

Cereals market situation

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

31 Oct 2024

2024/2025 marketing year

EU27 2024/2025 Area

(million ha)

	2023/24	2024/25			
	Forecast	Sep Projection	Oct Projection	vs. 2023/24 (%)	vs. 5-year av. (%)
Soft wheat	21.9	20.4	20.3	-7.1	-6.8
Durum wheat	2.3	2.1	2.1	-8.4	-2.9
Barley	10.4	10.4	10.4	0.5	-1.1
Maize	8.3	8.8	8.8	6.3	-1.9
Rye	1.9	1.7	1.7	-7.9	-12.1
Oats	2.3	2.5	2.5	10.7	4.6
Total	50.6	49.6	49.4	-2.4	-4.4

Source: DG AGRI - E4

EU27 2024/2025 Production

(million tonnes)

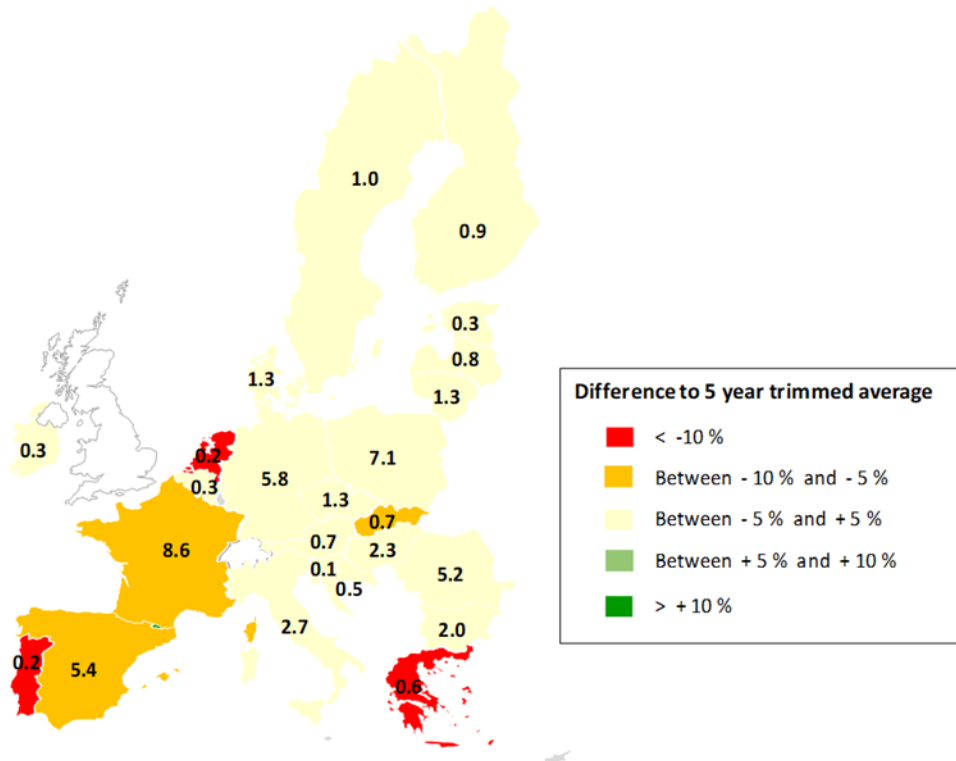
	2023/24 Forecast	2024/25			
		Sep Projection	Oct Projection	vs. 2023/24 (%)	vs. 5-year av. (%)
Soft wheat	125.2	114.6	112.6	-10.0	-11.1
Durum wheat	7.4	7.2	7.2	-2.9	-2.9
Barley	47.2	50.4	49.8	5.4	-4.8
Maize	61.3	60.1	58.0	-5.4	-12.5
Rye	7.4	7.1	6.9	-6.1	-11.2
Oats	5.8	8.0	7.9	36.0	10.0
Total	268.2	260.9	255.6	-4.7	-8.9

Source: DG AGRI - E4

Total cereals 2024/25 - area

Sep 2024 Projection

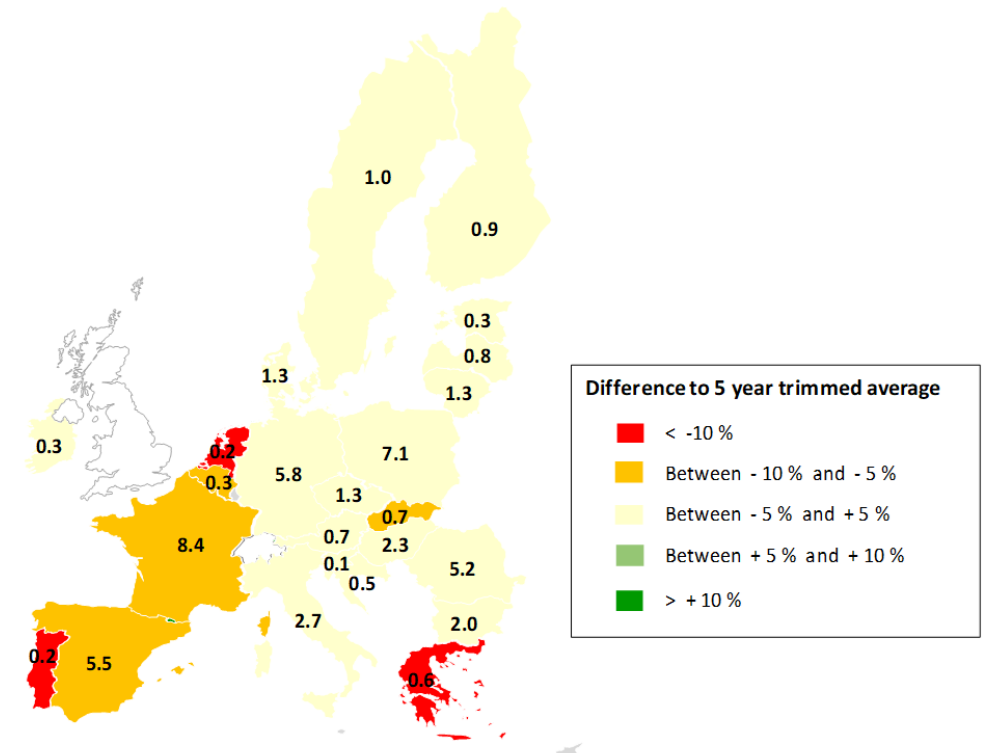
Total cereals area - 2024 projection (million hectares)



EU area: 49.6 million hectares - difference to 5 year trimmed average: -4.1%

Oct 2024 Projection

Total cereals area - 2024 projection (million hectares)



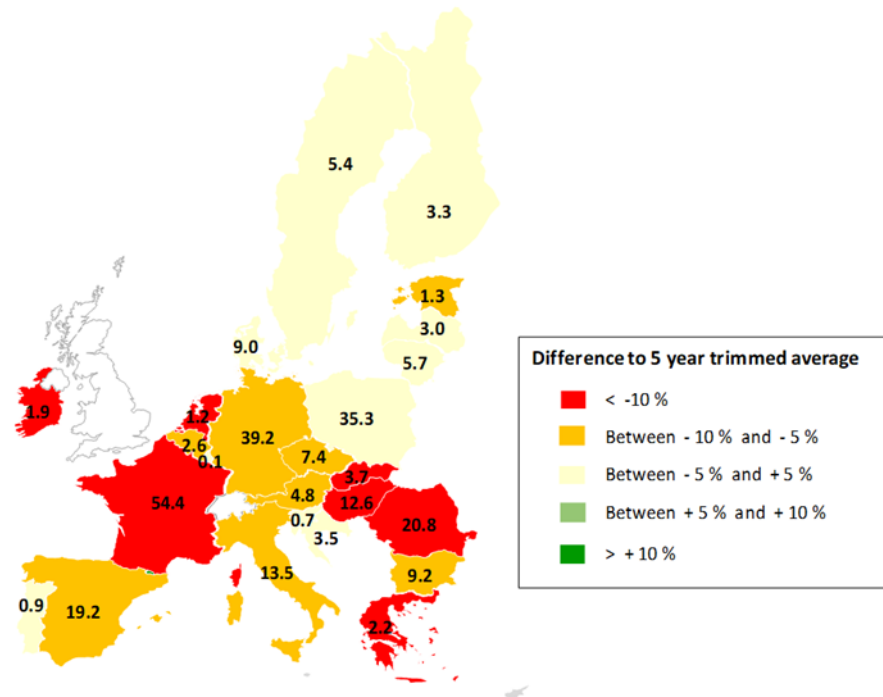
EU area: 49.4 million hectares - difference to 5 year trimmed average: -4.4%

Total cereals 2024/25 - production

Sep 2024 Projection

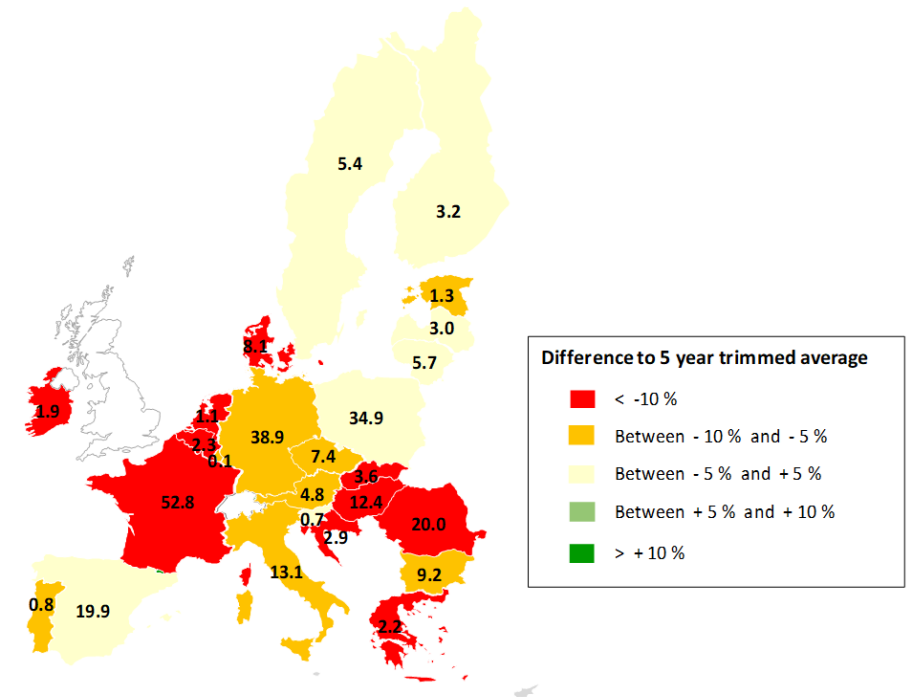
Oct 2024 Projection

Total cereals production - 2024 projection (million tonnes)



EU production: 260.9 million tonnes - difference to 5 year trimmed average: -7.2%

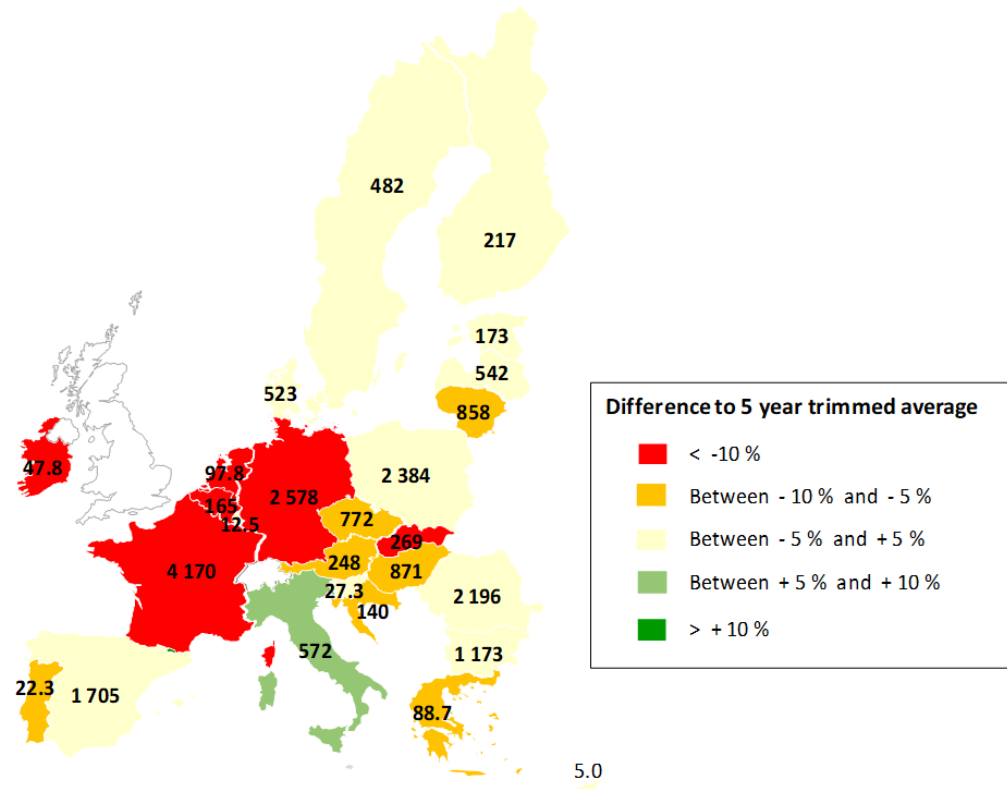
Total cereals production - 2024 projection (million tonnes)



EU production: 255.6 million tonnes - difference to 5 year trimmed average: -8.9%

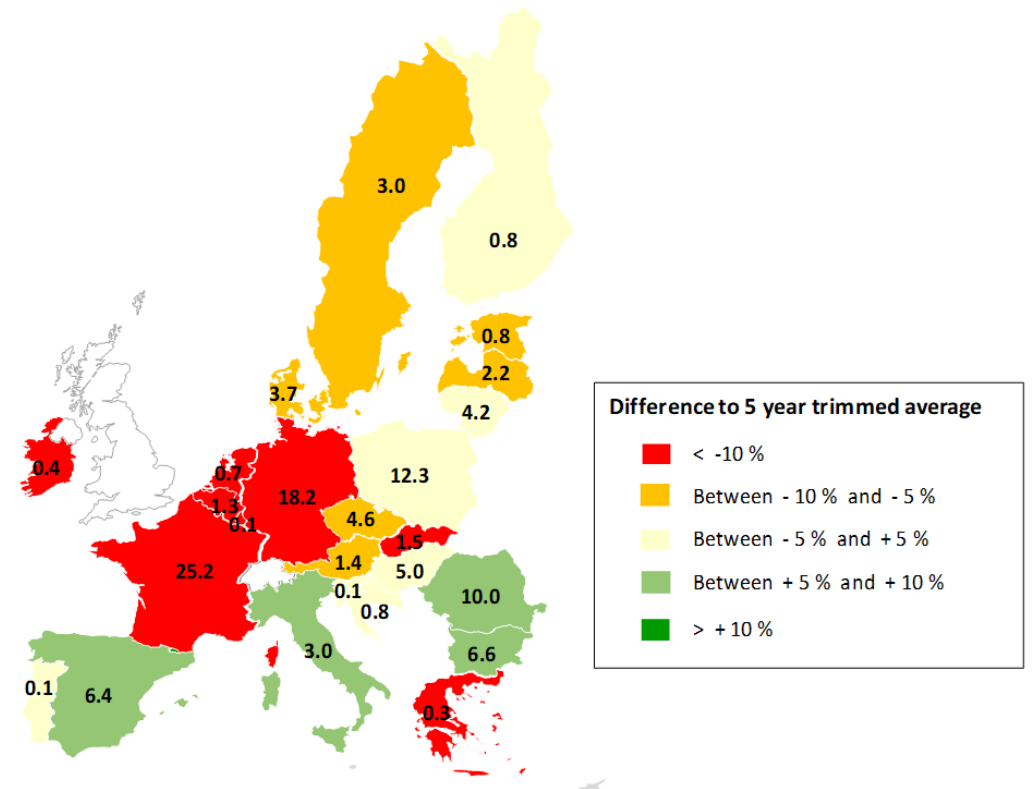
Soft wheat 2024/25

Soft wheat area - 2024 projection (thousand hectares)



EU area: 20 338 thousand hectares - difference to 5 year trimmed average: -7.1%

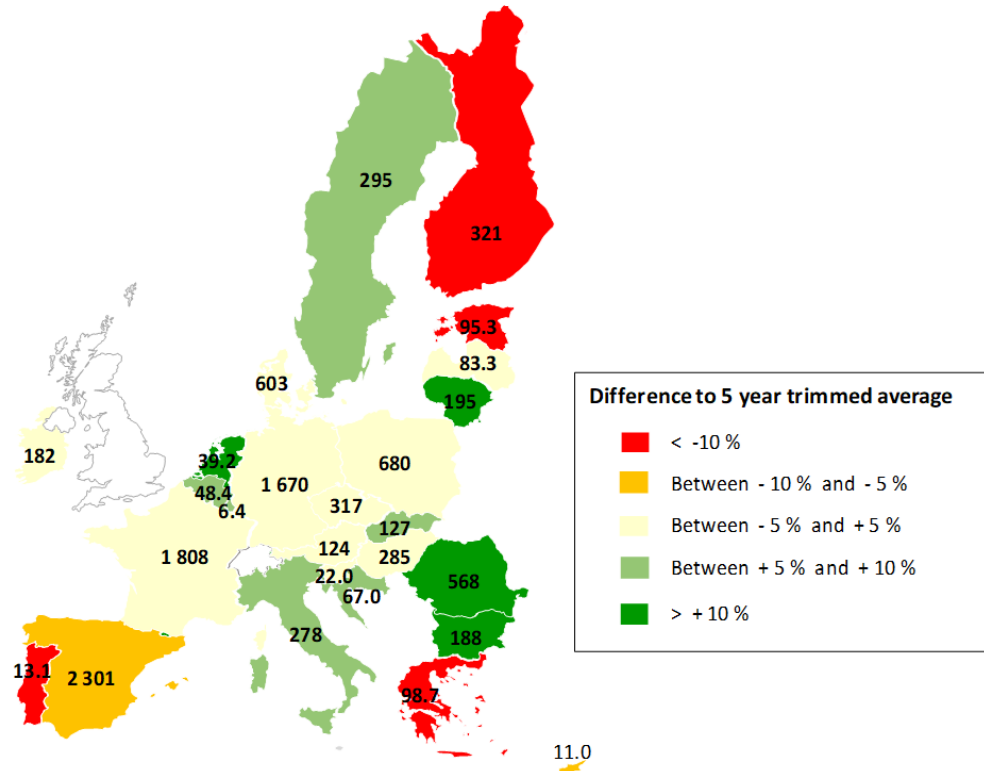
Soft wheat production - 2024 projection (million tonnes)



EU production: 112.6 million tonnes - difference to 5 year trimmed average: -11.1%

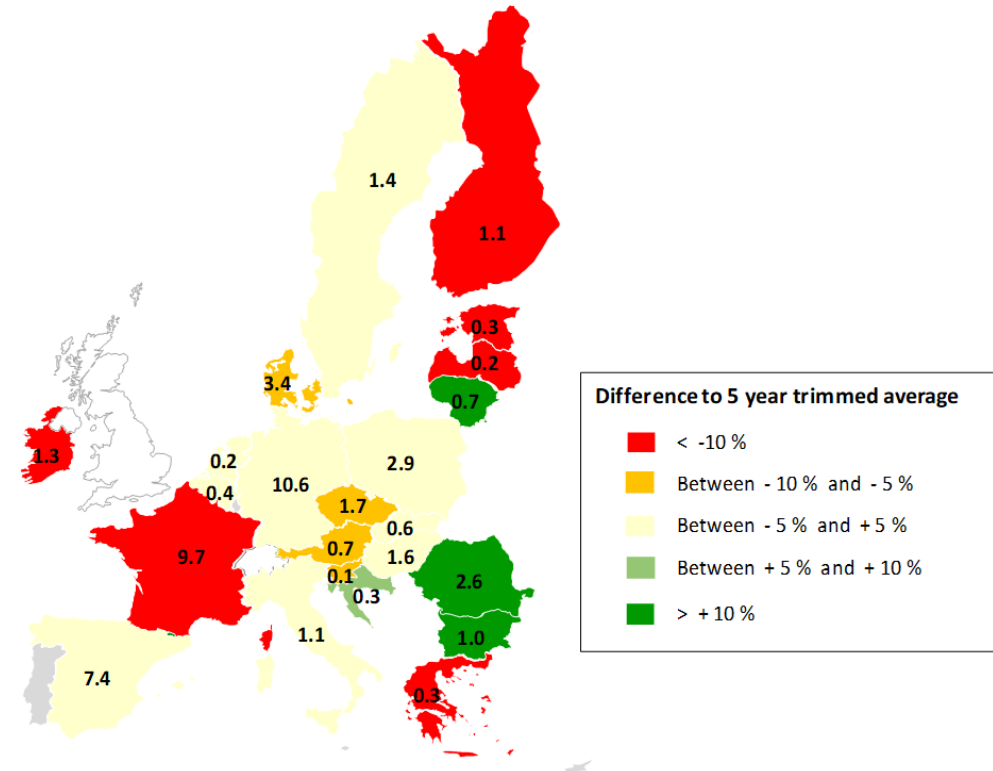
Barley 2024/25

Barley area - 2024 projection (thousand hectares)



EU area: 10 427 thousand hectares - difference to 5 year trimmed average: -1.3%

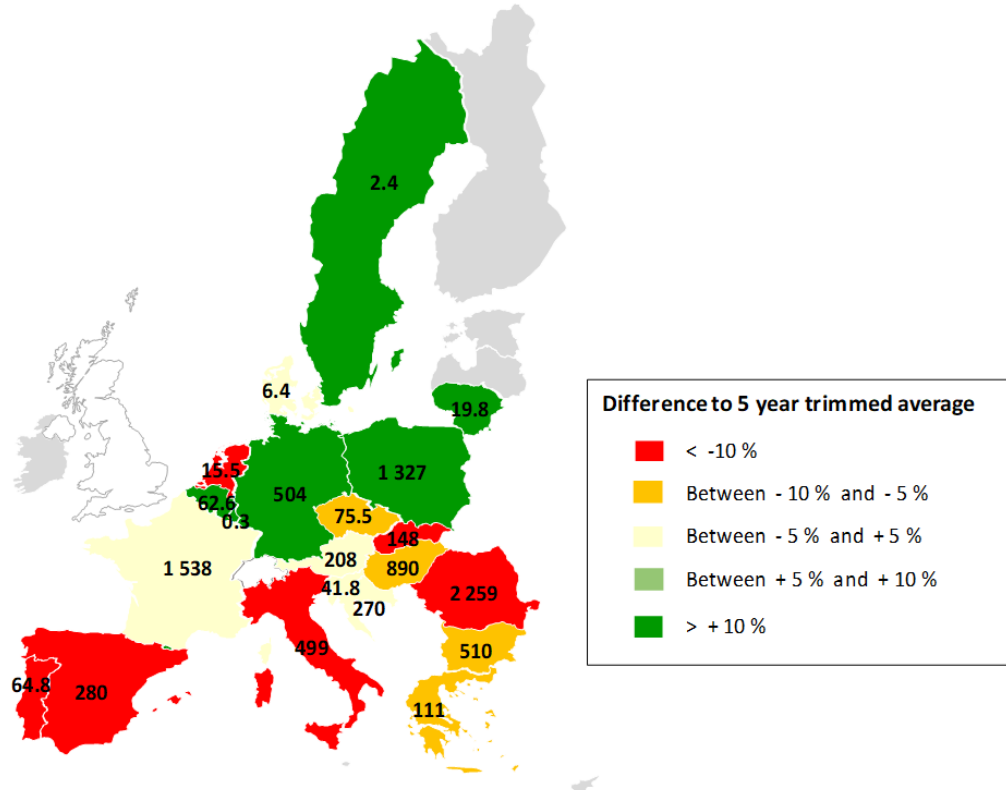
Barley production - 2024 projection (million tonnes)



EU production: 49.8 million tonnes - difference to 5 year trimmed average: -4.8%

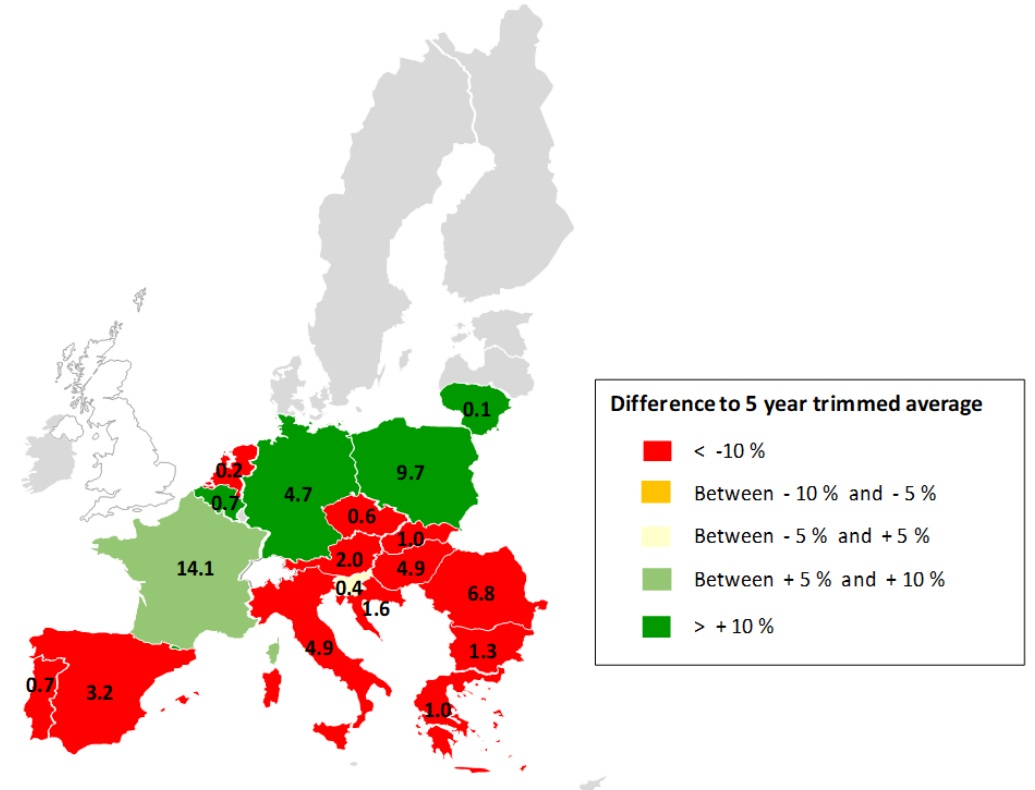
Maize 2024/25

Maize area - 2024 projection (thousand hectares)



EU area: 8 831 thousand hectares - difference to 5 year trimmed average: -1.9%

Maize production - 2024 projection (million tonnes)



EU production: 58 million tonnes - difference to 5 year trimmed average: -12.5%

EU 2024/2025 Usable Production: comparison with other forecasters

	<i>(million tonnes)</i>			
	EC DG AGRI 31-October	Stratégie Grains 10-October	COCERAL 19-September	COPA COGECA 10-July
Soft Wheat	112.6	114.4	114.9	117.5
Durum Wheat	7.2	7.5	7.5	6.9
Barley	49.8	50.6	50.2	43.0
Maize	58.0	58.1	60.2	62.4
Rye	6.9	7.0	7.4	
Total Cereals	255.6		260.6	257.3

2024/2025 – Production evolution

	month/month variation	year/year variation	vs. 5-year average
<i>France</i>	-2.9%	-18.0%	-17.3%
<i>Germany</i>	-1.0%	-7.7%	-9.0%
<i>Poland</i>	-1.3%	-1.6%	0.0%
<i>Romania</i>	-3.7%	-3.2%	-10.5%
<i>Spain</i>	3.6%	70.4%	-2.3%
<i>Italy</i>	-3.3%	-4.7%	-8.7%
<i>Hungary</i>	-2.0%	-17.3%	-16.3%

**: 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	20 338	165	1 173	772	523	2 578	173	48	89	1 705	4 170	140	572	5	542	858	13	871	98	248	2 384	22	2 196	27	269	217	482
	Yield	5.58	7.73	5.68	5.96	7.17	7.12	4.36	8.22	2.93	3.78	6.10	6.00	5.35	1.80	4.15	4.94	5.20	5.82	7.17	5.76	5.18	2.35	4.61	5.40	5.54	3.59	6.18
	Production	113 502	1 273	6 659	4 600	3 749	18 357	756	393	259	6 450	25 428	839	3 058	9	2 252	4 234	65	5 068	701	1 427	12 348	52	10 127	147	1 492	778	2 981
Durum wheat	Area	2 118	0	20	5	0	49	0	0	173	266	239	0	1 190	7	0	0	0	51	0	26	0	4	8	0	80	0	0
	Yield	3.44		5.00	5.15		5.89			3.24	2.63	5.08	5.00	2.94	2.14		3.33	3.71	5.34		5.31		2.79	2.64		5.54		
	Production	7 287	0	100	25	0	286	0	0	560	699	1 211	2	3 500	16	0	1	1	271	0	139	0	12	22	0	443	0	0
Barley	Area	10 427	48	188	317	603	1 670	95	182	99	2 301	1 808	67	278	11	83	195	6	285	39	124	680	13	568	22	127	321	295
	Yield	4.81	7.36	5.42	5.32	5.71	6.41	3.47	7.26	2.57	3.26	5.42	5.00	3.94	1.75	2.93	3.78	5.13	5.53	6.17	5.70	4.33	3.69	4.61	4.56	4.78	3.40	4.62
	Production	50 193	356	1 019	1 687	3 445	10 705	331	1 319	253	7 510	9 801	335	1 098	19	244	737	33	1 576	242	709	2 947	48	2 619	100	606	1 090	1 363
Grain maize	Area	8 831	63	510	75	6	504	0	0	111	280	1 538	270	499	0	0	20	0	890	16	208	1 327	65	2 259	42	148	0	2
	Yield	6.60	10.50	2.64	7.76	7.20	9.44			9.26	11.61	9.24	6.10	9.94			6.20	6.69	5.53	11.70	9.59	7.31	10.12	3.01	9.19	6.63		7.43
	Production	58 243	657	1 348	585	46	4 755	0	0	1 024	3 250	14 209	1 647	4 955	0	0	123	2	4 923	181	1 996	9 701	656	6 800	384	982	0	18
Rye	Area	1 714	1	6	24	106	532	18	0	7	97	29	2	4	0	34	26	1	23	2	32	691	14	11	1	8	17	29
	Yield	4.14	4.00	1.91	4.45	5.67	5.19	3.99		1.98	2.26	3.80	3.18	3.05		3.90	2.79	4.94	3.22	3.20	3.98	3.56	0.91	2.79	4.08	3.28	3.14	5.94
	Production	7 092	3	12	108	601	2 759	73	0	15	218	110	5	12	0	131	73	7	72	5	127	2 461	13	29	4	27	53	173
Oats	Area	2 541	3	25	53	62	157	48	30	59	520	78	16	95	0	108	111	1	25	1	17	524	21	78	1	12	327	168
	Yield	3.16	4.67	2.20	3.87	5.08	4.46	3.11	7.78	1.21	2.23	3.86	2.88	2.20	1.15	2.88	2.40	4.78	3.10	4.95	3.87	3.17	1.12	2.36	3.18	2.66	3.73	4.21
	Production	8 017	15	55	204	314	700	150	232	71	1 159	301	46	209	0	310	266	6	79	7	67	1 661	24	185	2	33	1 217	706
Sorghum	Area	229	0	6	0	0	0	0	0	2	4	102	0	41	0	0	0	0	45	0	5	0	0	16	0	8	0	0
	Yield	4.87		2.33						3.26	4.29	5.18		6.01					5.00		6.62			1.36	3.83	2.86		
	Production	1 117	0	14	0	0	0	0	0	7	18	528	0	244	0	0	0	0	225	0	36	0	0	22	0	23	0	0
Triticale	Area	2 381	3	19	44	4	269	6	0	13	251	254	7	14	1	7	83	5	57	1	50	1 156	13	74	5	13	7	25
	Yield	4.29	6.09	3.93	4.80	6.40	5.76	5.20		2.19	2.46	4.30	4.57	4.46	1.85	4.12	3.23	5.39	4.12	4.93	5.08	4.40	1.44	4.22	4.71	2.78	3.99	5.54
	Production	10 208	20	75	211	26	1 552	33	0	28	617	1 092	32	64	1	27	268	26	233	4	256	5 084	19	312	23	37	28	141
Other cereals	Area	820	1	4	6	9	26	8	0	1	48	181	1	18	0	22	47	0	13	1	12	386	1	4	5	2	17	7
	Yield	2.69	4.43	1.81	1.80	3.67	4.40	1.26		1.55	2.13	3.18	0.88	2.83		1.20	1.30	4.38	1.57	0.00	2.78	2.75	0.69	1.05	0.65	0.99	3.06	3.29
	Production	2 204	4	8	10	33	116	10	0	2	102	576	1	52	0	26	61	2	21	0	33	1 063	1	4	3	2	51	24
Total cereals	Area	49 400	284	1 952	1 296	1 313	5 784	350	259	553	5 472	8 398	503	2 711	24	795	1 340	27	2 259	157	724	7 149	154	5 214	102	668	904	1 009
	Yield	5.22	8.20	4.76	5.74	6.25	6.78	3.87	7.50	4.01	3.66	6.34	5.78	4.87	1.87	3.76	4.30	5.18	5.52	7.27	6.62	4.93	5.34	3.86	6.49	5.45	3.56	5.36
	Production	257 863	2 329	9 289	7 431	8 213	39 230	1 353	1 943	2 219	20 025	53 255	2 906	13 192	45	2 990	5 762	140	12 468	1 140	4 791	35 265	825	20 120	664	3 645	3 216	5 405

MAJ 20241031

EU 2024/2025 Cereals Balance Sheet

(thousand metric tonnes)

last updated: 31/10/2024

	2024/25 proj.									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
Beginning stocks	17 209	3 801	772	19 498	734	149	740	1 349	253	44 506
Usable production	112 617	49 766	7 210	57 999	6 936	1 061	7 929	10 004	2 100	255 622
Area (thousand ha)	20 338	10 427	2 118	8 831	1 714	229	2 541	2 381	820	49 400
Yield (tonnes/ha)	6	5	3	7	4	5	3	4	3	5
Imports (from third countries)	7 000	1 699	3 020	19 000	129	47	126	1	155	31 177
Total supply	136 826	55 266	11 002	96 497	7 799	1 257	8 794	11 355	2 508	331 304
Total domestic use	101 440	42 094	9 001	76 101	7 573	909	6 425	11 057	2 441	257 042
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	45 300	32 500	300	58 600	2 652	718	4 814	10 000	1 966	156 850
Losses	676	299	43	348	42	6	48	60	13	1 534
Exports (to third countries)	25 000	10 000	720	3 000	200	15	159	5	18	39 116
Total use	126 440	52 094	9 721	79 101	7 773	924	6 584	11 062	2 460	296 158
Ending stocks**	10 386	3 172	1 282	17 396	25	333	2 211	293	48	35 146
Change in stocks**	-6 823	-629	510	-2 103	-709	184	1 471	-1 057	-204	-9 360

* Marketing year: from July to June

** At the end of the marketing year

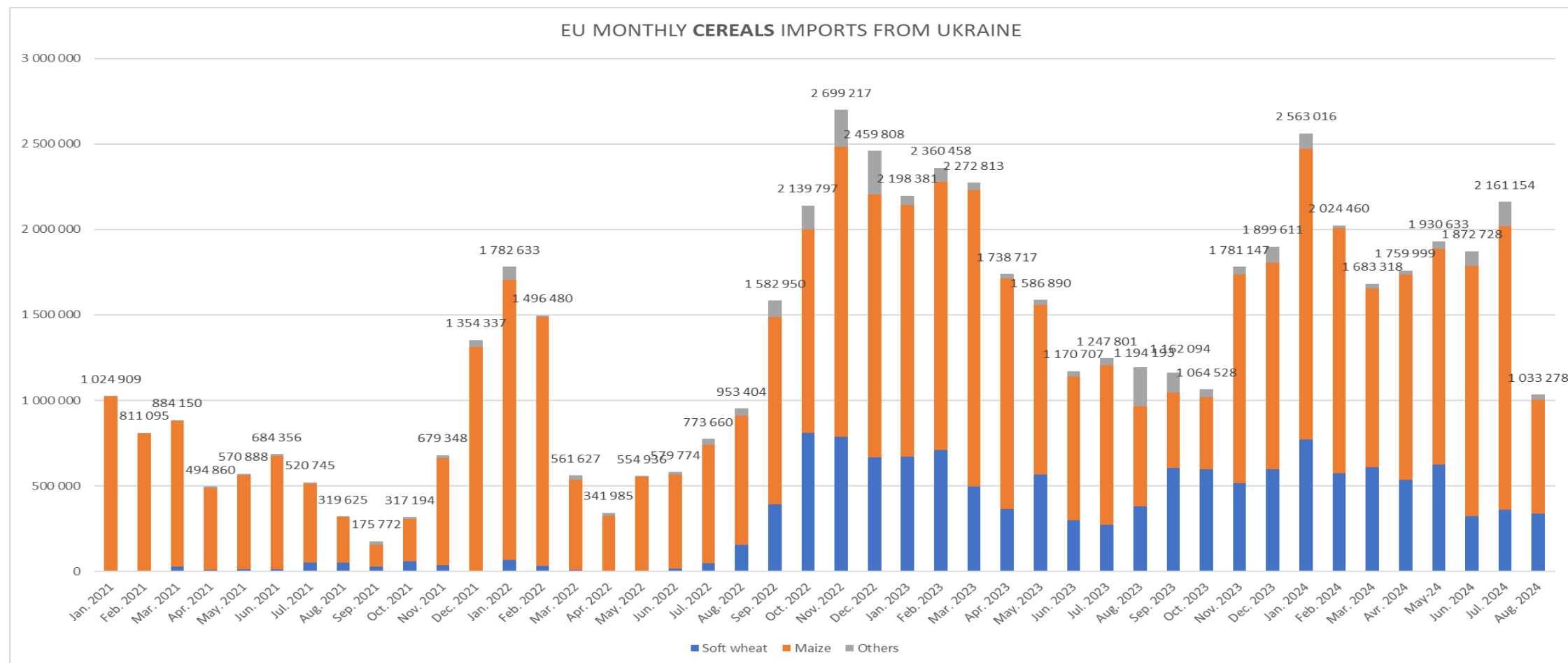
EU Cereals Balance Sheet 2024/2025 (Summary)

- Total **EU cereals production** is projected at **255.6 million tonnes** (-5.3 million tonnes compared to September). It is 8.9% below the five-year trimmed average and -4.7 % year-on-year.
- **Soft wheat** production was revised down by 2.0 million tonnes, **barley** by 0.6 million tonnes and **maize** by 2.1 million tonnes.
- The projection is based on notifications on **area** and **production** from EUROSTAT and **yield** forecasts from JRC MARS Bulletin when EUROSTAT data were not updated.
- **Trade** projections for soft wheat were modified based on the updated production figures and the current pace of trade.

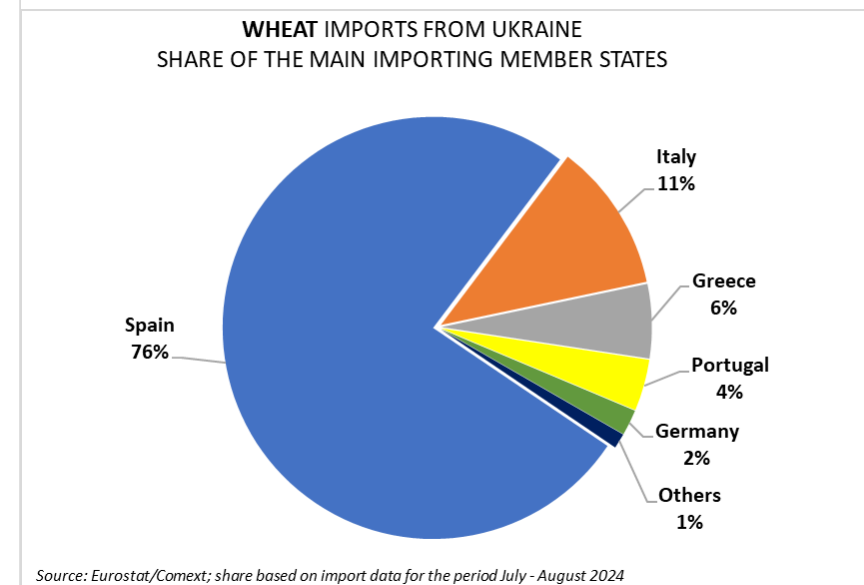
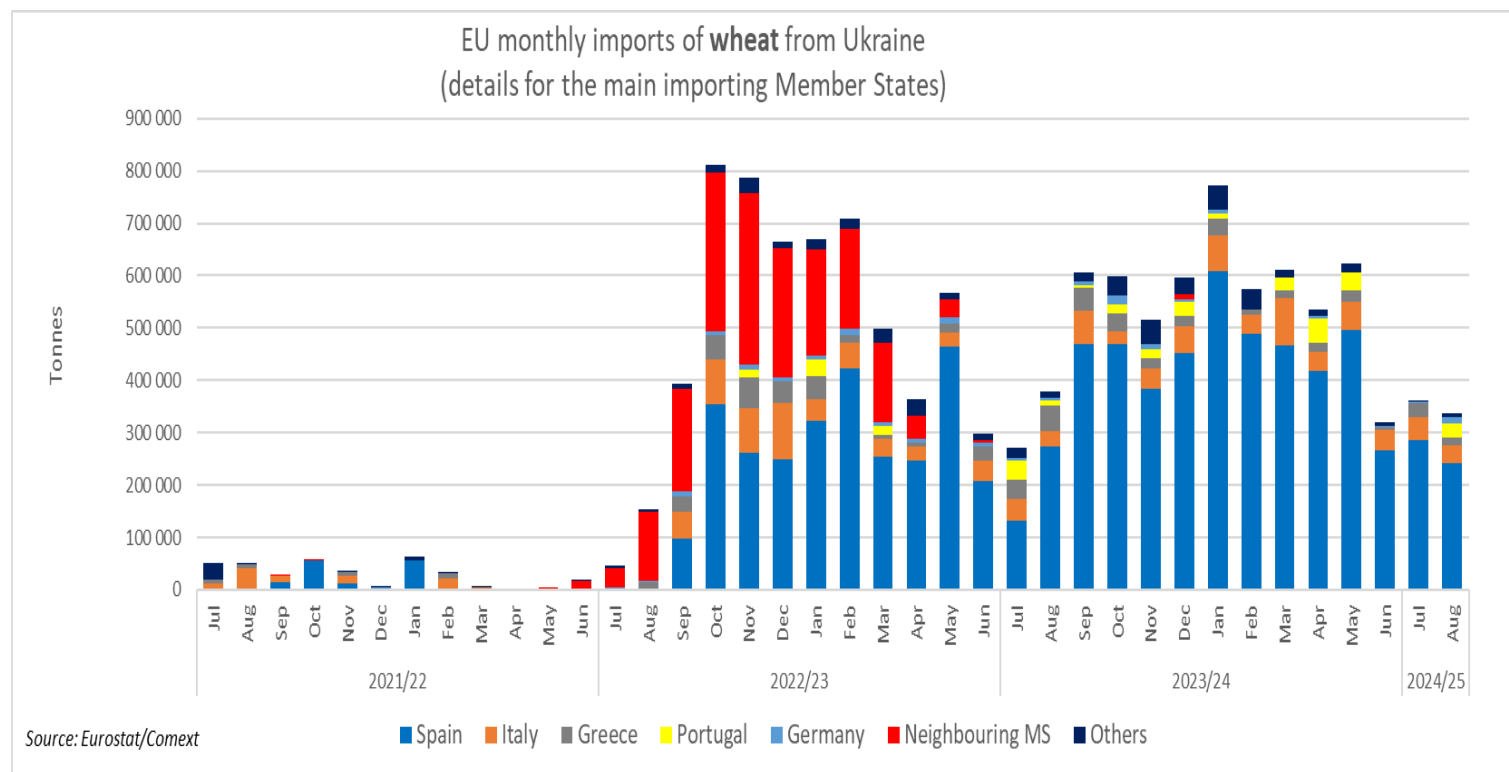
Focus on EU imports from Ukraine

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

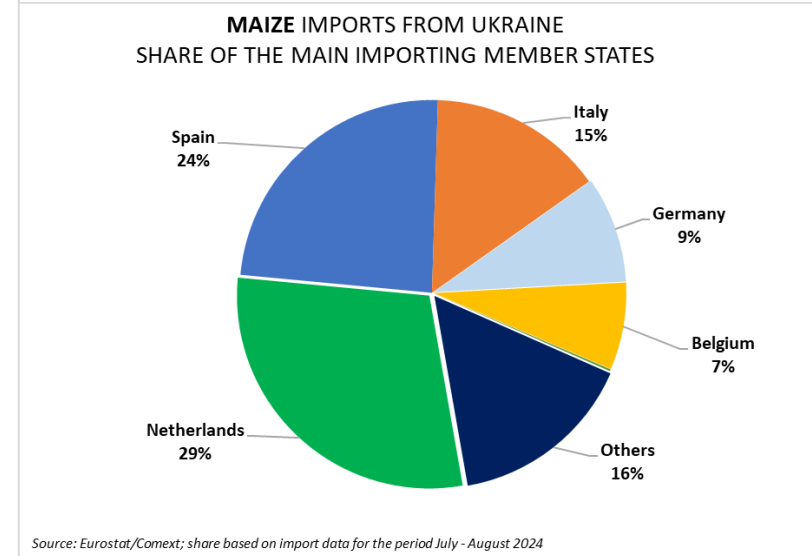
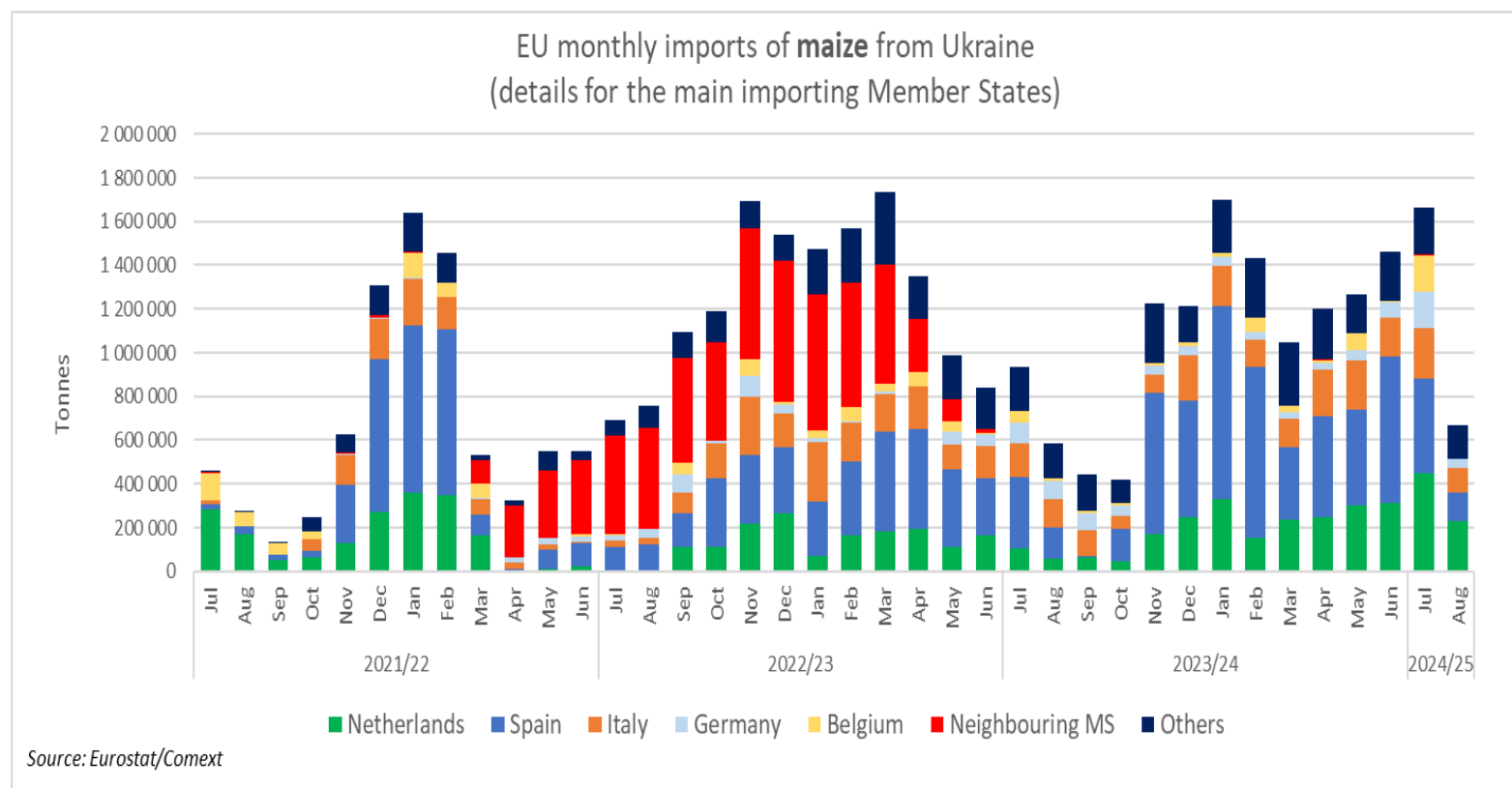
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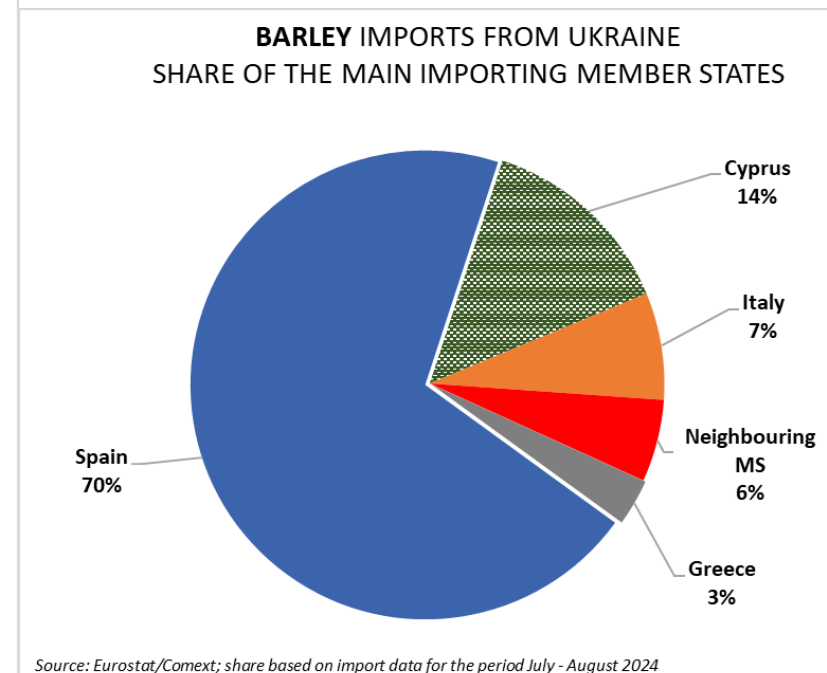
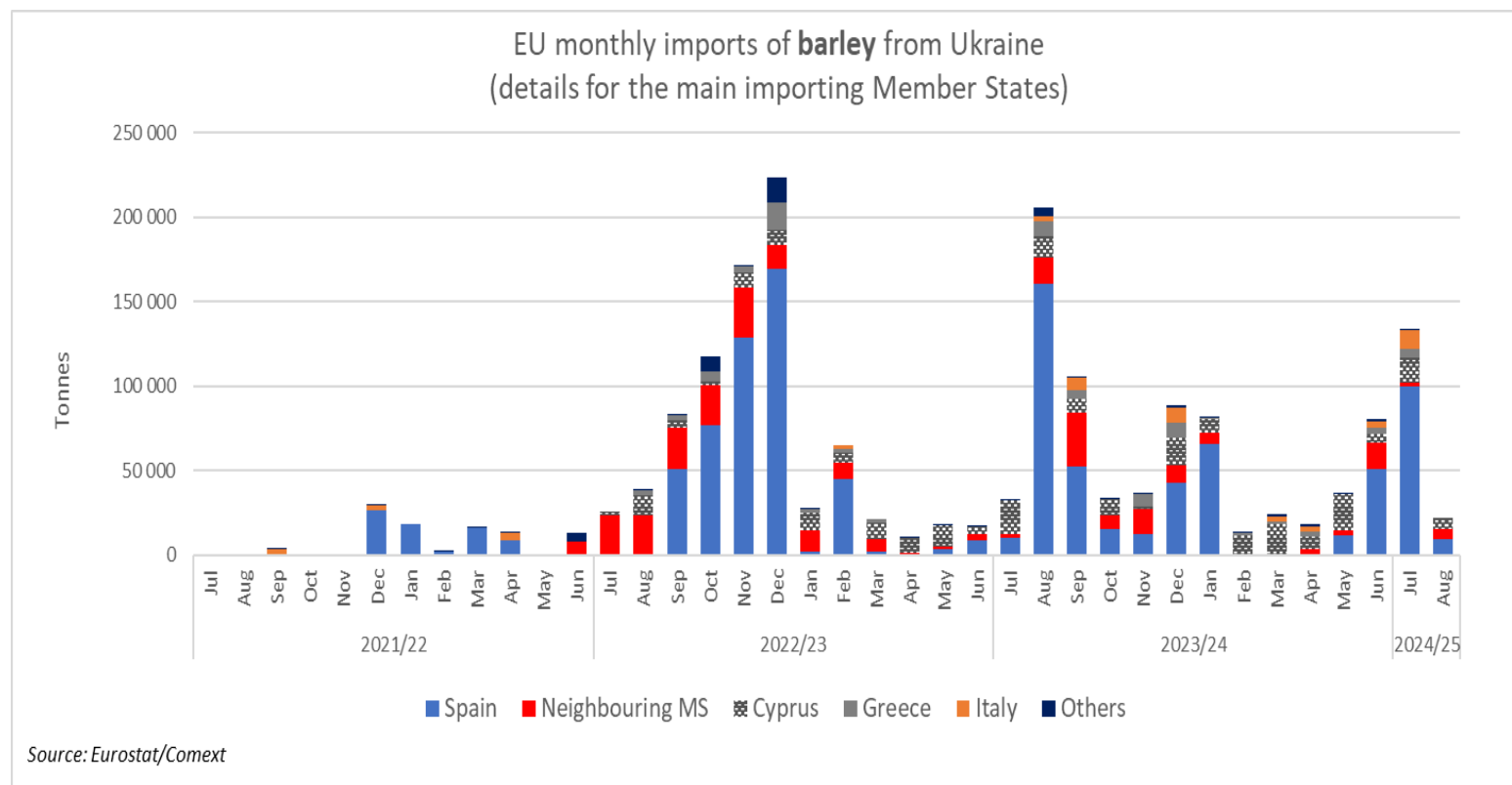
EU imports from Ukraine - wheat



EU imports from Ukraine - maize

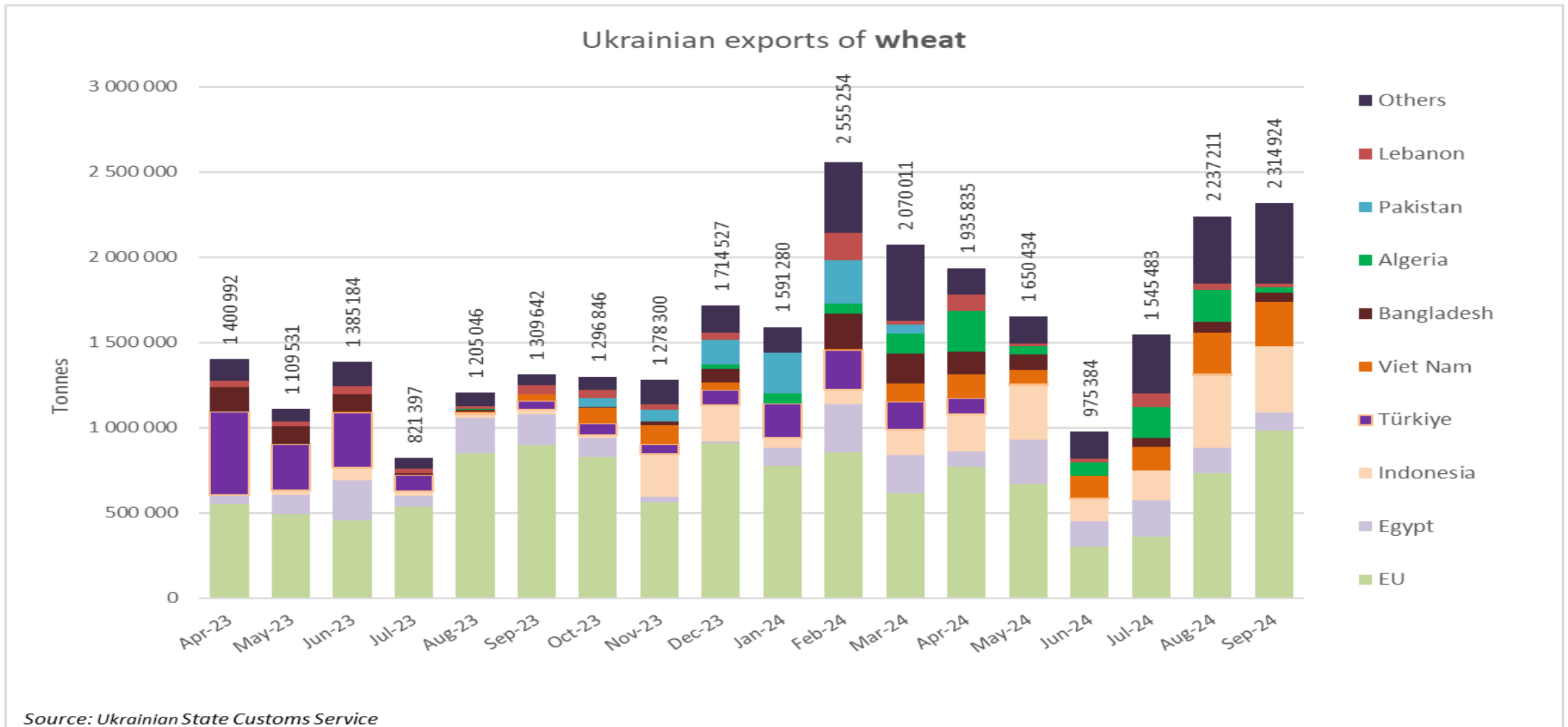


EU imports from Ukraine - barley

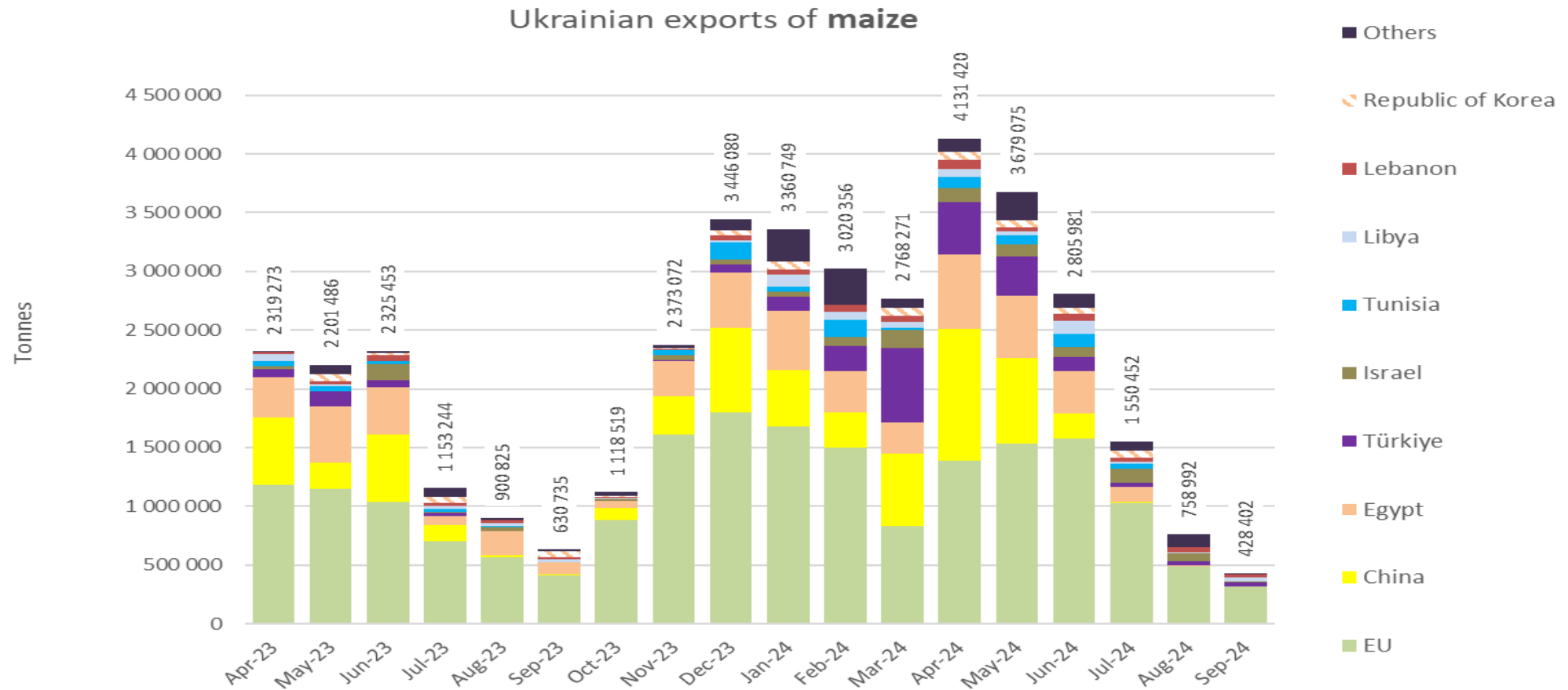


Ukrainian cereals exports

UA wheat exports

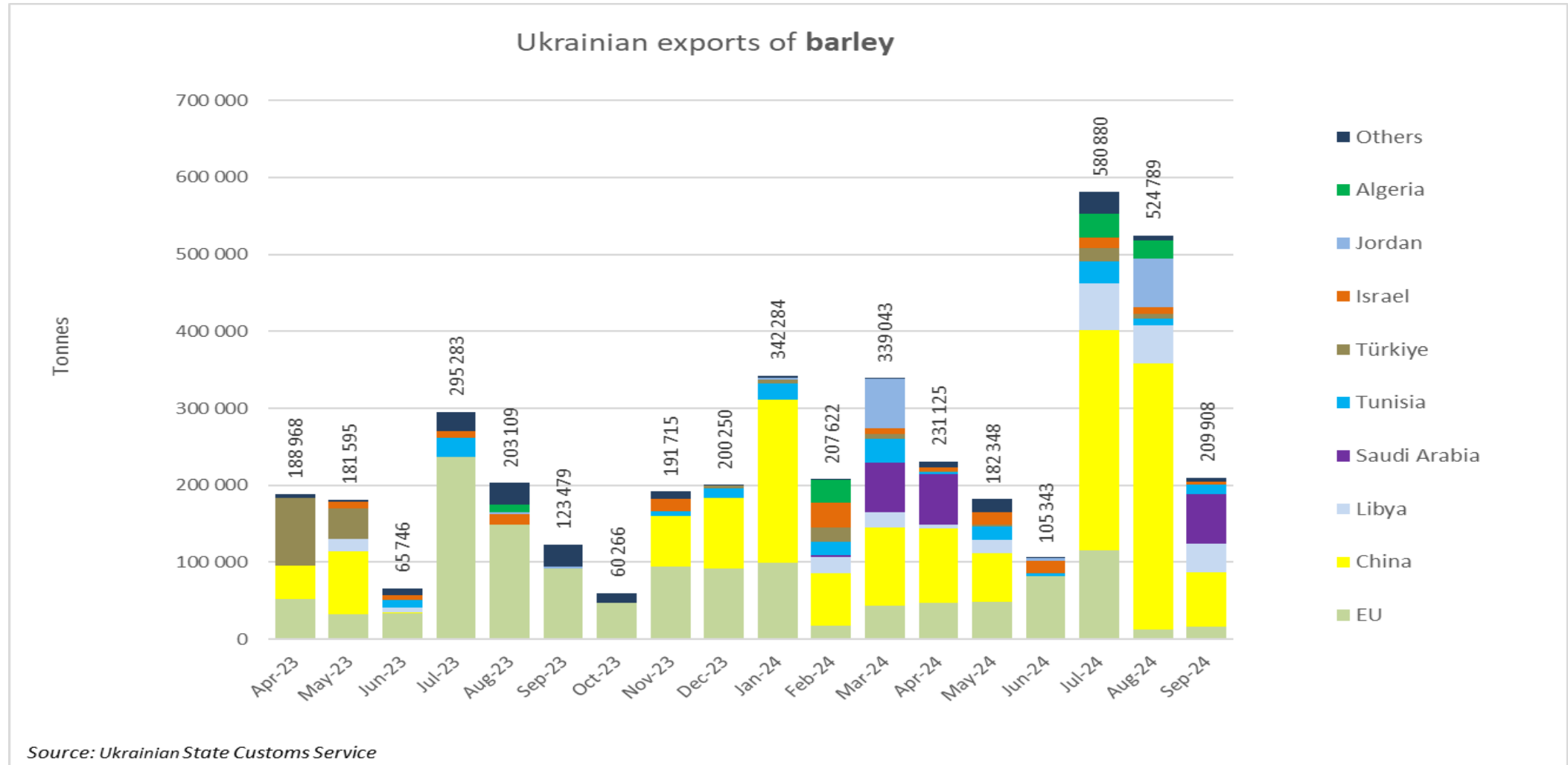


UA maize exports



Source: Ukrainian State Customs Service

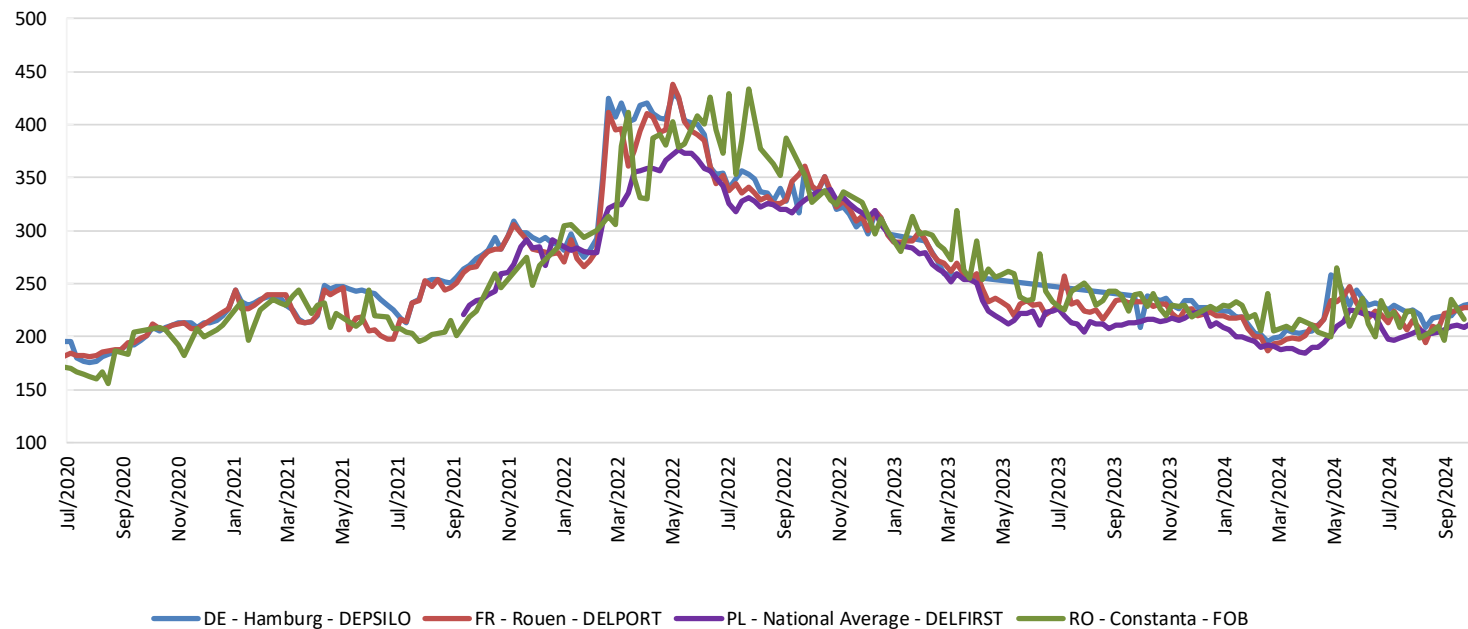
UA barley exports



EU cereals market prices

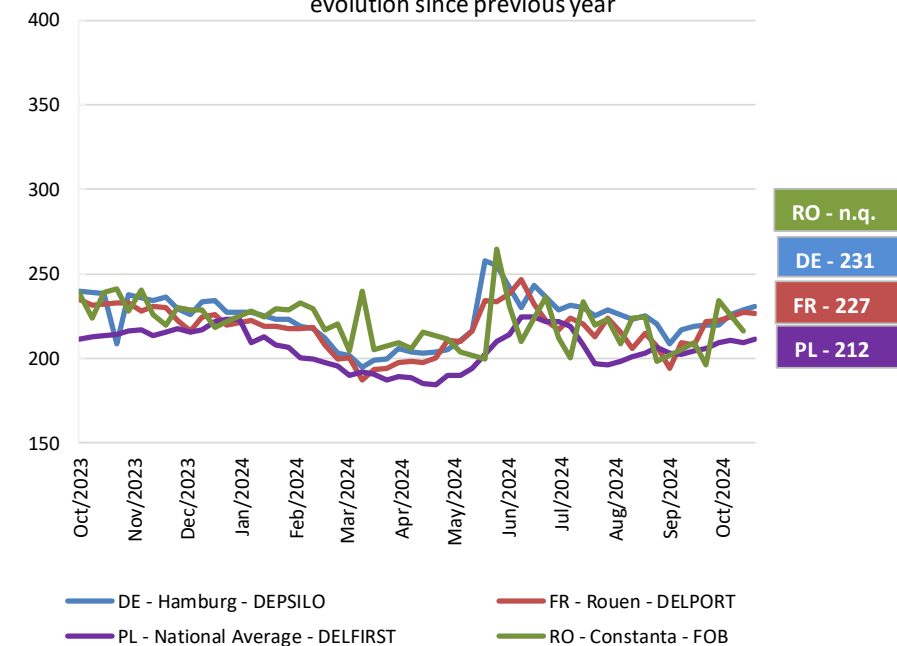
EU market prices for milling wheat – (EUR per tonne)

EU market prices for milling wheat (EUR/tonne)



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



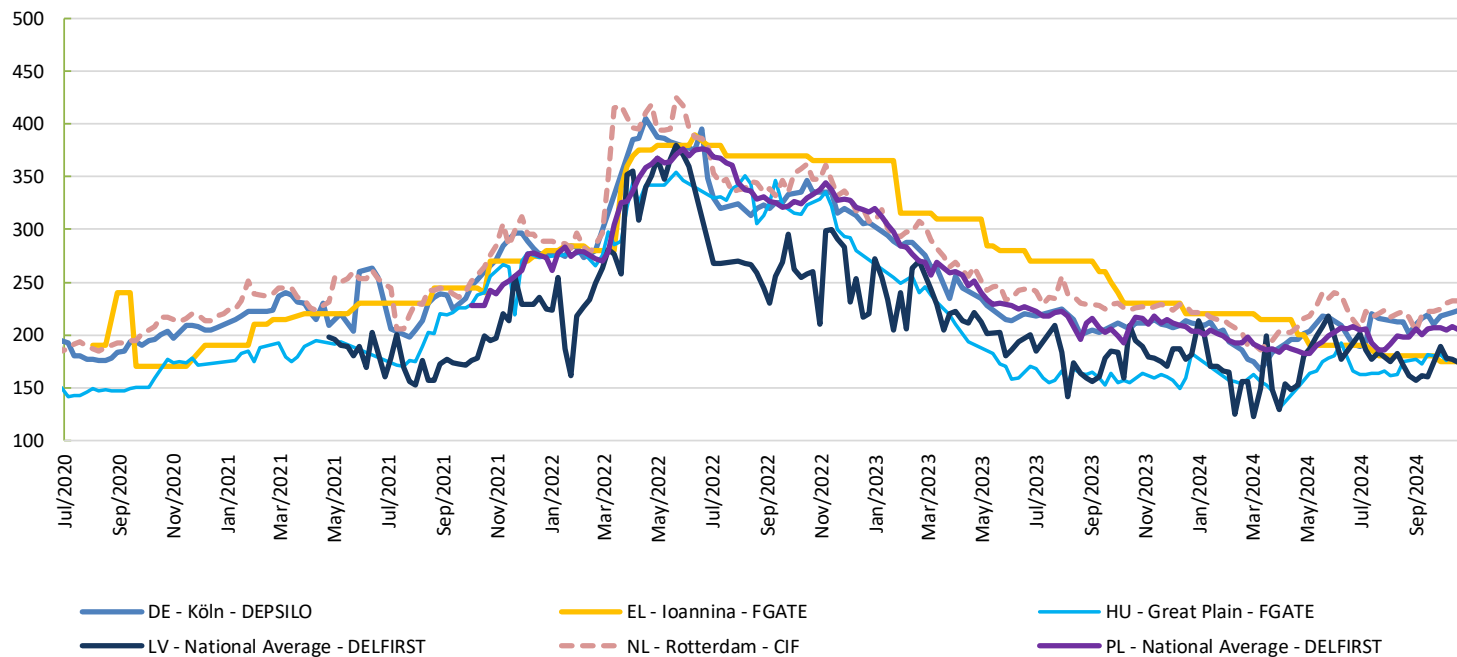
Source: Member States notifications - Commission Implementing Regulation (EU)

France
(DELPORT Rouen)

• EUR 227 per tonne; 2.3% month-on-month; -2.6% year-on-year

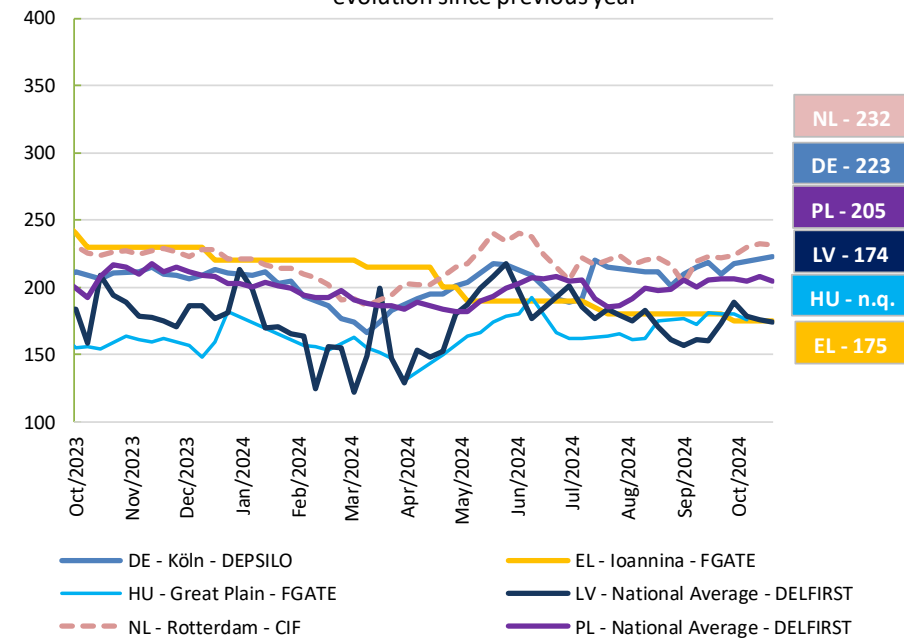
EU market prices for feed wheat – (EUR per tonne)

EU market prices for feed wheat (EUR/tonne)



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

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

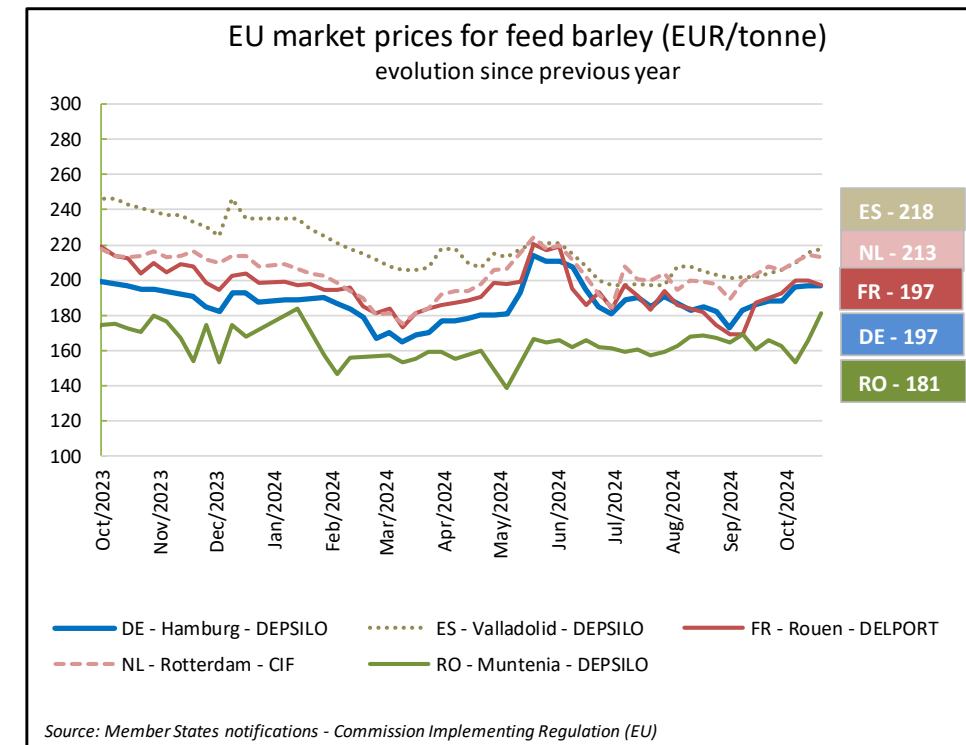
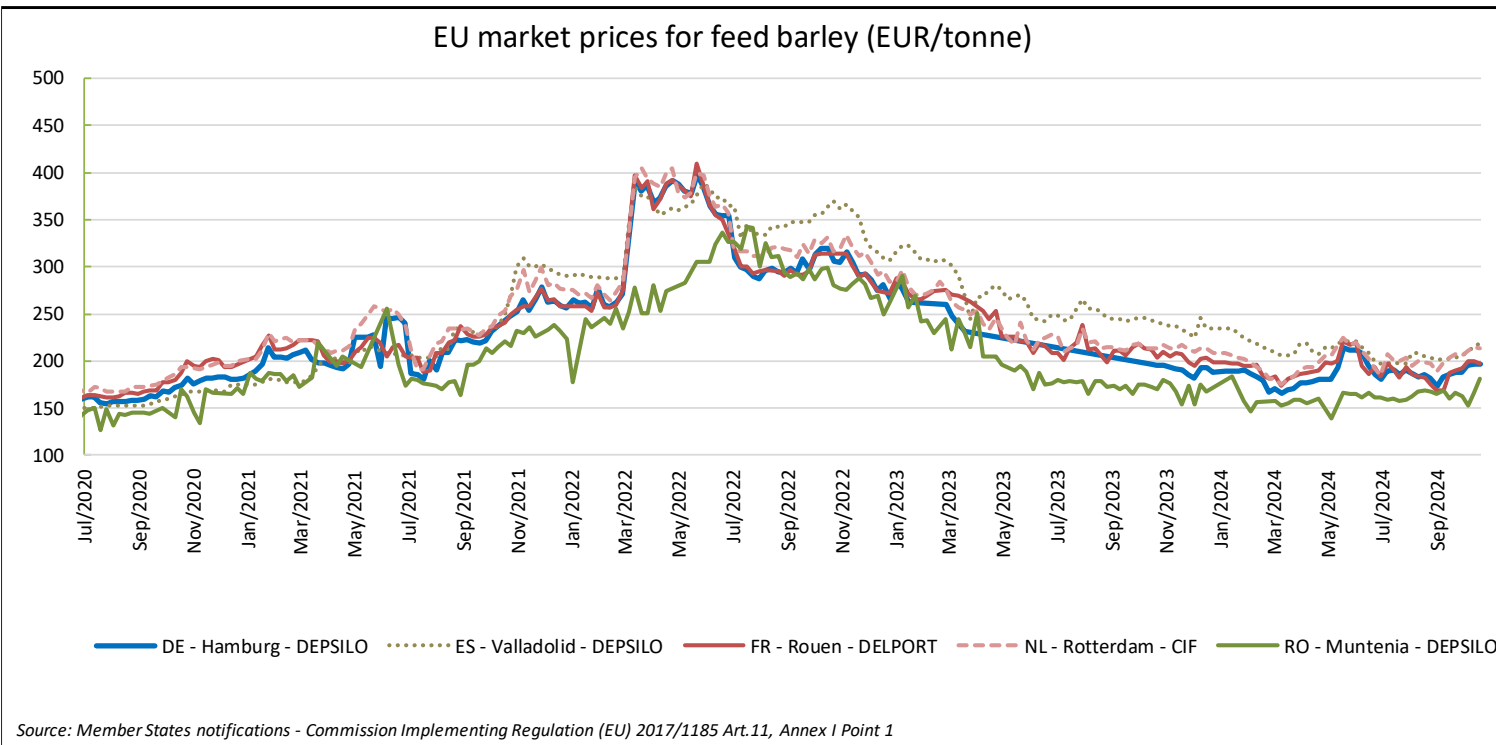


Source: Member States notifications - Commission Implementing Regulation (EU)

Poland
(DELFIRST –
National average)

- EUR 205 per tonne; 2.3% month-on-month; 6.4% year-on-year

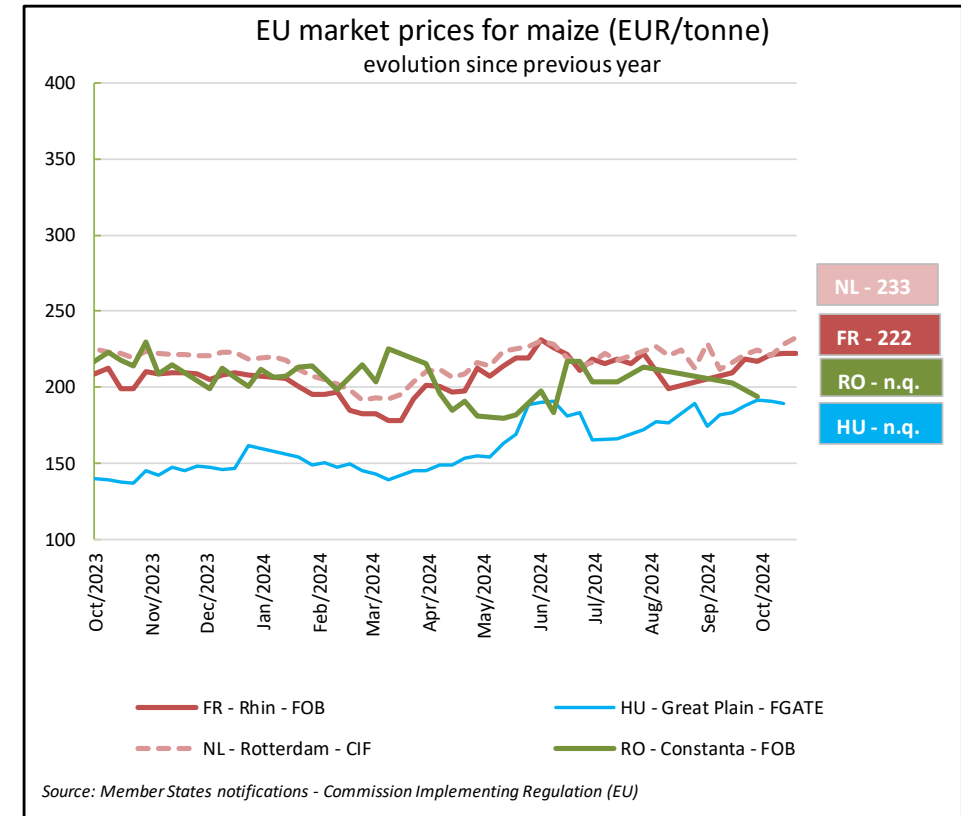
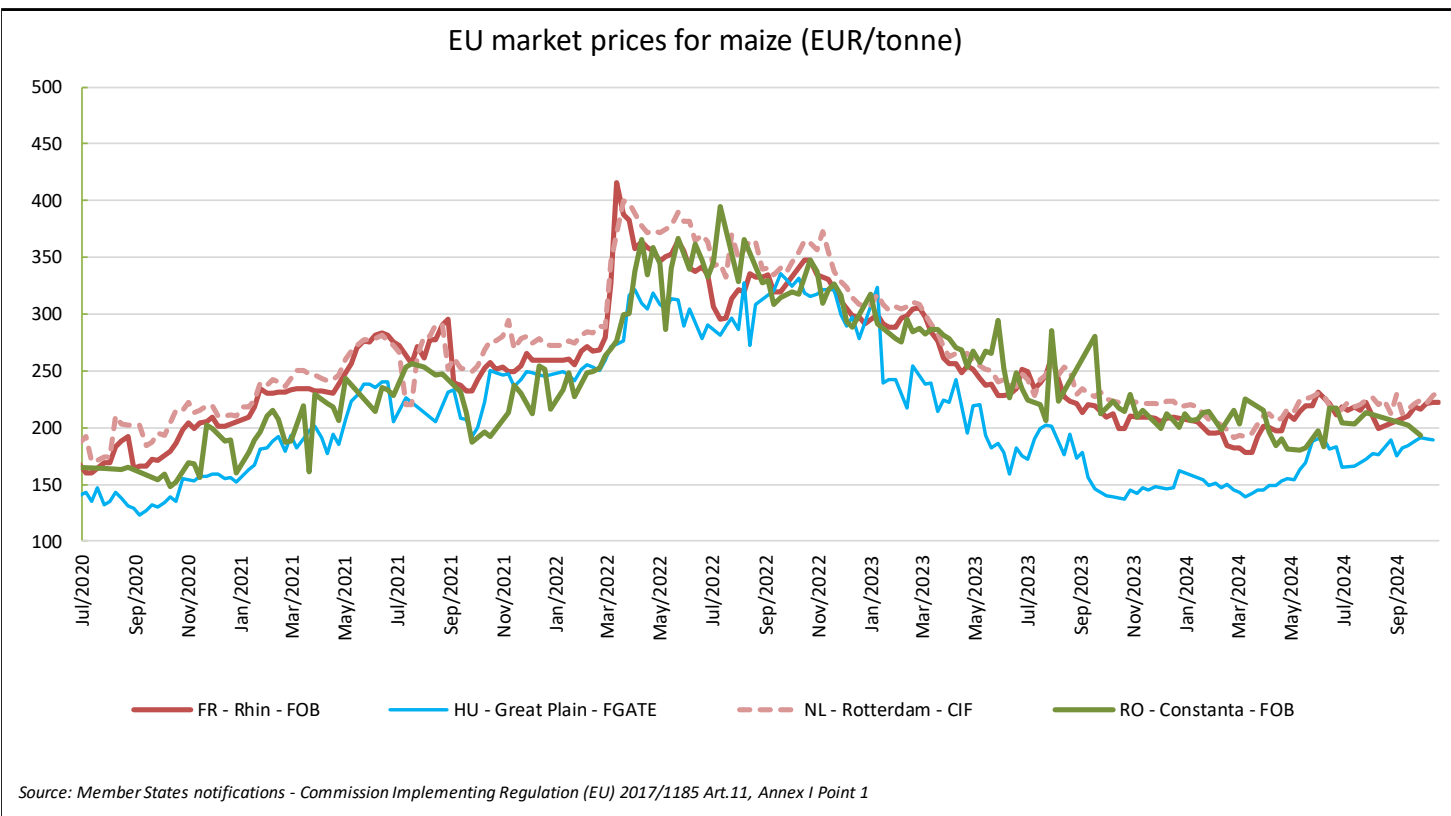
EU market prices for feed barley – (EUR per tonne)



France
(DELPOR Rouen)

• EUR 197 per tonne; 3.8% month-on-month; -3.4% year-on-year

EU market prices for maize – (EUR per tonne)

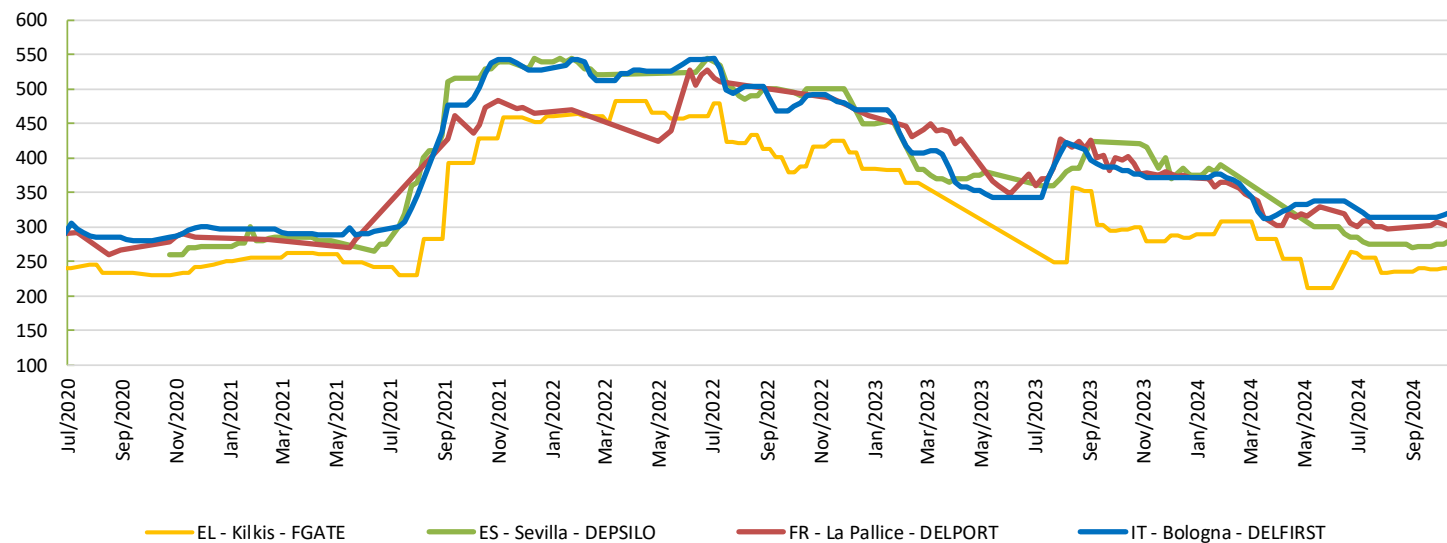


France
(FOB Rhin)

• EUR 222 per tonne; 1.6% month-on-month; 11.8% year-on-year

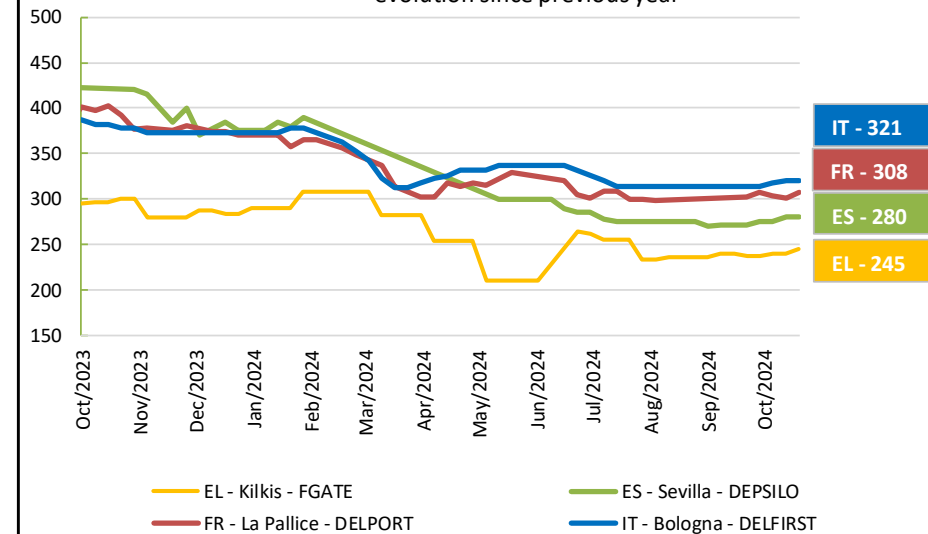
EU market prices for durum wheat – (EUR per tonne)

EU market prices for durum wheat (EUR/tonne)



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

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



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

Italy
(DELFIRST Bologna)

• EUR 321 per tonne; 2.2% month-on-month; -15.1% year-on-year

Last month evolution of EU cereal prices

- Representative EU cereal prices went slightly up this month (1.6% to +3.8%).
- Durum wheat prices remain much below their level one year ago (-15.1%).
- Maize prices, on the other hand, are much higher than a year ago (+11.8%).
- The other cereal prices are in a range between -3.4% for feed barley and +6.4% for feed wheat compared to last year.

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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