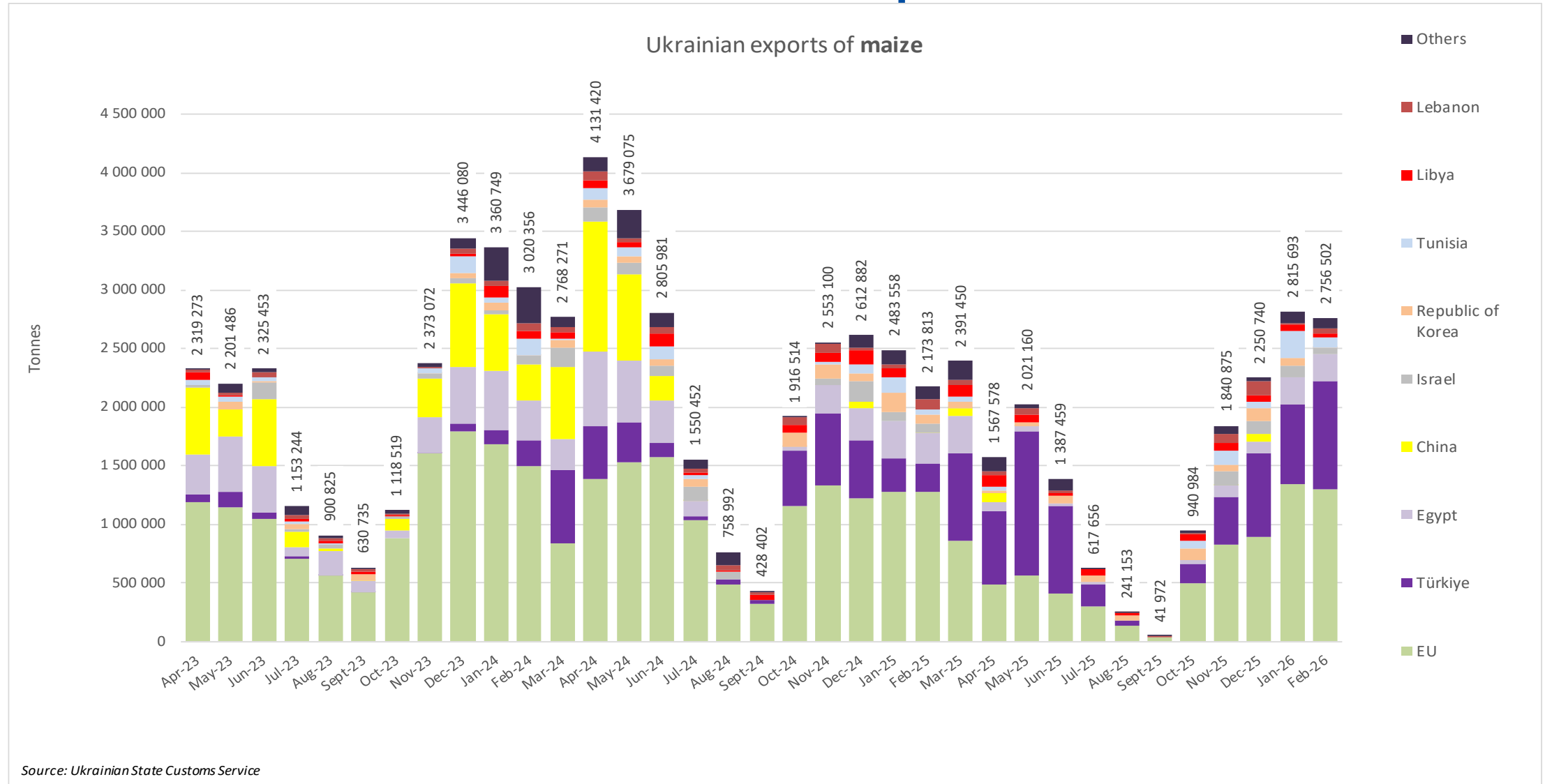


# Ukrainian cereals exports

# UA wheat exports

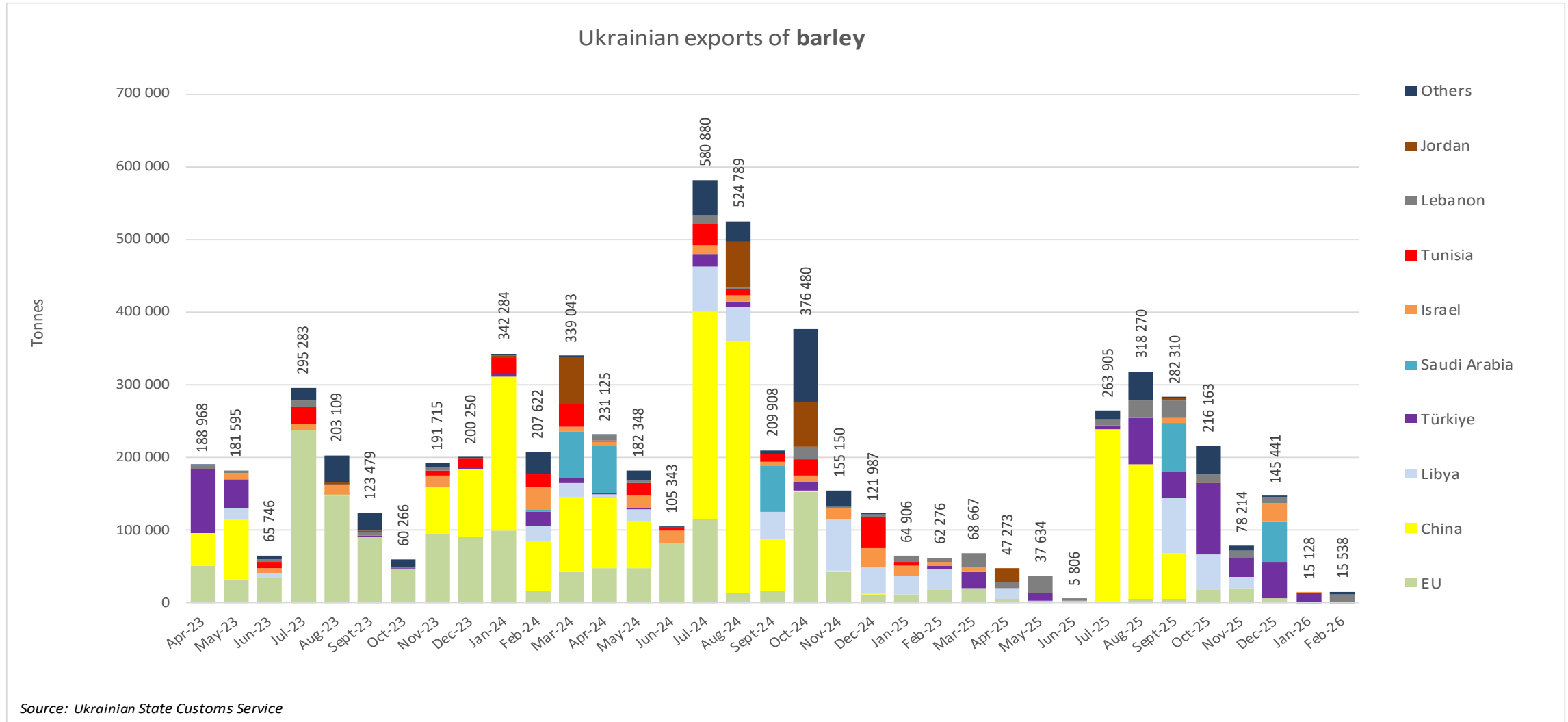


# UA maize exports



Source: Ukrainian State Customs Service

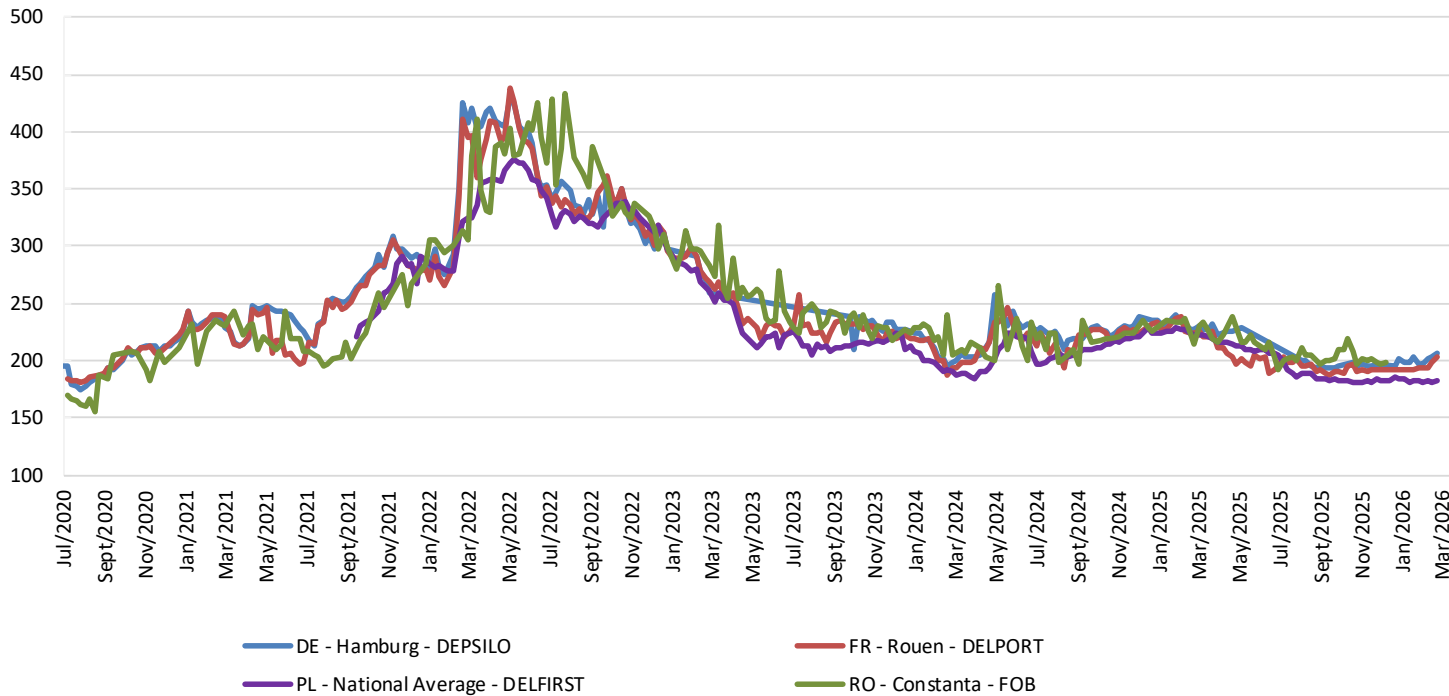
# UA barley exports



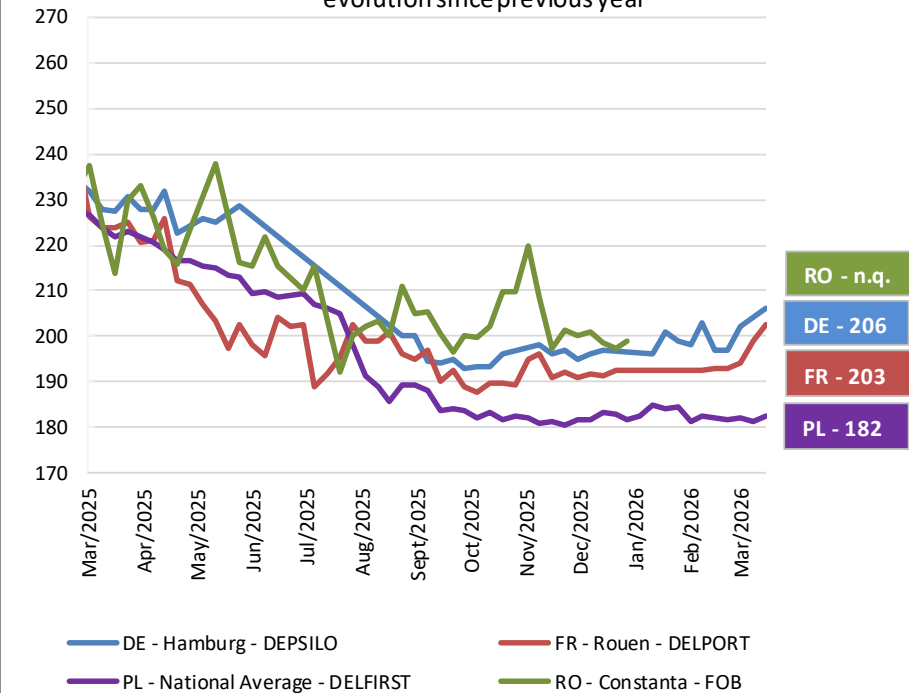
# EU cereals market prices

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

EU market prices for milling wheat (EUR/tonne)



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

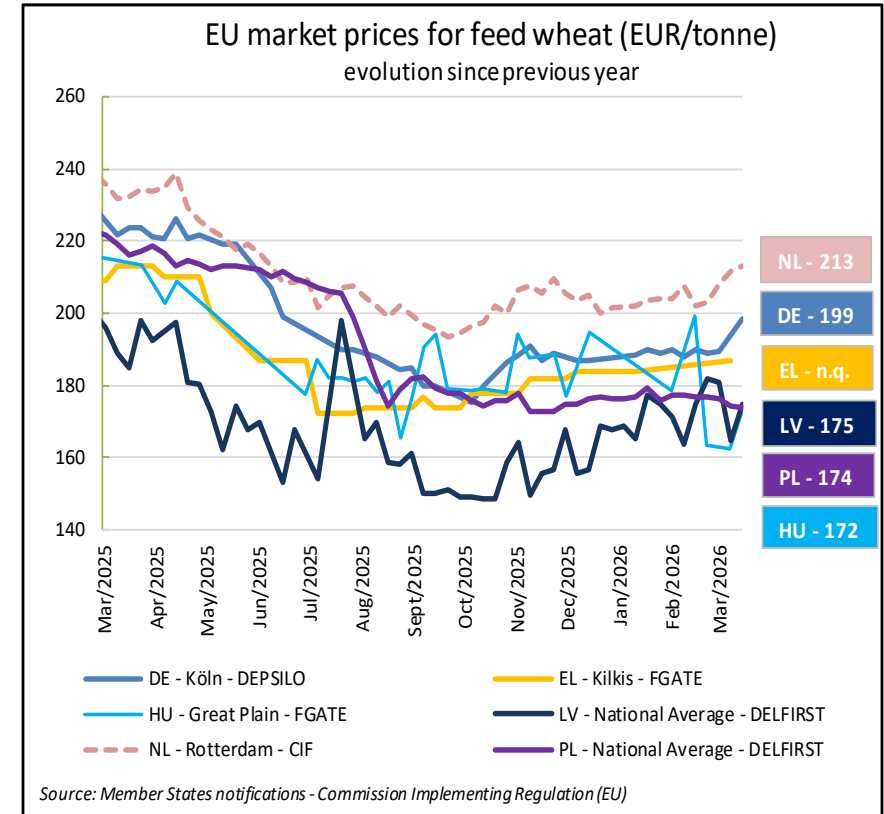
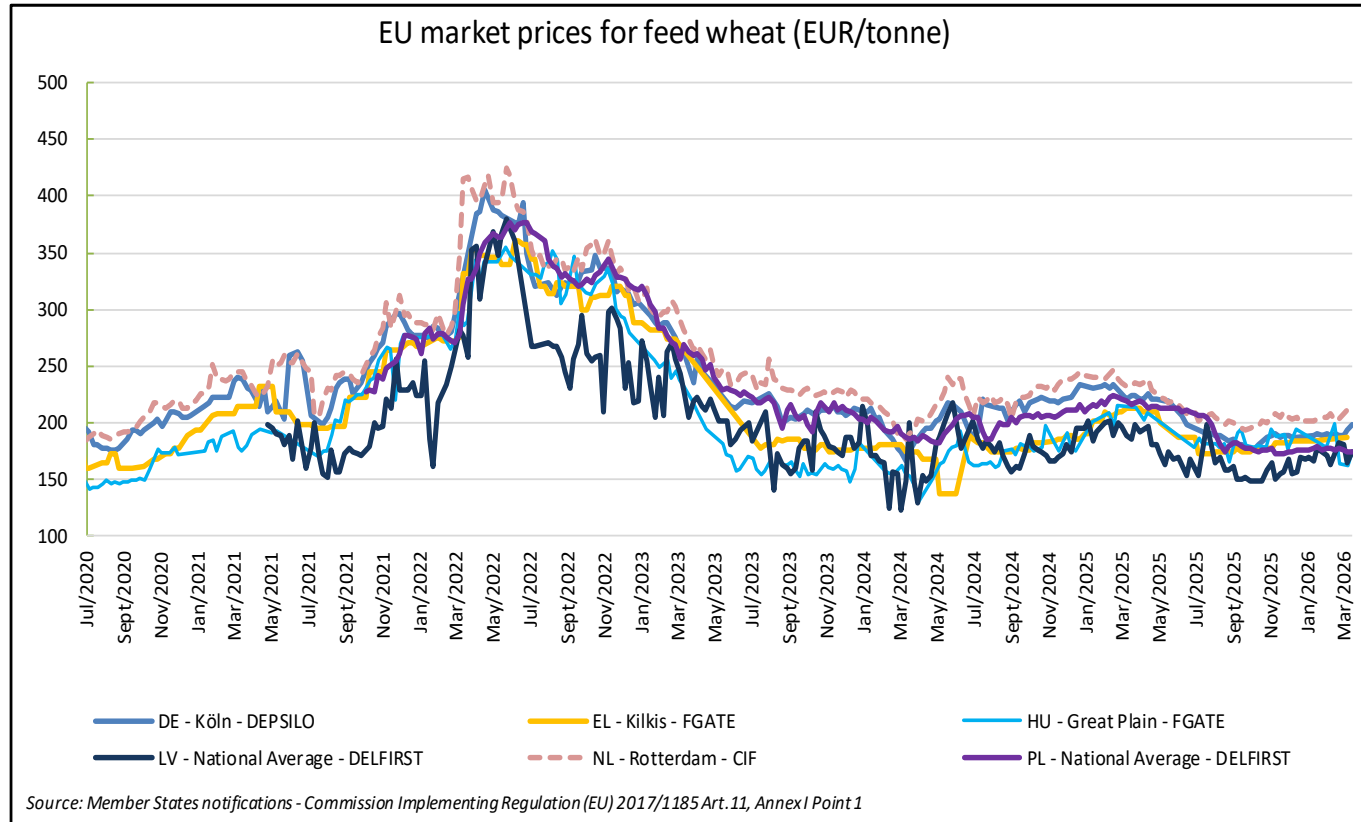


Source: Member States notifications - Commission Implementing Regulation (EU) 2017/1185 Art. 11, Annex I Point 1

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

**France (DELPORT Rouen)** • EUR 203 per tonne; 5.1% month-on-month; -9.5% year-on-year

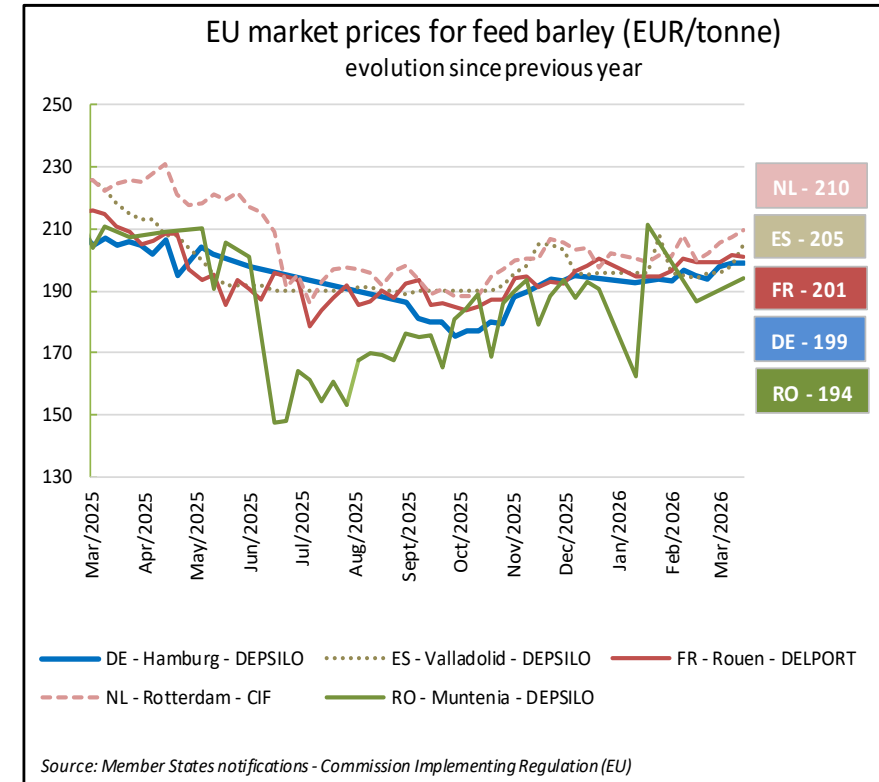
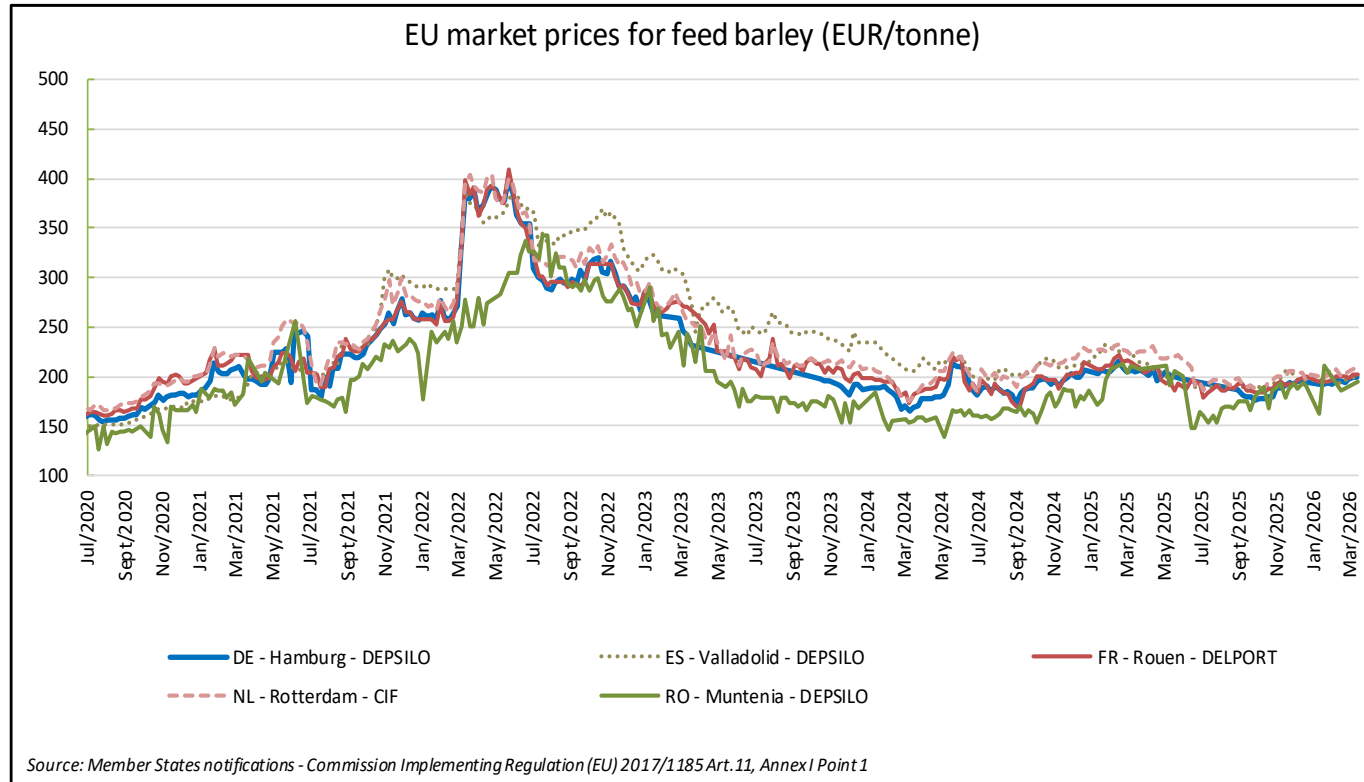
# EU market prices for feed wheat – (EUR per tonne)



**Poland**  
(DELFIRST –  
National average)

• EUR 174 per tonne; -1.5% month-on-month; -19.4% year-on-year

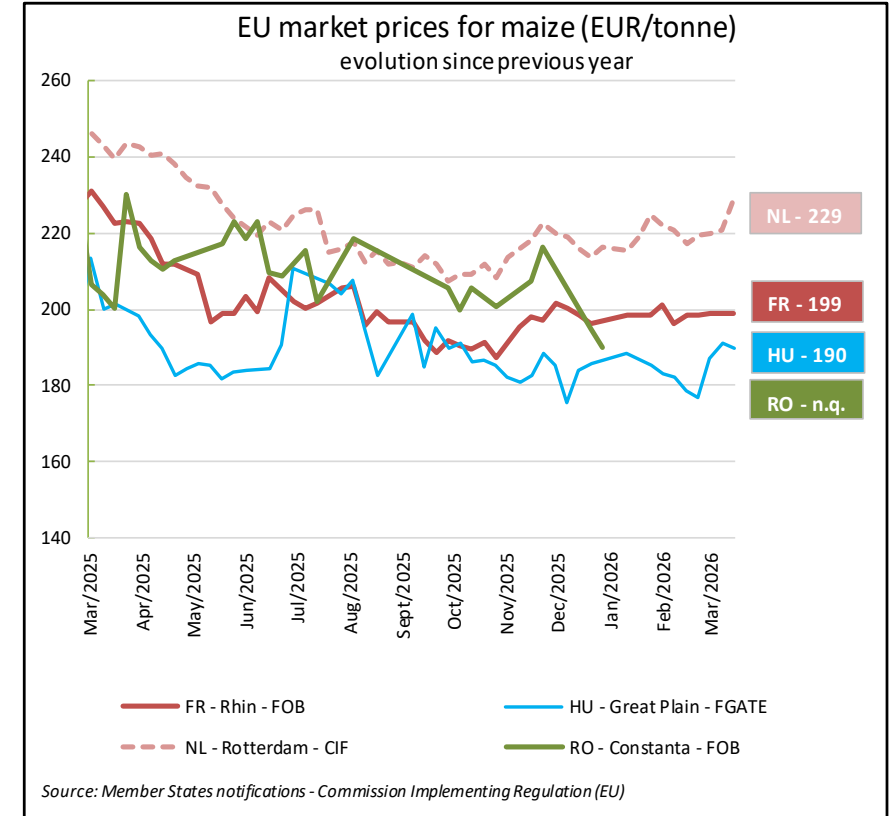
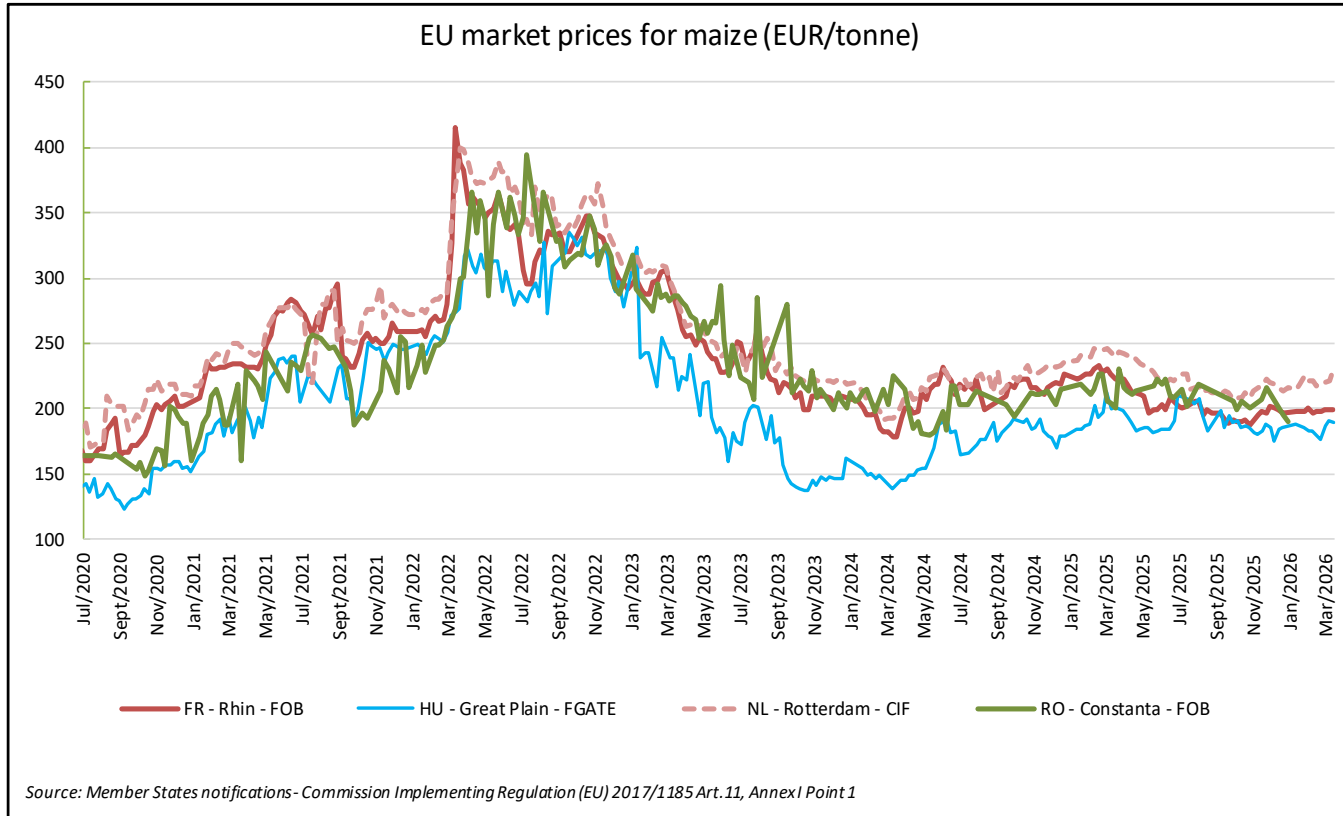
# EU market prices for feed barley – (EUR per tonne)



**France**  
(DELPOR Rouen)

• EUR 201 per tonne; 0.9% month-on-month; -4.5% year-on-year

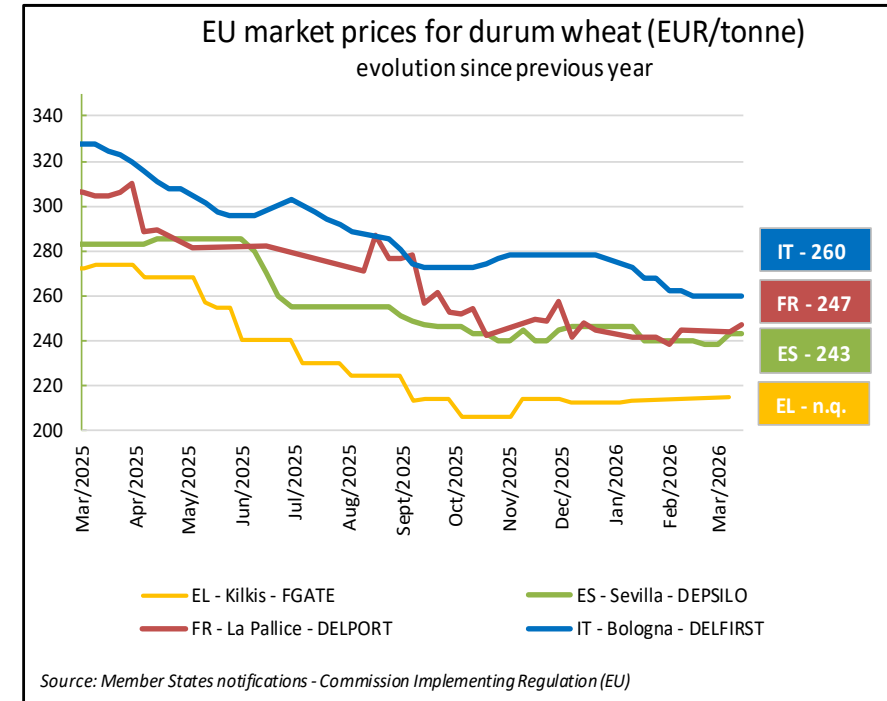
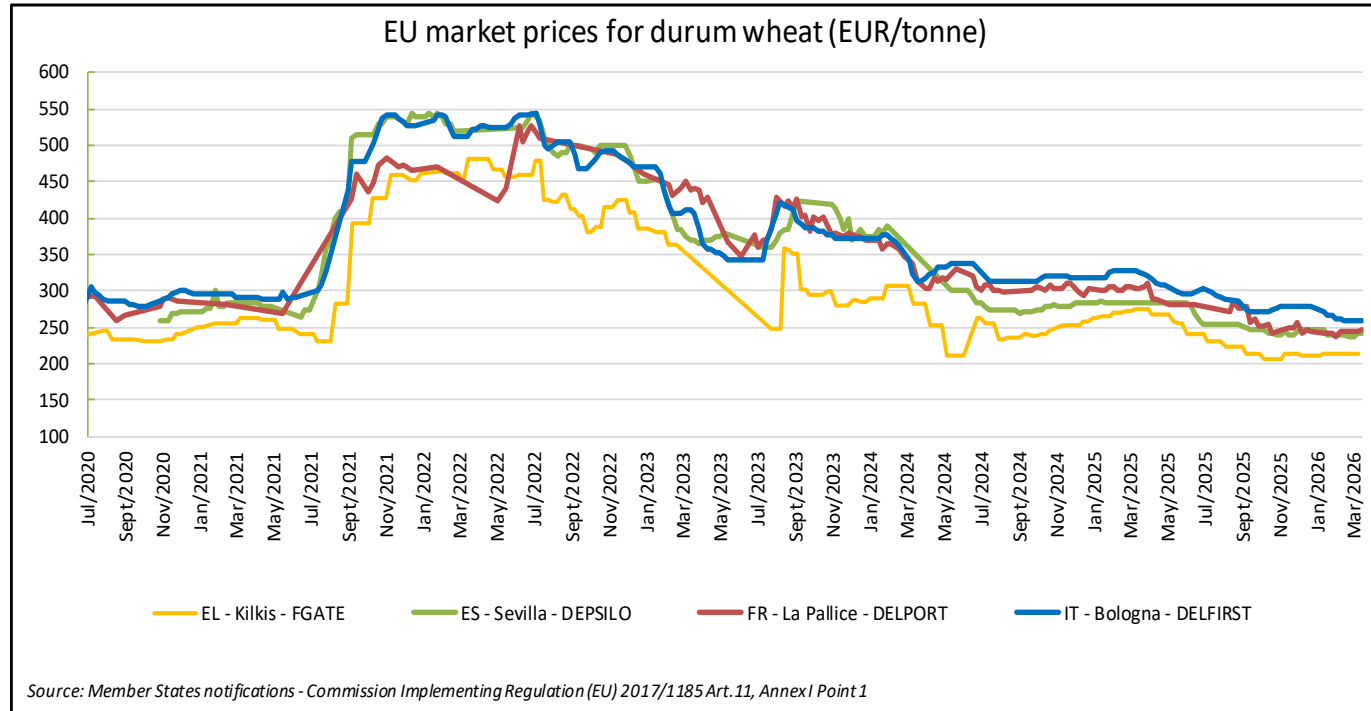
# EU market prices for maize – (EUR per tonne)



**France**  
(FOB Rhin)

• EUR 199 per tonne; 0.3% month-on-month; -10.6% year-on-year

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



**Italy**  
(DELFIRST Bologna)

- EUR 260 per tonne; 0.0% month-on-month; -20.0% year-on-year

# Last month evolution of EU cereal prices

- Compared to last month, milling wheat prices increased (+5.1%) while other cereal prices held rather steady (from -1.5% for feed wheat to +0.9% for feed barley). Representative cereal prices sometimes show a divergent evolution depending on the location and marketing stage.
- EU cereal representative prices remain lower than a year ago (from -4.5% for feed barley to -20.0% for durum wheat).

# Thank you

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



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