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**COEST 622**  
**AGRI 378**

**COVER NOTE**

|                  |                                                                                                                                                               |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| From:            | Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director                                                                           |
| date of receipt: | 4 June 2025                                                                                                                                                   |
| To:              | Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union                                                                                   |
| No. Cion doc.:   | SWD(2025) 246 final                                                                                                                                           |
| Subject:         | COMMISSION STAFF WORKING DOCUMENT Bi-monthly report to the Member States Impact of the trade liberalisation measures for Ukraine on the EU market - July 2025 |

Delegations will find attached document SWD(2025) 246 final.

Encl.: SWD(2025) 246 final



Brussels, 7.8.2025  
SWD(2025) 246 final

**COMMISSION STAFF WORKING DOCUMENT**

**Bi-monthly report to the Member States**

**Impact of the trade liberalisation measures  
for Ukraine on the EU market - July 2025**

## ***Introduction***

In June 2022 the EU granted Ukraine duty free and quota free access to the Union market for one year with the first Regulation on temporary trade-liberalisation measures applicable to Ukrainian products (“the ATM Regulation”) <sup>(1)</sup>, in order to support Ukraine’s economy in the face of Russia’s unprovoked and unjustified war of aggression. These measures supplement the trade concessions already applicable to Ukrainian products under the Association Agreement. They were prolonged with the second ATM Regulation <sup>(2)</sup> and the third ATM Regulation <sup>(3)</sup>, which entered into force on 6 June 2024 and expired on 5 June 2025.

Thanks to the combined effect of these measures (which include a reinforced safeguard mechanism and an emergency brake), and efforts to increase capacity of the Solidarity Lanes and reopening the Black Sea corridor, Ukraine’s imports and exports continue to flow. At the same time, it is necessary to be mindful of the consequences this may have for certain sectors in the European Union.

Therefore, the Commission committed under Article 4(2) of the third ATM Regulation to continue the regular monitoring of EU imports from Ukraine, subject to the trade liberalisation measures, and to present the results of this monitoring every two months. In particular, it is necessary to take into account information on exports, imports, prices on the Union market and Union production of the products subject to the ATM Regulation.

As regards products subject to automatic safeguards under the current ATM Regulation, i.e. eggs, poultry, sugar, oats, maize, groats and honey, the Commission follows the development of imports on a daily basis, and publishes it on the following website, available to the public: [Tariff quota consultation \(europa.eu\)](https://europa.eu/tariff-quota-consultation).

Furthermore, in a statement on the occasion of the adoption of Regulation (EU) 2024/1392 <sup>(4)</sup>, the Commission committed to pay particular attention to the monitoring of imports of grain from Ukraine, in particular wheat, and notably on the concentration of such imports in Member States neighbouring Ukraine.

This will be the last bimonthly monitoring report, following the expiration of the third ATM Regulation on 5 June 2025.

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<sup>(1)</sup> Regulation (EU) 2022/870 of the European Parliament and of the Council of 30.5.2022, OJ L 152, 3.6.2022, p. 103.

<sup>(2)</sup> Regulation (EU) 2023/1077 of the European Parliament and of the Council of 31.5.2023, OJ L 144, 5.6.2023, p.1.

<sup>(3)</sup> Regulation (EU) 2024/1392 of the European Parliament and the Council of 14.5.2024, OJ L 29.5.2024, p.1.

<sup>(4)</sup> Statement by the Commission on the monitoring of imports of grain from Ukraine on the occasion of the adoption of Regulation (EU) 2024/1392 of the European Parliament and of the Council on temporary trade-liberalisation measures supplementing trade concessions applicable to Ukrainian products under the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part OJ C/2024/3357, 29.5.2024.

## ***The Report***

### ***Part A***

The table on page 4 gives an overview of imports from Ukraine from March 2024 to May 2025 of all the products covered by the ATM Regulation. A more detailed analysis for most important products is also provided in the report.

As regards imports, the data analysed are import volumes from Ukraine and total EU import volumes from January 2021 until May 2025. The analysis of the situation on the Union market takes into account the EU production and EU price levels. Data is provided on a monthly basis, where available. It should be noted that for some products not all the data is readily available (sometimes not provided by the Member States), or delays may occur in the data collection, which may result in incomplete data for the most recent periods. For other products, due to their nature and harvesting patterns, production figures are only available on a yearly basis. The import and export data are based on Eurostat figures.

The monitoring is based on the ATM Regulation and consequently on the tariff rate quotas (TRQs) established in the Association Agreement. The product categories, CN codes and TARIC codes covered match the established TRQs. Therefore, data in this report may differ from other publications such as the Animal Newsletter or the Sugar Balance, also issued by the Commission services but which may cover different tariff lines and reporting periods.

Exports and production in the graphs are expressed yearly and for the current year the yearly area chart represents only the sum of the months available to the date of creation of this report.

### ***Part B***

The second part of the report is provided in accordance with the statement mentioned above on the occasion of the adoption of Regulation (EU) 2024/1392. The product scope of this part is wider than the monitoring provided for under Article 4(2) of the ATM Regulation to the extent that it also covers grain products not covered by the ATM Regulation (since already fully liberalised under the Deep and Comprehensive Free Trade Area (DCFTA), or for which the most favoured nation duty is at zero), notably oil seeds such as rapeseed and sunflower seed.

### ***Automatic safeguard implementation***

Regarding the products covered in Part A, the trigger level for the automatic safeguard for eggs <sup>(5)</sup> and sugar <sup>(6)</sup> was reached in June 2024 and the DCFTA TRQs were re-introduced on 2 July 2024, and the trigger level for honey was reached in August 2024, with the DCFTA TRQ re-introduced on 21 August 2024 <sup>(7)</sup>. As for products covered in Part B, the trigger level

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<sup>(5)</sup> <http://data.europa.eu/eli/reg/2024/1827/oj>

<sup>(6)</sup> <http://data.europa.eu/eli/reg/2024/1825/oj>

<sup>(7)</sup> <http://data.europa.eu/eli/reg/2024/2166/oj>

for oats was reached in June 2024 and the DCFTA TRQ was re-introduced on 19 June 2024. <sup>(8)</sup> The trigger level for groats was reached in July 2024 and the DCFTA TRQ was re-introduced on 22 July 2024. <sup>(9)</sup>

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<sup>(8)</sup> <http://data.europa.eu/eli/reg/2024/1726/oj>

<sup>(9)</sup> <http://data.europa.eu/eli/reg/2024/1999/oj>

## Imports in tonnes from Ukraine per TRQ category (order number)

**EU27 monthly imports from Ukraine of agricultural products subject to Tariff Rate Quotas applicable to imports from Ukraine, as from 1 March 2024, in tonnes**

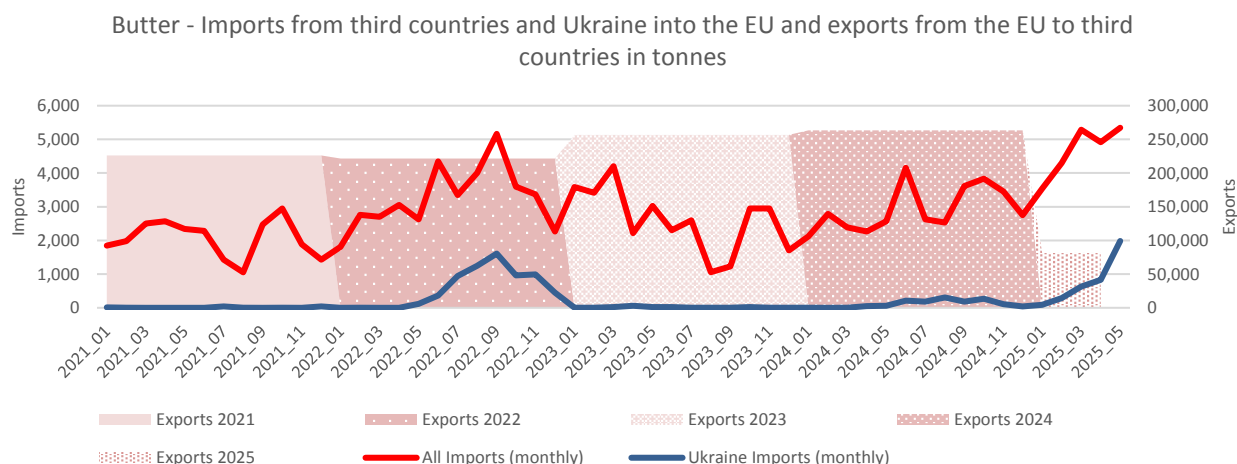
| Description / year_month                | 2024_03   | 2024_04   | 2024_05   | 2024_06   | 2024_07   | 2024_08 | 2024_09 | 2024_10 | 2024_11   | 2025_12   | 2024_01   | 2025_02   | 2025_03   | 2025_04 | 2025_05 | Order no. |
|-----------------------------------------|-----------|-----------|-----------|-----------|-----------|---------|---------|---------|-----------|-----------|-----------|-----------|-----------|---------|---------|-----------|
| Beef Meat                               | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.4270   |
| Pork Meat (TRQ 1)                       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.4271   |
| Pork Meat (TRQ 2)                       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.4272   |
| Poultry meat (TRQ 1)                    | 12,534    | 15,250    | 12,567    | 10,848    | 10,148    | 9,870   | 9,661   | 9,676   | 10,044    | 6,990     | 9,857     | 13,196    | 13,286    | 12,810  | 9,175   | 09.4273   |
| Poultry meat (TRQ 2)                    | 1,167     | 1,410     | 954       | 482       | 219       | 262     | 246     | 140     | 107       | 89        | 187       | 197       | 164       | 164     | 164     | 09.4274   |
| Eggs and albumins (TRQ 1 + TRQ 2)       | 4,821     | 4,444     | 6,042     | 4,694     | 5,783     | 3,707   | 4,946   | 6,324   | 6,061     | 6,132     | 7,633     | 7,607     | 8,378     | 7,029   | 8,305   | 09.4275   |
| Common wheat, flour and pellets         | 612,044   | 538,126   | 626,146   | 322,970   | 361,430   | 338,377 | 773,443 | 722,027 | 361,927   | 364,877   | 466,615   | 324,756   | 394,995   | 159,849 | 124,487 | 09.4306   |
| Barley, flour and pellets               | 24,460    | 18,429    | 35,774    | 80,693    | 133,372   | 22,103  | 18,220  | 113,528 | 60,158    | 27,180    | 13,870    | 15,955    | 8,859     | 18,717  | 2,257   | 09.4307   |
| Maize, flour and pellets                | 1,045,531 | 1,201,572 | 1,264,997 | 1,463,882 | 1,663,284 | 668,831 | 341,675 | 870,944 | 1,072,558 | 1,030,648 | 1,349,081 | 1,189,213 | 1,076,272 | 638,618 | 541,521 | 09.4308   |
| Milk, cream, condensed milk and yogurts | 152       | 269       | 331       | 131       | 226       | 165     | 341     | 386     | 557       | 355       | 311       | 461       | 529       | 583     | 554     | 09.4600   |
| Milk powder                             | 1,098     | 1,430     | 1,919     | 2,730     | 1,966     | 1,320   | 1,000   | 1,081   | 879       | 789       | 1,210     | 1,215     | 2,007     | 2,240   | 2,657   | 09.4601   |
| Butter and diary spreads                | 0         | 51        | 63        | 209       | 187       | 312     | 187     | 274     | 108       | 43        | 88        | 288       | 634       | 833     | 1,984   | 09.4602   |
| Sheep meat                              | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 442       | 0         | 0         | 0         | 0       | 0       | 09.6700   |
| Honey                                   | 5,448     | 5,643     | 9,407     | 6,840     | 6,160     | 2,429   | 1,200   | 1,533   | 1,507     | 502       | 19,079    | 1,501     | 1,658     | 1,992   | 2,339   | 09.6701   |
| Garlic                                  | 0         | 0         | 0         | 0         | 3         | 106     | 75      | 82      | 18        | 0         | 0         | 0         | 0         | 0       | 0       | 09.6702   |
| Oats                                    | 618       | 1,010     | 1,791     | 749       | 231       | 69      | 92      | 114     | 442       | 268       | 495       | 1,167     | 1,475     | 790     | 645     | 09.6703   |
| Sugar                                   | 47,854    | 77,841    | 87,502    | 12,219    | 277       | 429     | 222     | 4,494   | 279       | 145       | 1,509     | 3,179     | 26,158    | 24,932  | 32,117  | 09.6704   |
| Glucose and fructose                    | 214       | 400       | 389       | 414       | 257       | 225     | 91      | 177     | 172       | 119       | 202       | 272       | 287       | 238     | 287     | 09.6705   |
| Flavoured sugar syrup                   | 5         | 3         | 3         | 1         | 1         | 0       | 2       | 3       | 1         | 1         | 0         | 1         | 2         | 0       | 2       | 09.6706   |
| Groats, pellets, grains                 | 3,176     | 3,102     | 3,904     | 3,345     | 2,381     | 473     | 786     | 905     | 813       | 811       | 4,709     | 1,886     | 1,214     | 1,516   | 428     | 09.6707   |
| Malt and gluten                         | 464       | 513       | 328       | 416       | 2,058     | 3,323   | 2,155   | 1,790   | 1,385     | 1,364     | 922       | 769       | 1,077     | 899     | 3,138   | 09.6708   |
| Starches                                | 833       | 2,055     | 2,458     | 1,167     | 1,731     | 688     | 1,137   | 2,290   | 1,530     | 918       | 1,403     | 1,306     | 847       | 692     | 847     | 09.6709   |
| Starch processed (PAPS)                 | 375       | 161       | 66        | 44        | 22        | 16      | 1       | 1,167   | 1,011     | 660       | 341       | 1,245     | 1,303     | 751     | 490     | 09.6710   |
| Residues                                | 2,659     | 2,969     | 5,898     | 5,308     | 5,887     | 6,060   | 4,936   | 5,018   | 3,980     | 4,459     | 3,015     | 4,048     | 6,444     | 4,075   | 6,260   | 09.6711   |
| Mushrooms                               | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.6712   |
| Mushrooms                               | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.6713   |
| Preserved tomatoes                      | 1,428     | 1,430     | 1,290     | 2,290     | 2,114     | 1,523   | 1,183   | 1,643   | 2,281     | 1,832     | 1,397     | 1,404     | 1,348     | 1,020   | 827     | 09.6714   |
| Grape and apple juice                   | 4,929     | 6,479     | 4,310     | 1,701     | 1,834     | 4,738   | 14,162  | 15,660  | 7,381     | 4,213     | 2,462     | 2,527     | 2,230     | 3,536   | 2,184   | 09.6715   |
| Fermented milk (PAPS)                   | 0         | 1         | 0         | 0         | 0         | 0       | 0       | 2       | 6         | 0         | 0         | 6         | 5         | 2       | 2       | 09.6716   |
| Processed butter (PAPS)                 | 0         | 2         | 0         | 2         | 0         | 3       | 0       | 2       | 5         | 2         | 0         | 5         | 5         | 3       | 4       | 09.6717   |
| Sweetcorn (PAPS)                        | 11        | 69        | 75        | 46        | 82        | 125     | 226     | 197     | 55        | 269       | 153       | 66        | 73        | 136     | 272     | 09.6718   |
| Sugar processed products (PAPS)         | 88        | 191       | 174       | 303       | 555       | 360     | 519     | 390     | 415       | 532       | 505       | 627       | 762       | 746     | 631     | 09.6719   |
| Cereal processed products (PAPS)        | 24        | 111       | 49        | 177       | 66        | 0       | 68      | 112     | 91        | 45        | 67        | 89        | 3         | 45      | 57      | 09.6720   |
| Milk Cream Processed (PAPS)             | 11        | 22        | 13        | 17        | 0         | 0       | 8       | 6       | 14        | 19        | 15        | 21        | 1         | 10      | 107     | 09.6721   |
| Food preparations (PAPS)                | 13        | 9         | 23        | 11        | 46        | 9       | 47      | 24      | 32        | 30        | 9         | 34        | 17        | 35      | 19      | 09.6722   |
| Ethyl alcohol                           | 4,288     | 10,060    | 7,517     | 7,542     | 4,776     | 4,203   | 9,960   | 9,978   | 4,744     | 13,617    | 9,845     | 6,942     | 10,013    | 5,813   | 19,720  | 09.6723   |
| Cigars, cigarettes (PAPS)               | 0         | 0         | 3         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.6724   |
| Mannitol, sorbitol (PAPS)               | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.6725   |
| Malt-starch processed products (PAPS)   | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 0       | 0         | 0         | 0         | 0         | 0         | 0       | 0       | 09.6726   |

Source: EUROSTAT (2024\_02 to 2025\_04) and DG TAXUD, Surveillance 3 (2025\_05), extracted on 30.06.2025

## PART A

### BUTTER

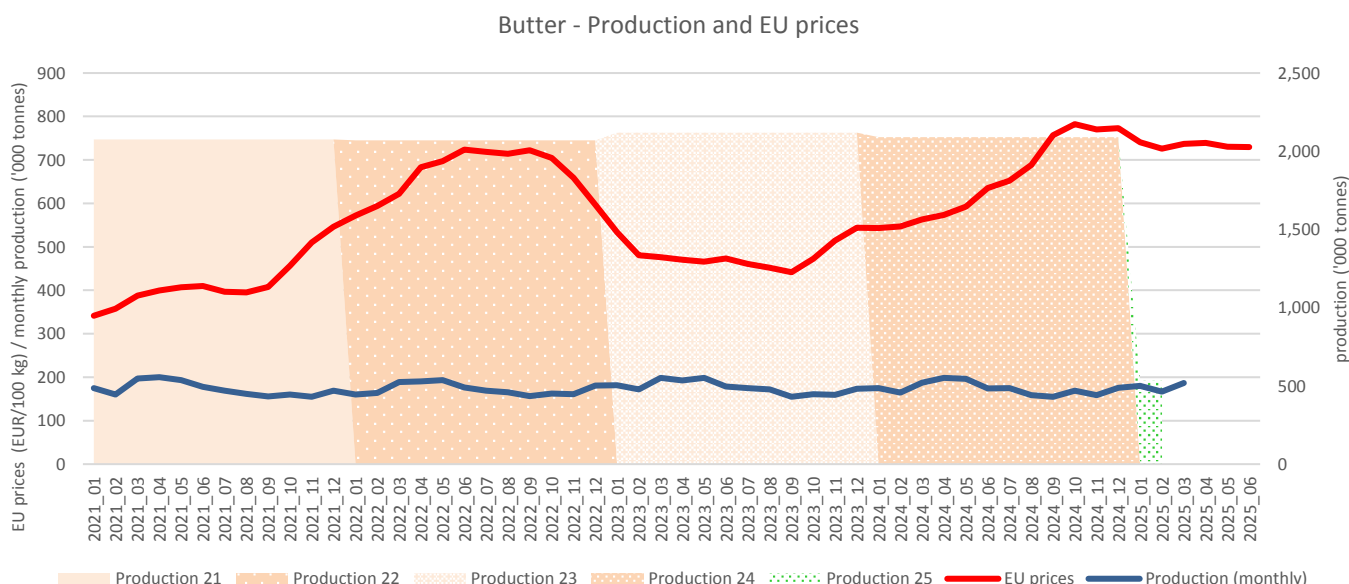
**EU imports** of butter from Ukraine between January 2025 and May 2025 amount to 3 826 tonnes, representing 16.4% of total EU butter imports. **EU exports** of butter between January 2025 and April 2025 decreased by 6% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

**EU butter price** in June 2025 was 15% higher than in June 2024.

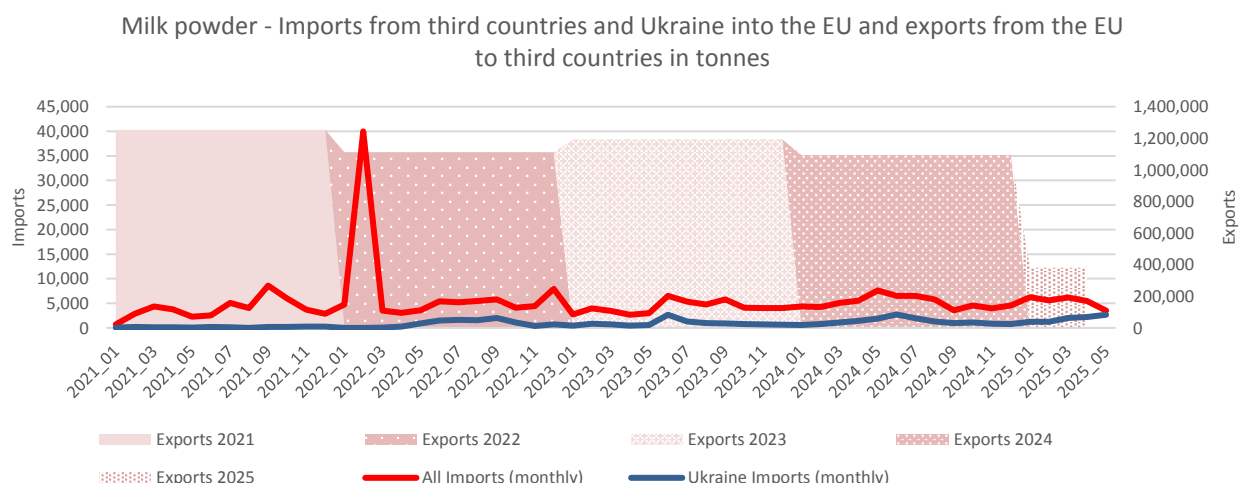
**EU butter production** between January and March 2025 increased by 1% compared to 2024. **Imports of butter from Ukraine** represented 0.19% of **EU butter production** from January 2025 to March 2025.



Source: European Commission

## MILK POWDER

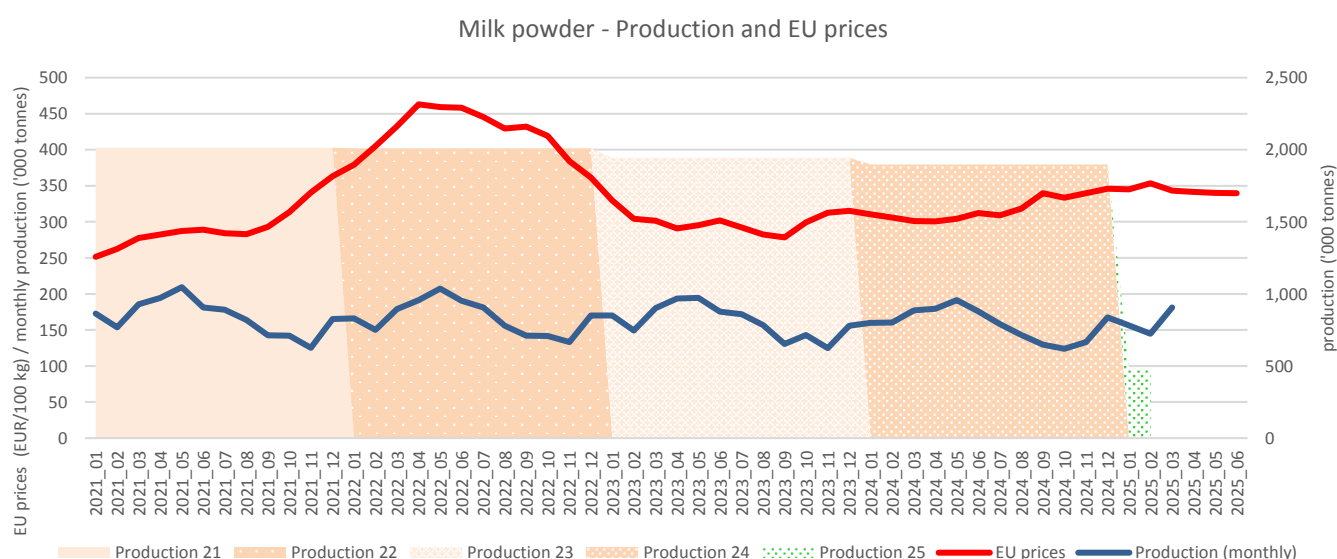
**EU imports** of milk powder from Ukraine between January 2025 and May 2025 were 59.8% higher than in the same period of 2024 and these represented 34.6% of total EU imports. **EU exports** of milk powder between January 2025 and April 2025 decreased by 4% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

**EU milk powder price** in June 2025 was 9% higher than in June 2024.

**EU milk powder production** between January 2025 and March 2025 was 3% lower than in the same period of 2024. **Imports of milk powder from Ukraine** represented 0.9% of **EU milk powder production** from January 2025 to March 2025.



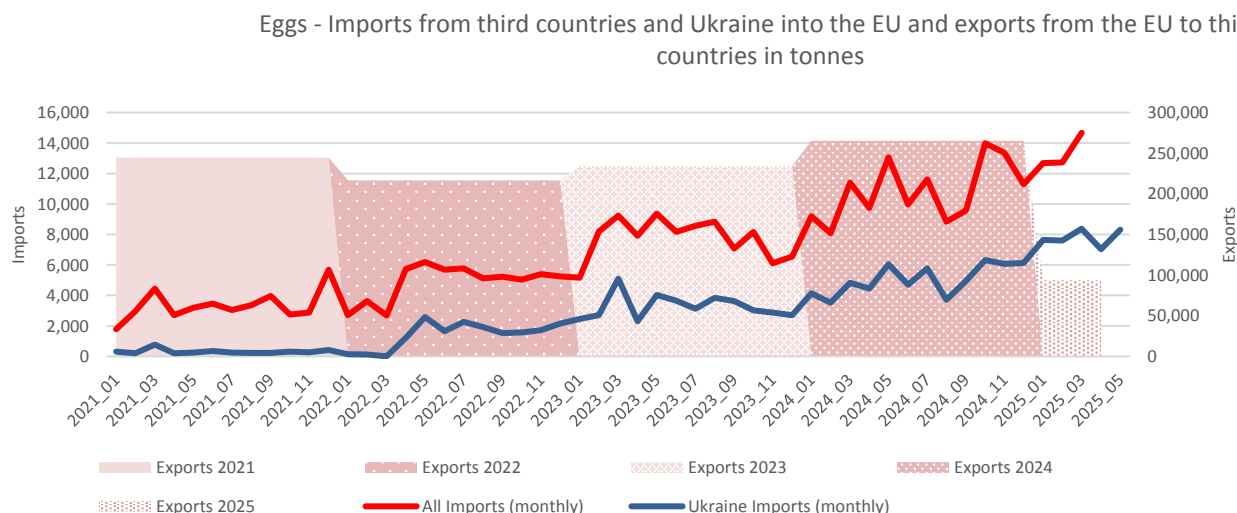
Source: European Commission, based on Whole Milk Powder and Skimmed Milk Powder data



## EGGS

The trigger level for the automatic safeguard was reached in June 2024 and the DCFTA TRQ was re-introduced on 2 July 2024. <sup>(10)</sup>

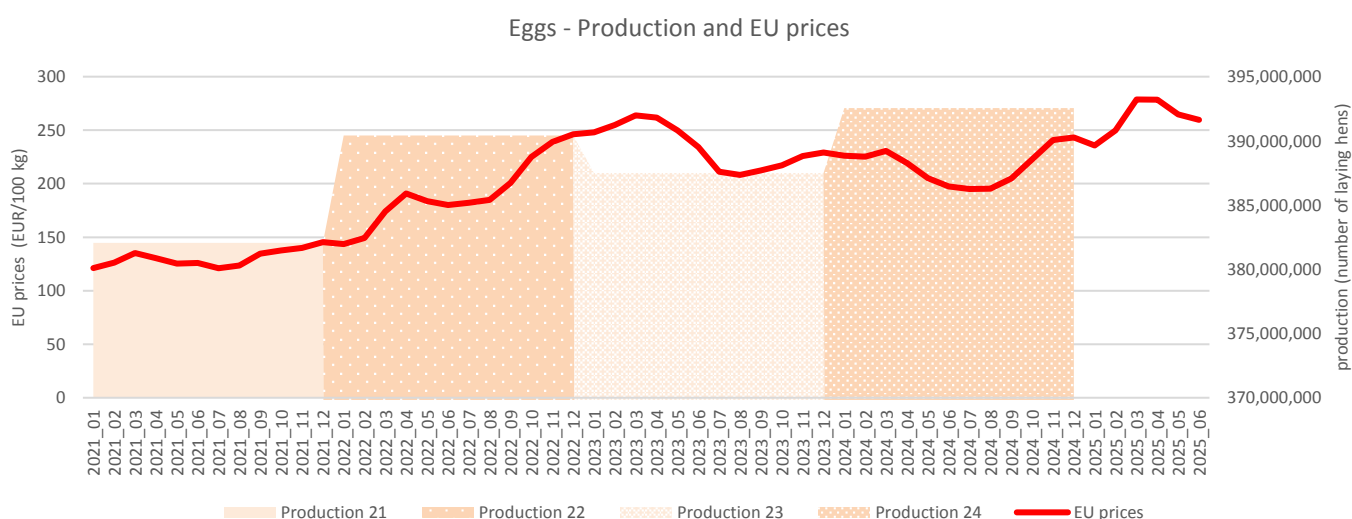
**EU imports** of eggs from Ukraine between January 2025 and May 2025 were 69.6% higher than in the same period of 2024 and these represented 61.8% of total EU imports. **EU exports** between January 2025 and April 2025 increased by 17% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

**EU eggs price** in June 2025 was 31% higher than in June 2024.

**EU eggs production** is not yet part of the regular market monitoring conducted by the Commission. The best data available from the Member States is the number of laying hens per farming method.

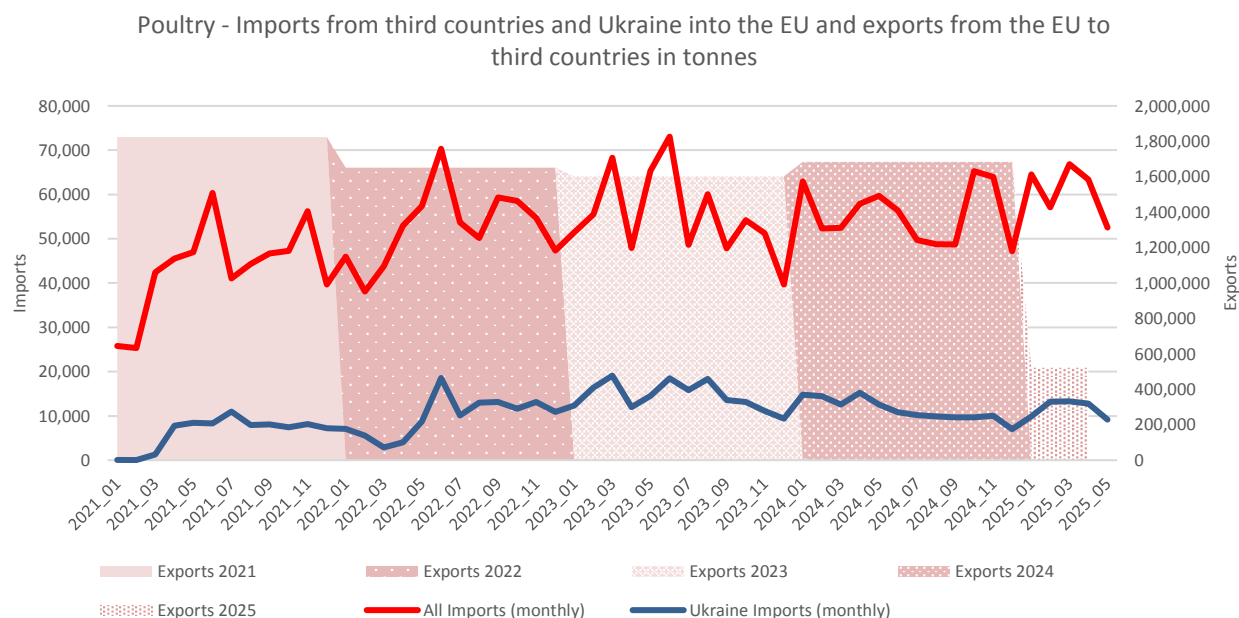


Source: European Commission

<sup>(10)</sup> <https://eur-lex.europa.eu/eli/reg/2024/1827/oj>

## POULTRY

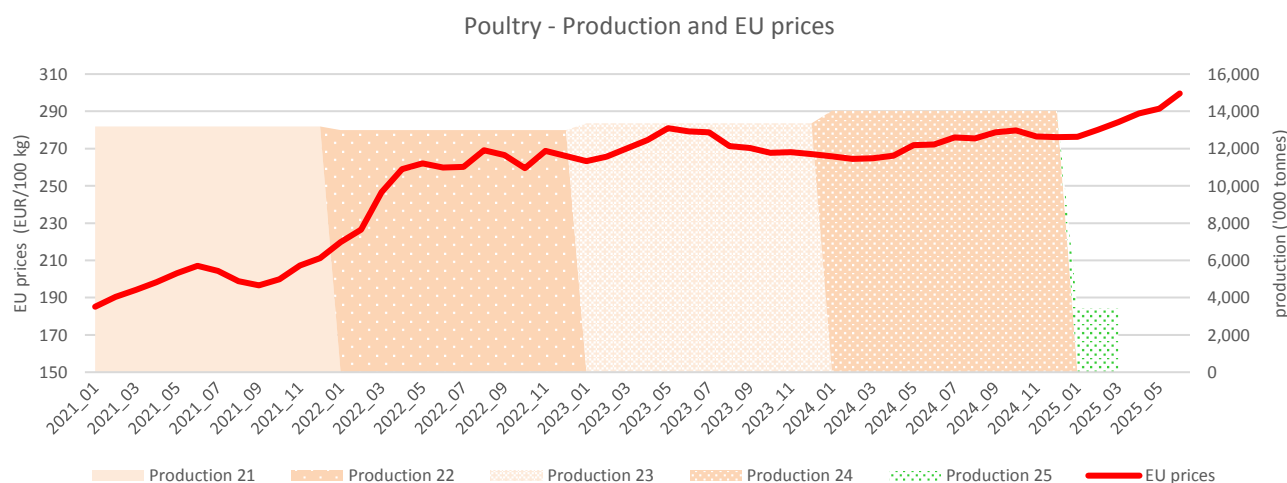
**EU imports** of poultry from Ukraine between January 2025 and May 2025 were 16.2% lower than in the same period of 2024 and these represented 19.2% of total EU imports. **EU exports** of poultry between January 2025 and April 2025 decreased by 5% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

**EU poultry prices** in June 2025 were 10% higher than in June 2024.

**EU poultry production** between January 2025 and March 2025 was 1% higher than in the same period of 2024. It is underlined that EU production data covers the whole broiler carcass (while imports from Ukraine are mainly boneless cuts- breast fillets). This hampers a direct comparability.

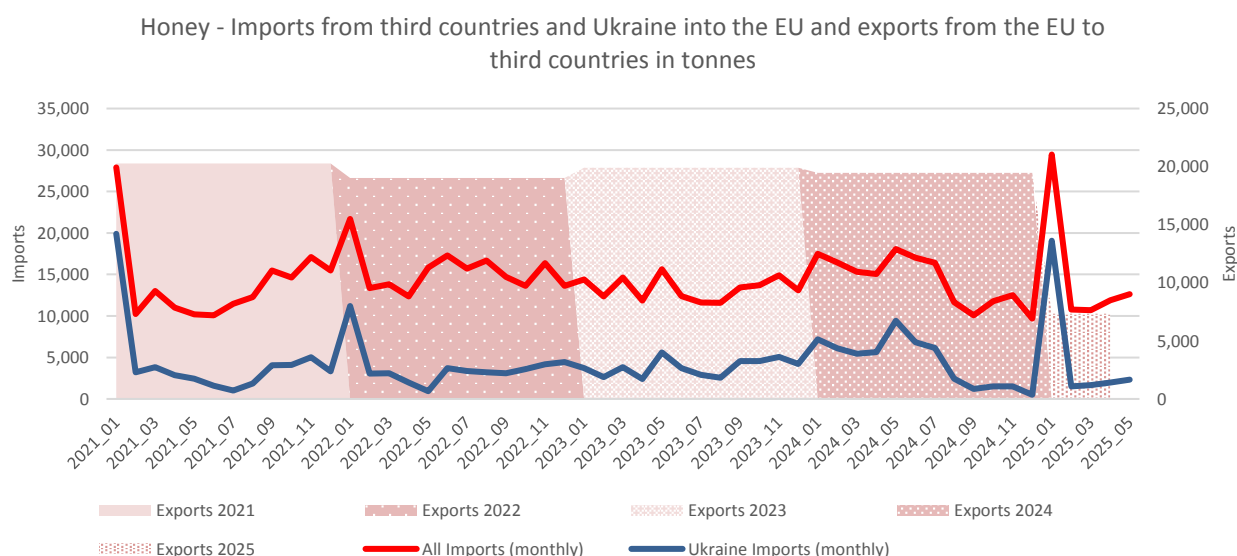


Source: European Commission

## HONEY

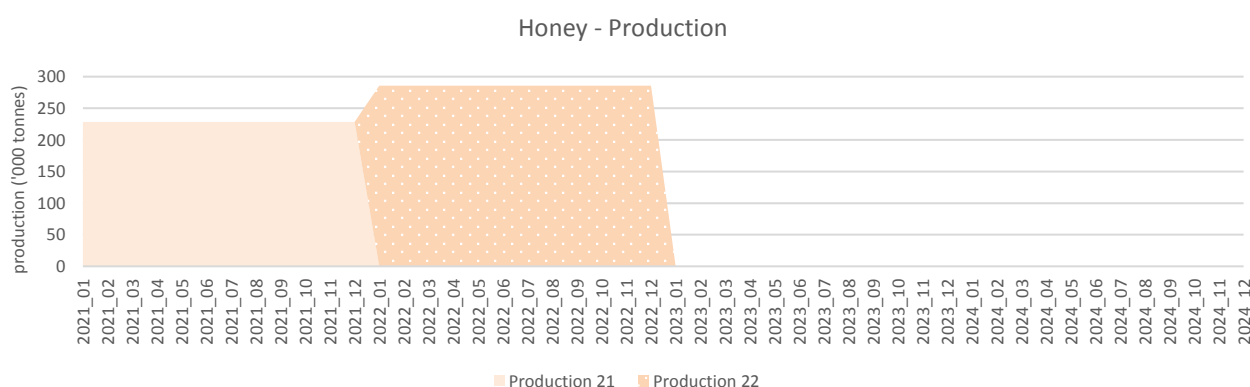
The trigger level for honey was reached in August 2024, and the DCFTA TRQ was re-introduced on 21 August 2024. <sup>(11)</sup>

**EU imports** of honey from Ukraine between January and May 2025 were 21.4% lower than in the same period of 2024 and represented 35.2% of total EU imports. **EU exports** between January 2025 and April 2025 increased by 10% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

Information on **production and prices of honey in the Union** is not part of regular market monitoring. Detailed data per Member State is only available within the framework of the reporting on Member States' CAP strategic plans. The latest available data on production is from 2022 when EU honey production amounted to 285 700 tonnes and is therefore not relevant for evaluating the current market situation. Given this lack of data, it is not possible to evaluate the impact of imports from Ukraine on the Union market.



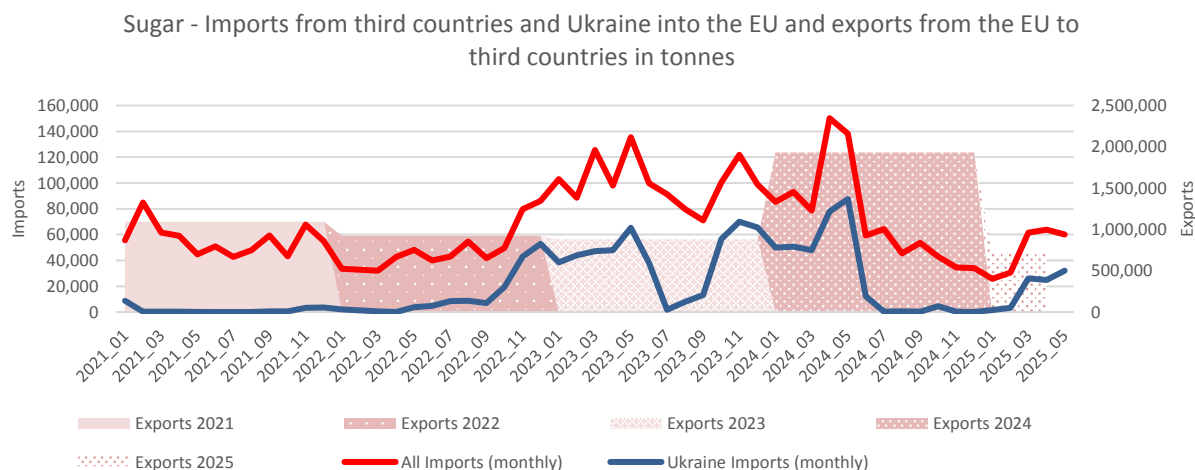
Source: European Commission

<sup>(11)</sup> <http://data.europa.eu/eli/reg/2024/2166/oj>

## SUGAR

The trigger level for the automatic safeguard was reached in June 2024 and the DCFTA TRQ was re-introduced on 2 July 2024. <sup>(12)</sup>

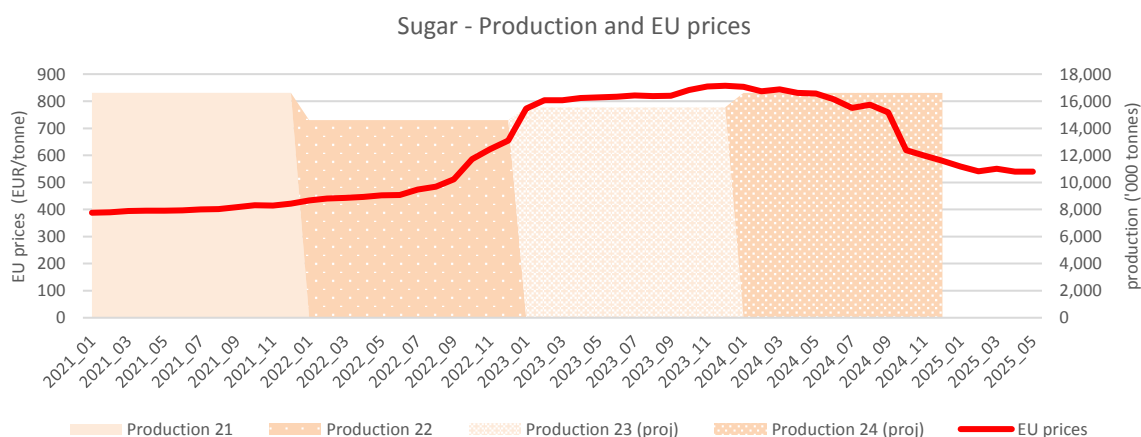
**EU imports** of sugar from Ukraine between January 2025 and May 2025 were 72% lower than in the same period of 2024 and these represented 36.4% of total EU imports. **EU exports** between January 2025 and April 2025 increased by 29% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

**EU sugar price** in May 2025 was 35% lower than in May 2024.

**EU sugar production** projection for the current marketing year 2024/25 (that starts on 1 October) is 6.5% higher than in 2023/24 <sup>(13)</sup>. Sugar imports from Ukraine between October 2024 and May 2025 represent about 0.56% of the projected total EU production of the marketing year 2024/25.



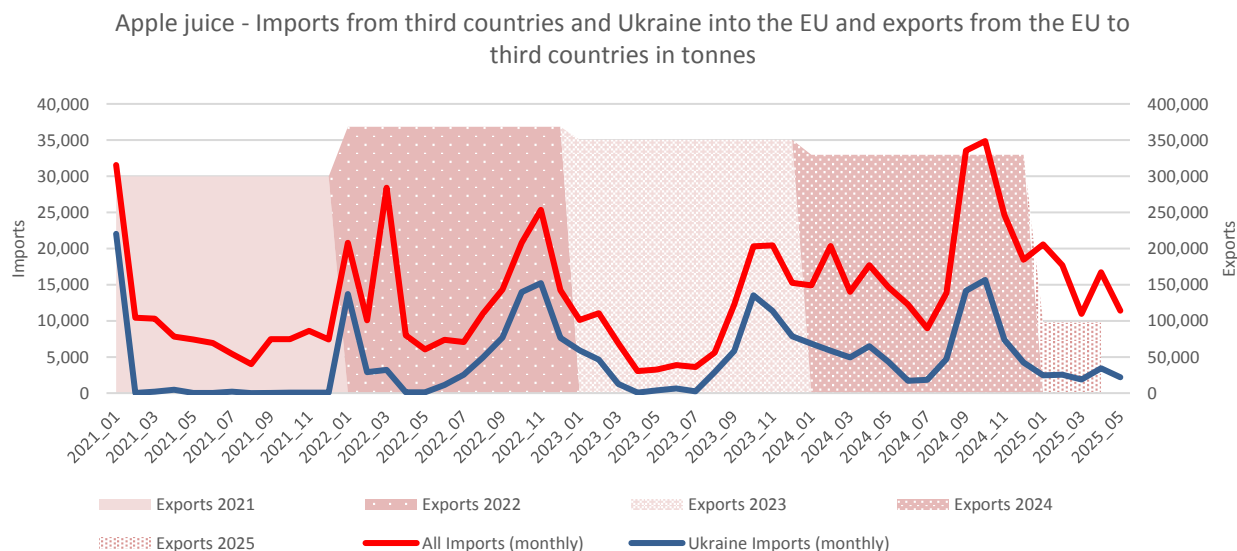
Source: European Commission

<sup>(12)</sup> <http://data.europa.eu/eli/reg/2024/1825/oj>

<sup>(13)</sup> [https://agriculture.ec.europa.eu/data-and-analysis/markets/overviews/market-observatories/sugar\\_en](https://agriculture.ec.europa.eu/data-and-analysis/markets/overviews/market-observatories/sugar_en)

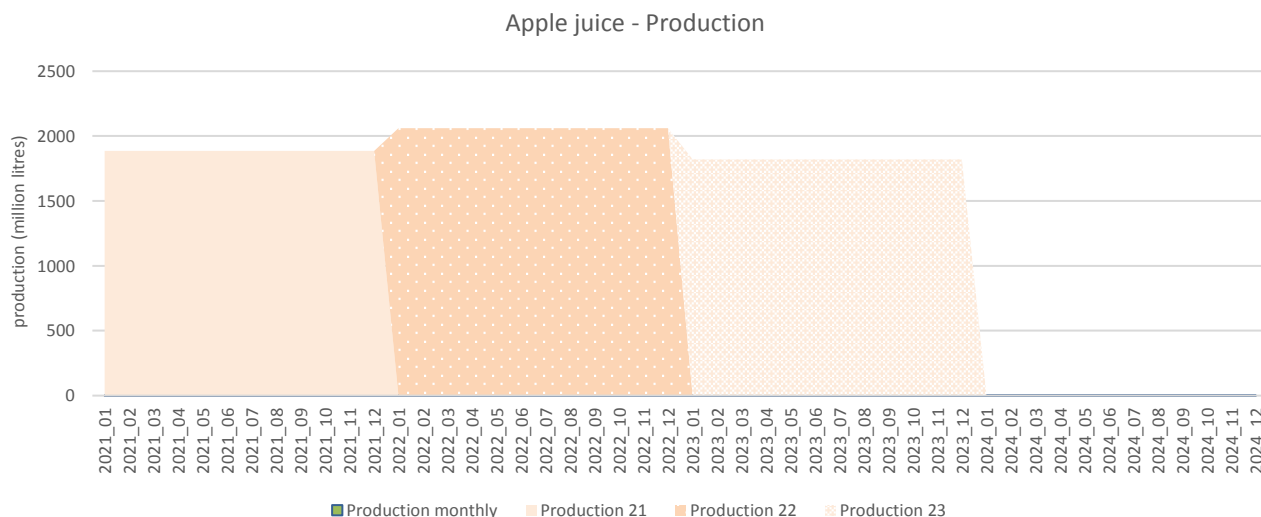
## APPLE JUICE

**EU imports** of apple juice from Ukraine between January 2025 and May 2025 were 55.9% lower than in the same period of 2024 and these represented 16.2% of total EU imports. **EU exports** between January 2025 and April 2025 decreased by 14.5% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

The latest available data on **EU apple juice production** is from 2023 when it was 9.6 % lower than in 2022. As price data is not part of the Commission's regular monitoring, there is a lack of complete data available, and hence it is not possible to evaluate the impact of imports from Ukraine on the Union market.



Source: European Commission

## PART B

### DATA ON EU CEREALS AND OILSEEDS MARKETS IN THE CONTEXT OF MONITORING OF IMPORTS FROM UKRAINE

This document is provided on a regular basis to the Member States in relation to the statement <sup>(14)</sup> by the Commission on the monitoring of imports of grain from Ukraine provided on the occasion of the adoption of Regulation (EU) 2024/1392 of the European Parliament and of the Council of 14 May 2024 on temporary trade-liberalisation measures supplementing trade concessions applicable to Ukrainian products under the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part<sup>15</sup>:

*‘Given the importance of grain production and grain markets, the Commission will pay particular attention to the **monitoring of imports of grain, in particular wheat, and notably to the concentration of such imports in Member States neighbouring Ukraine.**’*

#### General trends in a nutshell

Boosted by strong increase for maize, the International Grains Council (IGC) forecasts **total world grains production** to expand for the third year in a row and reach a record of 2 377.2 million tonnes in **2025/26** (+2.8% y/y). Consumption is also projected at a new peak of 2 372.9 million tonnes (+1.6% y/y), including gains for feeding, as well as for food and industrial uses.

Including a record harvest in India and strong rebounds in the EU and Argentina, **world wheat production** is forecast at a new peak of 807.9 million tonnes (+1.1% y/y) in 2025/26. Led by growth in food use, global wheat consumption is forecast at an all-time high of 813.9 million tonnes (+1.5% y/y), while ending stocks could decrease to a seven-year low of 264.2 million tonnes (-2.2%).

Including prospects for a record US harvest, global **maize** production is projected at a record of 1 275.7 million tonnes (+4.2% y/y). Maize consumption growth is expected to accelerate in 2025/26 and reach a new peak of 1 268.5 million tonnes (+1.9% y/y).

During the second half of marketing year 2024/25 (January-June), grains shipments were slower from both Ukraine and Russia. According to preliminary estimates, Ukrainian grain exports totalled 40.6 million tonnes (51.1 million tonnes the previous year), incl. wheat at 15.7 million tonnes (vs. 18.5 million tonnes the previous year), maize at 22.0 million tonnes (vs. 29.5 million tonnes the previous year) and barley at 2.3 million tonnes (vs. 2.5 million tonnes the previous year). Thus, the wheat export quota (16.2 million tonnes) was not fully used. Russian wheat shipments reached about 41.0 million tonnes, the second largest on record, even if 2.4 of the 10.6 million tonnes export quota fixed for 15/02-30/06 2025 was not used.

The weakening of the US dollar since early April 2025, reduced the export competitiveness of the EU grain exporters, but the strengthening of the Russian rouble since February 2025 had a similar impact on Russian exports. With slower exports, particularly between April and June, producers will

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<sup>14</sup> <https://eur-lex.europa.eu/eli/C/2024/3357/oj>

<sup>15</sup> [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L\\_202401392](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L_202401392)

enter the next season with larger stocks than expected. In addition, cutting of the new crop started earlier, while export demand remains moderate. Consequently, prices will remain under pressure and farmers with sufficient storage capacity will try to delay selling their crops at the current low prices.

As of 9 July, the IGC wheat sub-index, which indicates global price trends, fell by 3% year-on-year reaching 199 points, while the IGC maize sub-index increased by 13% y/y to 216 points.

On fob basis, Russian **milling wheat export prices** are estimated at USD 228 per tonne (+4% y/y), while FR Rouen quoted at USD 232 per tonne (-3%) and RO Constanta at USD 230 per tonne (-1%). US wheat prices are very competitive, incl. the Soft Red Winter at USD 221 per tonne (-3%) and the Hard Red Winter wheat at USD 233 per tonne (-12%).

**Maize prices** (fob export) are quoted in the range of USD 193 – 206 per tonne for the US and South America, while Ukrainian old crop is more expensive (USD 232) due to limited spot availabilities. New crop Ukrainian prices (October delivery) are more competitive at USD 212 per tonne.

**EU cereals production** in marketing year 2025/26 is projected as of end of June 2025 at 282.9 million tonnes (+10.8% year-on-year and 4.1% above the recent average). Soft wheat production is forecast to rebound to 128.2 million tonnes (+14.8%), while maize is expected to reach 64.6 million tonnes (+8.5%) and barley 53.3 million tonnes (+8.4%).

As for **EU cereals' trade**, preliminary data from Taxud Surveillance database shows that imports for marketing year 2024/25 by 1 June 2025 stand at 28.8 million tonnes (-6% y/y), including 7.2 million tonnes of soft wheat (-18% y/y) and 18.2 million tonnes of maize (+7% y/y). Of these, cereal imports from Ukraine reached 15 million tonnes, of which 10.1 million tonnes of maize and 4.4 million tonnes of soft wheat. Most of the imports from Ukraine were destined to Spain, whereas almost no volumes reached neighbouring Member States from April 2023 onwards. EU cereals exports in the marketing year 2024/25 in turn reached 29.7 million tonnes (-30% compared to the same period of marketing year 2023/24), including 19.1 million tonnes of soft wheat (-34% y/y) and 4.2 million tonnes of barley (-24% y/y). However, cereals exports figures could be significantly underestimated given the persistent problems with availability of customs data from certain Member States, particularly France, a major cereal exporter.

**EU oilseed production** for the marketing year 2025/26 is estimated as of end of June 2025 at 31.3 million tonnes (+11.6% year-on-year), reflecting a rebound in yields for all oilseeds. **Rapeseed** production is estimated at 18.9 million tonnes. **Sunflower seed** output forecast is pegged at 9.5 million tonnes, anticipating a significant recovery in key producing Member States.

Preliminary data from Taxud Surveillance database shows that for EU oilseeds and oilseeds' co-products imports for marketing year 2024/25 by 1 June 2025 stand at 45.2 million tonnes (+7% y/y), out of which 12.9 million of soya beans (+7% y/y), and 17.7 million tonnes of soya meal (+26% y/y). The increase in imports of soya beans, rapeseed, and soya bean meal is largely compensating for the decline in rapeseed meal (-60% y/y) and rapeseed oil imports (-41% y/y) from Russia and Belarus. On 1 June, EU oilseed imports from Ukraine, for marketing year 2024/25, reached a total of 8.5 million tonnes, mainly rapeseeds (2.4 million tonnes), sunflower oil (2.0 million tonnes), soya beans (1.5 million tonnes), rapeseed and sunflower seed meals. Oilseeds imports to the Member States neighbouring Ukraine were negligible since April 2023, except for Poland which remained the top EU importer of Ukrainian sunflower and soya bean meals and vegetable oils. EU exports of oilseeds reached 4.0 million tonnes (-7% y/y).

EU oilseed prices followed global trends. EU rapeseed quotations increased marginally year-on-year, while sunflower seed by 30% year-on-year. EU sunflower seed price is at EUR 553 per tonne, likely due to reduced market activity towards end of the season and reduced domestic output. Prices increased on reduced level of the harvest in key producing countries.

The EU cereals and oilseed market situation remains balanced, with prices evolving in line with international trends.

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### 1. EU cereals production evolution

- Total EU production

| EU-27: usable production by selected crops (thousand tonnes) |         |         |         |         |         |         |         | 5-Year TrimAvg | 2025p vs 5Y TrimAvg |
|--------------------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|----------------|---------------------|
| Crop                                                         | 2019    | 2020    | 2021    | 2022e   | 2023e   | 2024f   | 2025p   |                |                     |
| Soft wheat                                                   | 131 126 | 118 099 | 129 009 | 125 814 | 125 185 | 111 678 | 126 565 | 123 033        | ↓ 2.9%              |
| Durum wheat                                                  | 7 397   | 7 345   | 8 079   | 7 464   | 7 413   | 7 213   | 7 986   | 7 407          | ↑ 7.8%              |
| Maize                                                        | 70 120  | 67 433  | 73 193  | 53 116  | 61 225  | 59 583  | 63 782  | 62 747         | ↓ 1.6%              |
| Barley                                                       | 55 042  | 53 937  | 51 443  | 51 418  | 47 047  | 49 135  | 52 334  | 50 665         | ↓ 3.3%              |
| Triticale                                                    | 10 979  | 12 100  | 11 442  | 11 139  | 10 750  | 9 923   | 10 834  | 11 110         | ↓ -2.5%             |
| Oat                                                          | 6 869   | 8 401   | 7 399   | 7 360   | 5 831   | 7 674   | 7 464   | 7 478          | ↓ -0.2%             |
| Rye                                                          | 8 269   | 8 740   | 7 773   | 7 285   | 7 385   | 6 924   | 7 172   | 7 481          | ↓ -4.1%             |
| Sorghum                                                      | 965     | 978     | 774     | 504     | 787     | 989     | 779     | 846            | ↓ -7.9%             |
| Other cereals                                                | 3 865   | 3 481   | 3 655   | 2 610   | 2 218   | 2 101   | 2 705   | 2 770          | ↓ -2.4%             |
| Total cereals                                                | 294 632 | 280 514 | 292 767 | 266 708 | 267 841 | 255 220 | 279 620 | 271 688        | ↓ 2.9%              |

Source: European Commission, DG AGRI, *update 28 May 2025*



- Production of Member States neighbouring Ukraine

million tonnes

| Update: 28/5/2025 | Soft wheat |         |              | Maize   |         |              | Barley  |         |              | Total cereals |         |              |
|-------------------|------------|---------|--------------|---------|---------|--------------|---------|---------|--------------|---------------|---------|--------------|
|                   | 2025/26    | y/y (%) | y/5-y av (%) | 2025/26 | y/y (%) | y/5-y av (%) | 2025/26 | y/y (%) | y/5-y av (%) | 2025/26       | y/y (%) | y/5-y av (%) |
| Bulgaria          | 6.7        | 0.5     | 4.4          | 2.9     | 81.4    | 10.6         | 0.9     | -15.4   | 29.8         | 10.7          | 11.7    | 11.3         |
| Hungary           | 5.8        | 14.9    | 15.0         | 6.4     | 21.5    | 6.6          | 1.8     | 17.6    | 14.0         | 14.8          | 16.1    | 6.5          |
| Poland            | 12.3       | 0.1     | -2.7         | 8.3     | -11.2   | -0.3         | 3.3     | 10.7    | 12.2         | 34.6          | -0.1    | -1.3         |
| Romania           | 10.0       | 0.2     | 7.1          | 10.1    | 56.6    | 13.0         | 2.4     | -10.8   | 26.1         | 23.0          | 17.0    | 17.1         |
| Slovakia          | 1.9        | 52.1    | 8.7          | 1.3     | 31.5    | 3.7          | 0.6     | 8.9     | -1.7         | 4.3           | 31.8    | 9.0          |
| Total 5 MS        | 36.8       | 4.2     | 4.3          | 28.9    | 22.6    | 6.8          | 9.0     | 2.2     | 16.5         | 87.4          | 9.4     | 6.4          |
| Total EU          | 126.6      | 13.3    | 2.9          | 63.8    | 7.0     | 1.6          | 52.3    | 6.5     | 3.3          | 279.6         | 9.6     | 2.9          |

Source: European Commission, DG AGRI

## 2. EU oilseeds production evolution

| EU-27: production by selected crops (thousand tonnes) |        |        |        |        |        |        |        |                |                     |
|-------------------------------------------------------|--------|--------|--------|--------|--------|--------|--------|----------------|---------------------|
| Crop                                                  | 2019   | 2020   | 2021   | 2022   | 2023e  | 2024f  | 2025p  | 5-Year TrimAvg | 2025p vs 5Y TrimAvg |
| Rapeseed                                              | 15 380 | 16 687 | 17 072 | 19 561 | 19 737 | 16 688 | 18 849 | 17 774         | ↑ 6.1%              |
| Sunflower seed                                        | 10 244 | 9 001  | 10 365 | 9 302  | 9 799  | 8 286  | 9 666  | 9 367          | ↔ 3.2%              |
| Soybean                                               | 2 742  | 2 617  | 2 649  | 2 448  | 2 792  | 2 982  | 2 876  | 2 686          | ↑ 7.1%              |
| Linseed                                               | 73     | 85     | 106    | 84     | 82     | 65     | 69     | 84             | ↓ -17.3%            |
| Field peas                                            | 2 012  | 1 920  | 1 837  | 1 866  | 1 907  | 2 083  | 1 890  | 1 898          | ↔ -0.4%             |
| Broad/field beans                                     | 1 033  | 1 254  | 1 126  | 1 292  | 1 163  | 1 393  | 1 260  | 1 236          | ↔ 1.9%              |
| Lupins                                                | 215    | 342    | 321    | 452    | 365    | 482    | 391    | 386            | ↔ 1.2%              |
| Total oilseeds                                        | 28 439 | 28 390 | 30 192 | 31 395 | 32 410 | 28 022 | 31 460 | 29 992         | ↔ 4.9%              |
| Total protein crops                                   | 3 260  | 3 516  | 3 285  | 3 610  | 3 435  | 3 958  | 3 541  | 3 520          | ↔ 0.6%              |

Source: European Commission, DG AGRI, update 28 May 2025

- Production of Member States neighbouring Ukraine

million tonnes

| Update: 28/5/2025 | Rapeseed |         |              | Sunflower seed |         |              | Soybean |         |              | Total oilseeds |         |              |
|-------------------|----------|---------|--------------|----------------|---------|--------------|---------|---------|--------------|----------------|---------|--------------|
|                   | 2025/26  | y/y (%) | y/5-y av (%) | 2025/26        | y/y (%) | y/5-y av (%) | 2025/26 | y/y (%) | y/5-y av (%) | 2025/26        | y/y (%) | y/5-y av (%) |
| Bulgaria          | 0.3      | 64.8    | 0.5          | 1.9            | 16.3    | 2.6          | 0.0     | 601.2   | -13.0        | 2.1            | 20.8    | 1.0          |
| Hungary           | 0.4      | -12.9   | -37.4        | 1.8            | -1.0    | 1.8          | 0.2     | -36.8   | -4.5         | 2.3            | -6.8    | -11.4        |
| Poland            | 3.3      | 1.1     | -1.9         | 0.0            | 2.9     | -3.1         | 0.0     | -53.1   | 1.9          | 3.4            | -0.1    | -2.2         |
| Romania           | 2.0      | 69.9    | 57.3         | 2.2            | 49.5    | 7.1          | 0.3     | 1.8     | -2.2         | 4.5            | 52.7    | 23.8         |
| Slovakia          | 0.4      | -3.2    | -13.2        | 0.2            | 8.7     | 4.6          | 0.1     | -1.3    | 8.2          | 0.7            | 0.0     | -4.2         |
| Total 5 MS        | 6.3      | 16.3    | 6.2          | 6.1            | 19.5    | 3.9          | 0.6     | -16.5   | -0.5         | 13.1           | 15.5    | 3.8          |
| Total EU          | 18.8     | 12.9    | 6.1          | 9.7            | 16.7    | 3.2          | 2.9     | -3.6    | 7.1          | 31.5           | 12.3    | 4.9          |

Source: European Commission, DG AGRI

### 3. EU cereal trade (data from TAXUD surveillance)<sup>16</sup> (1/7/2024-1/6/2025) (all origins)

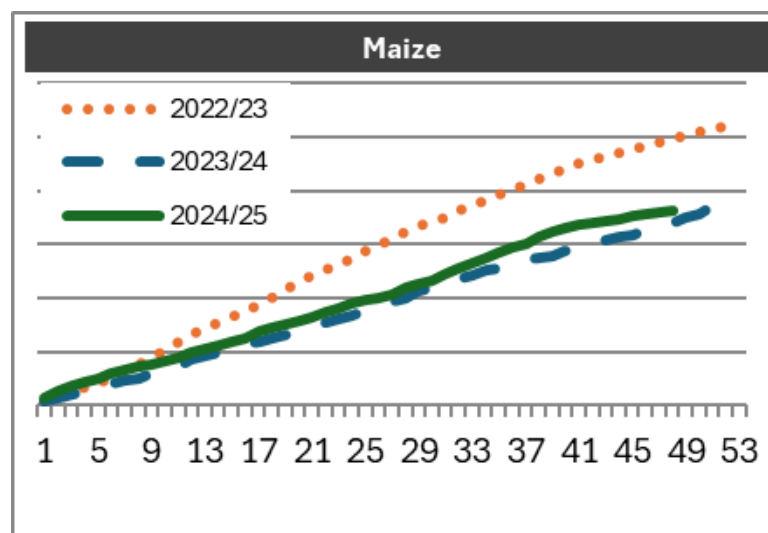
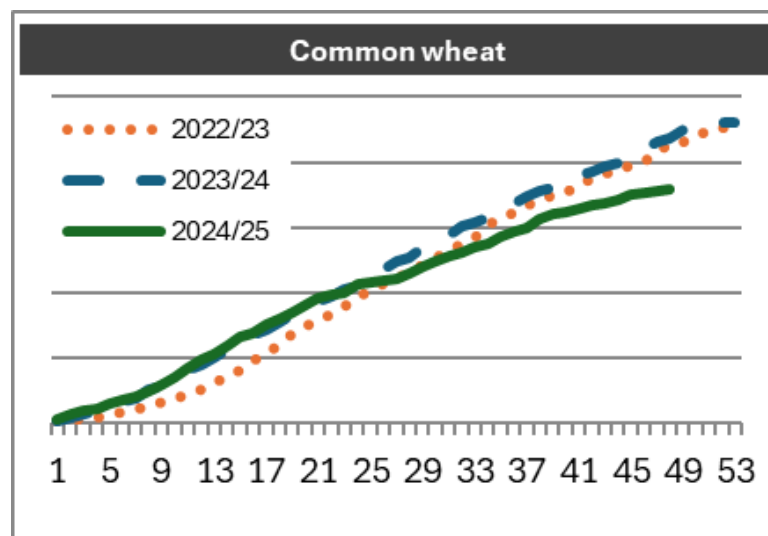
| Customs Surveillance<br>(tonnes)      | EU<br>01/07/2024 - 01/06/2025 |                  |                   |                  | EU<br>01/07/2023 - 02/06/2024 |                   | EU<br>01/07/2022 - 04/06/2023 |                   |
|---------------------------------------|-------------------------------|------------------|-------------------|------------------|-------------------------------|-------------------|-------------------------------|-------------------|
|                                       | Export                        | Y/Y<br>variation | Import            | Y/Y<br>variation | Export                        | Import            | Export                        | Import            |
|                                       |                               |                  |                   |                  |                               |                   |                               |                   |
| Common wheat                          | 19 126 728                    | ↓ -34%           | 7 151 750         | ↓ -18%           | 28 763 972                    | 8 739 287         | 29 601 182                    | 8 546 432         |
| Common wheat flour (grain equivalent) | 458 577                       | ↑ +1%            | 278 525           | ↑ +2%            | 454 241                       | 273 785           | 438 991                       | 282 613           |
| Durum wheat                           | 539 727                       | ↓ -28%           | 1 913 778         | ↓ -20%           | 748 656                       | 2 388 698         | 660 925                       | 1 756 011         |
| Durum wheat meal (grain equivalent)   | 230 696                       | ↑ +22%           | 3 763             | ↑ +17%           | 188 462                       | 3 230             | 159 294                       | 3 302             |
| <b>Total Wheat</b>                    | <b>20 355 728</b>             | <b>↓ -32%</b>    | <b>9 347 815</b>  | <b>↓ -18%</b>    | <b>30 155 332</b>             | <b>11 405 000</b> | <b>30 860 393</b>             | <b>10 588 359</b> |
| Barley                                | 4 227 975                     | ↓ -24%           | 1 100 162         | ↓ -36%           | 5 599 851                     | 1 716 101         | 6 237 925                     | 1 860 421         |
| Malt (grain equivalent)               | 2 740 237                     | ↓ -4%            | 28 683            | ↓ -16%           | 2 842 698                     | 34 222            | 2 922 664                     | 27 309            |
| Maize                                 | 2 223 221                     | ↓ -41%           | 18 197 852        | ↑ +7%            | 3 755 410                     | 17 000 219        | 3 331 834                     | 24 865 040        |
| Rye                                   | 75 782                        | ↓ -60%           | 7 761             | ↓ -96%           | 188 897                       | 191 091           | 131 954                       | 108 619           |
| Oats                                  | 72 192                        | ↓ -34%           | 58 399            | ↓ -43%           | 109 909                       | 103 221           | 64 915                        | 158 508           |
| Sorghum                               | 12 173                        | ↑ +108%          | 18 006            | ↑ +55%           | 5 851                         | 11 652            | 10 635                        | 33 839            |
| <b>Total Coarse grains</b>            | <b>9 351 580</b>              | <b>↓ -25%</b>    | <b>19 410 863</b> | <b>↑ +2%</b>     | <b>12 502 615</b>             | <b>19 056 505</b> | <b>12 699 926</b>             | <b>27 053 736</b> |
| <b>General Total</b>                  | <b>29 707 308</b>             | <b>↓ -30%</b>    | <b>28 758 678</b> | <b>↓ -6%</b>     | <b>42 657 947</b>             | <b>30 461 505</b> | <b>43 560 319</b>             | <b>37 642 095</b> |

- Data per Member State (1/7/2024-1/6/2025) (all origins):

| Import<br>(tonnes) | Common<br>wheat  | Common<br>wheat flour<br>(grain equivalent) | Durum<br>wheat   | Durum<br>wheat meal<br>(grain equivalent) | Barley           | Malt<br>(grain equivalent) | Maize             | Rye          | Oats          | Sorghum       |
|--------------------|------------------|---------------------------------------------|------------------|-------------------------------------------|------------------|----------------------------|-------------------|--------------|---------------|---------------|
| BE                 | 10 846           | 158                                         | 96 807           | 511                                       | 104 524          | 733                        | 578 422           |              | 11 447        | 487           |
| BG                 |                  | 616                                         | 22               | 6                                         |                  | 4 617                      | 174 645           |              |               | 9             |
| CZ                 | 2 908            | 19 121                                      |                  | 62                                        | 42               | 983                        | 8 352             |              | 102           | 103           |
| DK                 | 2 921            | 202                                         |                  | 2                                         | 6 208            | 205                        | 19 371            |              | 57            | 2             |
| DE                 | 112 663          | 8 682                                       | 133              | 455                                       | 32 387           | 944                        | 395 867           | 94           | 2 647         | 677           |
| EE                 |                  | 26                                          | 139              |                                           |                  | 1 246                      | 3 295             |              |               |               |
| IE                 | 103 745          | 134 447                                     | 5                | 111                                       | 163 542          | 1 704                      | 1 124 027         |              | 4 893         | 28            |
| EL                 | 400 189          | 259                                         | 16 801           | 34                                        | 43 962           | 546                        | 464 588           |              |               | 42            |
| ES                 | 3 623 384        | 2 662                                       | 132 571          | 286                                       | 316 425          | 286                        | 6 788 252         | 7 172        | 35 128        | 1 418         |
| FR                 | 55 471           | 32 698                                      | 220              | 1 381                                     | 11 086           | 5 753                      | 76 299            |              | 191           | 95            |
| HR                 | 14 734           | 26 735                                      | 1                | 38                                        | 8 431            | 147                        | 5 784             |              |               |               |
| IT                 | 1 540 302        | 4 649                                       | 1 583 149        | 257                                       | 25 142           | 914                        | 2 634 799         |              | 1 351         | 11 356        |
| CY                 | 13 463           | 180                                         |                  | 2                                         | 144 803          | 392                        | 237 235           |              | 2             |               |
| LV                 | 45               | 916                                         | 41 183           |                                           |                  | 25                         | 2 417             |              | 253           |               |
| LT                 | 1 082            | 1 257                                       |                  | 11                                        |                  | 424                        | 8 184             |              |               |               |
| LU                 |                  | 25                                          |                  |                                           |                  |                            |                   |              |               |               |
| HU                 |                  | 7 195                                       |                  | 19                                        |                  | 11                         | 92 480            |              | 868           | 3             |
| MT                 | 9 624            | 77                                          |                  | 33                                        | 46               |                            | 690               |              | 2             |               |
| NL                 | 222 809          | 7 545                                       | 1                | 399                                       | 125 152          | 617                        | 3 081 397         | 23           | 725           | 923           |
| AT                 | 1 250            | 350                                         |                  | 11                                        |                  | 6                          | 183 991           |              |               |               |
| PL                 | 67               | 363                                         | 1 473            | 29                                        |                  | 3 071                      | 55 689            |              | 45            | 2 545         |
| PT                 | 268 079          | 11                                          | 36 030           | 11                                        | 29 631           | 282                        | 1 344 199         |              |               | 318           |
| RO                 | 367 518          | 25 863                                      | 856              | 4                                         | 54 360           | 4 169                      | 88 792            | 463          | 161           |               |
| SI                 | 400 601          | 1 237                                       | 4 298            | 1                                         | 23 477           | 426                        | 825 120           |              | 485           |               |
| SK                 | 25               | 3                                           |                  | 8                                         |                  | 2                          |                   |              |               |               |
| FI                 | 43               |                                             |                  |                                           |                  | 84                         | 74                |              |               |               |
| SE                 | 24               | 3 203                                       | 87               | 89                                        | 10 943           | 1 095                      | 3 884             | 8            | 42            |               |
| <b>EU</b>          | <b>7 151 750</b> | <b>278 525</b>                              | <b>1 913 778</b> | <b>3 763</b>                              | <b>1 100 162</b> | <b>28 683</b>              | <b>18 197 852</b> | <b>7 761</b> | <b>58 399</b> | <b>18 006</b> |

<sup>16</sup> Taxud Surveillance database records and centralizes all trade data directly from the national customs authorities; however, for various reasons, regular transmission could be delayed or interrupted and data could be incomplete (in particular for France, Ireland and Bulgaria for the last few months). Based on a comparison with Eurostat/Comext data, soft wheat exports in TAXUD Surveillance database are underestimated by roughly 2.6 million tonnes and barley exports by 0.9 million tonnes for current marketing year.

- Evolution of weekly EU **imports** of main cereals by marketing year:



4. EU oilseeds trade (data from TAXUD surveillance)<sup>17</sup> (1/7/2024-1/6/2025)  
(all origins)

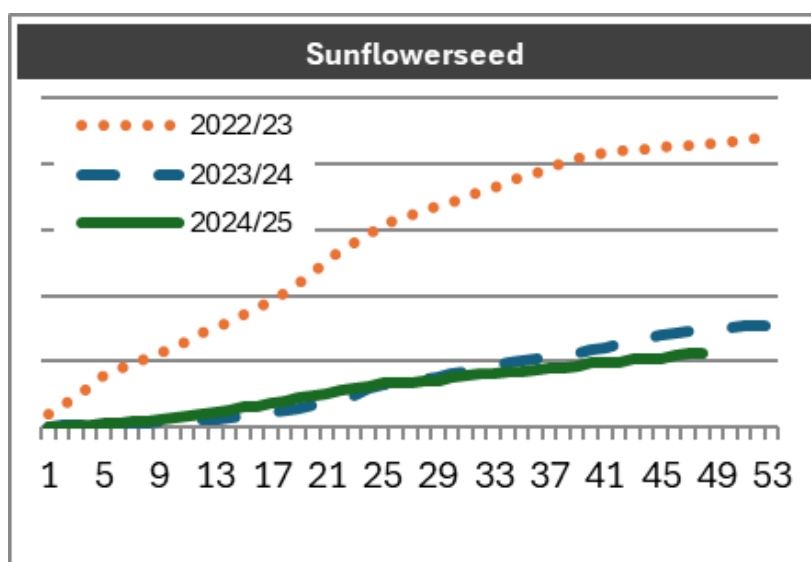
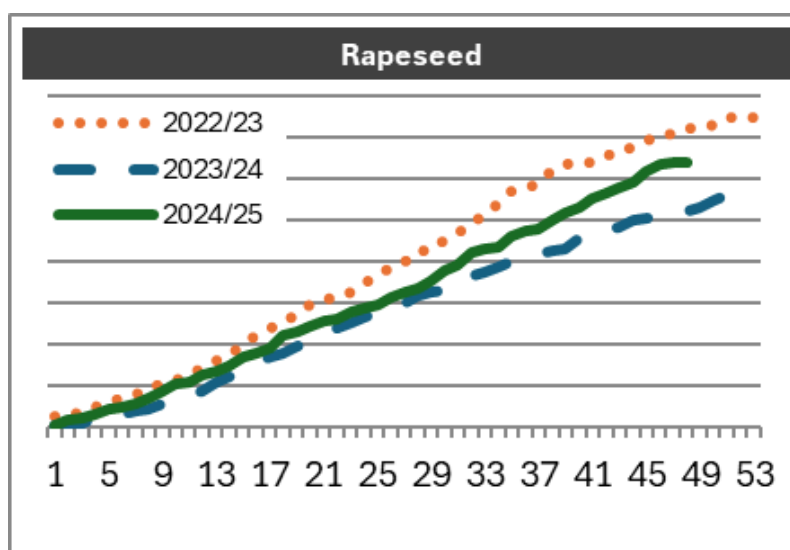
| (tonnes)             | EU                      |               |                   |               | EU                      |                   | EU                      |                   |
|----------------------|-------------------------|---------------|-------------------|---------------|-------------------------|-------------------|-------------------------|-------------------|
|                      | 01/07/2024 - 01/06/2025 |               |                   |               | 01/07/2023 - 02/06/2024 |                   | 01/07/2022 - 04/06/2023 |                   |
|                      | Export                  | Y/Y           | Import            | Y/Y           | Export                  | Import            | Export                  | Import            |
| Soyabeans            | 367 331                 | ↑ +81%        | 12 938 358        | ↑ +7%         | 202 568                 | 12 132 949        | 218 936                 | 12 054 428        |
| Rapeseed             | 318 468                 | ↓ -33%        | 6 396 760         | ↑ +23%        | 472 202                 | 5 192 206         | 525 193                 | 7 197 745         |
| Sunflowerseed        | 521 020                 | ↑ +21%        | 559 417           | ↓ -24%        | 429 410                 | 738 860           | 547 495                 | 2 150 497         |
| <b>Total seeds</b>   | <b>1 206 819</b>        | <b>↑ +9%</b>  | <b>19 894 535</b> | <b>↑ +10%</b> | <b>1 104 180</b>        | <b>18 064 014</b> | <b>1 291 624</b>        | <b>21 402 670</b> |
| Soyameal             | 457 365                 | ↑ +3%         | 17 677 714        | ↑ +26%        | 443 124                 | 14 081 691        | 534 506                 | 14 450 610        |
| Rapeseed meal        | 695 555                 | ↑ +3%         | 309 335           | ↓ -60%        | 676 929                 | 766 911           | 722 425                 | 750 567           |
| Sunflowerseed meal   | 312 089                 | ↓ -39%        | 2 279 975         | ↓ -25%        | 507 730                 | 3 025 417         | 891 512                 | 2 573 272         |
| <b>Total meals</b>   | <b>1 465 009</b>        | <b>↓ -10%</b> | <b>20 267 023</b> | <b>↑ +13%</b> | <b>1 627 783</b>        | <b>17 874 019</b> | <b>2 148 442</b>        | <b>17 774 449</b> |
| Soyaoil              | 705 940                 | ↑ +12%        | 309 703           | ↓ -38%        | 629 272                 | 498 114           | 822 315                 | 470 994           |
| Rapeseed oil         | 491 298                 | ↓ -21%        | 253 632           | ↓ -41%        | 624 311                 | 428 975           | 621 298                 | 361 262           |
| Sunflowerseed oil    | 515 175                 | ↓ -31%        | 2 147 882         | ↓ -19%        | 744 147                 | 2 658 292         | 1 124 266               | 1 710 023         |
| Palm oil             | 380 411                 | ↑ +33%        | 2 630 211         | ↓ -19%        | 286 128                 | 3 242 188         | 150 570                 | 3 916 842         |
| <b>Total oils</b>    | <b>1 386 883</b>        | <b>↓ -16%</b> | <b>5 031 725</b>  | <b>↓ -21%</b> | <b>1 654 586</b>        | <b>6 329 455</b>  | <b>1 896 134</b>        | <b>5 988 127</b>  |
| <b>General Total</b> | <b>4 058 711</b>        | <b>↓ -7%</b>  | <b>45 193 284</b> | <b>↑ +7%</b>  | <b>4 386 549</b>        | <b>42 267 488</b> | <b>5 336 199</b>        | <b>45 165 246</b> |

• Data per Member State (1/7/2024-1/6/2025) (all origins):

| Import (tonnes) | Soyabeans         | Rapeseed         | Sunflower-seed | Soyameal          | Rapeseed meal  | Sunflower-seed meal | Soyaoil        | Rapeseed oil   | Sunflower-seed oil | Palm oil         |
|-----------------|-------------------|------------------|----------------|-------------------|----------------|---------------------|----------------|----------------|--------------------|------------------|
| BE              | 338 447           | 1 846 858        | 2 173          | 474 961           |                | 5 112               | 217            | 78 578         | 14 007             | 76 592           |
| BG              | 29                | 171 059          | 126 608        | 9 940             |                | 23                  | 28 477         | 7 667          | 149 606            | 965              |
| CZ              | 13 288            | 128 787          | 8 125          | 7 386             | 22             | 1 757               | 4 955          | 194            | 10 747             | 56               |
| DK              | 8 252             |                  | 208            | 851 019           |                | 59 187              | 29 214         | 253            | 1 399              | 80 080           |
| DE              | 2 175 461         | 1 232 624        | 25 004         | 1 473 945         | 13 303         | 30 937              | 4 897          | 1 263          | 16 208             | 203 172          |
| EE              |                   | 7 382            | 1 603          | 620               | 5 742          | 12 967              | 323            | 46             | 1 351              | 115              |
| IE              | 8 821             | 137              | 454            | 418 246           | 40             | 6 471               | 27 786         | 4 778          | 2 382              | 50 361           |
| EL              | 231 430           | 190 649          | 12 620         | 526 915           | 2 272          | 20 914              | 15 782         | 4 581          | 25 164             | 115 768          |
| ES              | 3 099 003         | 41 061           | 55 223         | 2 653 916         | 105 962        | 162 490             | 5 268          | 15 386         | 629 439            | 274 879          |
| FR              | 582 245           | 859 832          | 64 909         | 1 891 242         | 41 136         | 448 002             | 865            | 1 595          | 159 266            | 23 504           |
| HR              | 465               | 4 066            | 271            | 1 233             |                | 1 488               | 3 905          | 916            | 17 975             | 7 090            |
| IT              | 1 924 652         | 293              | 2 838          | 1 736 080         | 5 456          | 237 224             | 12 568         | 28 929         | 379 704            | 803 882          |
| CY              |                   |                  | 92             | 126 187           |                | 12 660              | 3 103          | 669            | 7 389              | 105              |
| LV              |                   | 45 433           | 451            | 12 376            | 26 839         | 24 532              | 1 633          | 3 445          | 6 442              | 153              |
| LT              |                   | 230              | 2 810          | 29 261            | 17 458         | 7 584               | 3 295          | 16 998         | 16 087             | 1                |
| LU              |                   |                  |                |                   |                |                     |                |                | 63                 |                  |
| HU              | 69 597            | 11 581           | 1 954          | 212 362           | 41 139         | 141                 | 3 805          | 147            | 368                | 3 043            |
| MT              | 3                 |                  |                |                   | 195            | 140                 | 89             | 10             | 1 712              | 324              |
| NL              | 3 014 018         | 1 669 887        | 19 174         | 2 300 183         | 8 035          | 648 148             | 23 343         | 73 118         | 393 240            | 895 692          |
| AT              | 41 438            | 8 820            | 2 655          | 3 490             |                | 1                   | 72             | 2 215          | 20 901             | 1 245            |
| PL              | 195 149           | 28 581           | 10 286         | 3 272 338         | 30 644         | 479 237             | 89 406         | 2 785          | 29 256             | 3 140            |
| PT              | 889 613           | 74 274           | 43 668         | 149 796           |                |                     |                | 12             | 48 450             | 5 099            |
| RO              | 242 529           | 65 739           | 174 988        | 563 083           | 1 023          | 6 801               | 14 972         | 33             | 58 161             | 10 141           |
| SI              | 101 908           |                  | 232            | 825 439           | 7 822          | 90 947              | 13 346         | 6 445          | 143 723            | 3 336            |
| SK              | 286               | 4                | 609            | 60                |                | 24                  | 1 084          | 3              | 8 263              |                  |
| FI              | 586               |                  | 1 448          | 5 748             |                | 3 464               |                | 25             | 374                | 12               |
| SE              | 1 136             | 9 463            | 1 016          | 131 887           | 2 245          | 19 725              | 21 298         | 3 542          | 6 207              | 71 456           |
| <b>EU</b>       | <b>12 938 358</b> | <b>6 396 760</b> | <b>559 417</b> | <b>17 677 714</b> | <b>309 335</b> | <b>2 279 975</b>    | <b>309 703</b> | <b>253 632</b> | <b>2 147 882</b>   | <b>2 630 211</b> |

<sup>17</sup> Taxud Surveillance database records and centralizes all trade data directly from the national customs authorities, however, for various reasons regular transmission could be delayed or interrupted and data could be incomplete (in particular for France, Ireland, Bulgaria and Poland (vegetable oils only) for the last few months).

- Evolution of weekly EU **imports** of main oilseeds by marketing year:



## 5. Official Ukrainian exports figures and share of the EU among destinations

### • Cereals

Ukrainian exports of the main cereals (maize, wheat and barley) since April 2022 according to the Ukrainian State Customs Services.

| Table 1. Ukrainian cereals exports since April 2022 |                            |               |              |               |            |            |           |                                  |
|-----------------------------------------------------|----------------------------|---------------|--------------|---------------|------------|------------|-----------|----------------------------------|
| Quantity in tonnes                                  | April 2022 - November 2024 | December 2024 | January 2025 | February 2025 | March 2025 | April 2025 | May 2025  | Total 1 April 2022 - 31 May 2025 |
| MAIZE                                               | 69 040 294                 | 2 612 882     | 2 483 558    | 2 173 813     | 2 391 450  | 1 567 578  | 2 021 160 | 82 290 735                       |
| WHEAT                                               | 44 689 371                 | 800 615       | 891 180      | 1 179 185     | 1 129 723  | 771 116    | 959 770   | 50 420 960                       |
| BARLEY                                              | 7 114 362                  | 121 987       | 64 906       | 62 276        | 68 667     | 47 273     | 37 634    | 7 517 105                        |
| TOTAL CEREALS                                       | 120 844 027                | 3 535 484     | 3 439 644    | 3 415 275     | 3 589 839  | 2 385 967  | 3 018 564 | 140 228 800                      |

Source: Ukrainian State Customs Service

EU imports from Ukraine based on the TAXUD surveillance system.

| Table 2. EU cereals imports from Ukraine since April 2022 |                            |               |              |               |            |            |          |                                  |
|-----------------------------------------------------------|----------------------------|---------------|--------------|---------------|------------|------------|----------|----------------------------------|
| Quantity in tonnes                                        | April 2022 - November 2024 | December 2024 | January 2025 | February 2025 | March 2025 | April 2025 | May 2025 | Total 1 April 2022 - 31 May 2025 |
| MAIZE                                                     | 34 730 798                 | 1 036 018     | 1 344 465    | 1 194 125     | 1 084 487  | 634 429    | 406 909  | 40 431 231                       |
| WHEAT                                                     | 15 269 401                 | 364 849       | 470 308      | 322 803       | 399 391    | 176 629    | 124 666  | 17 128 047                       |
| BARLEY                                                    | 2 059 076                  | 25 846        | 12 746       | 15 955        | 8 859      | 18 717     | 2 257    | 2 143 458                        |
| TOTAL CEREALS                                             | 52 059 276                 | 1 426 713     | 1 827 520    | 1 532 883     | 1 492 737  | 829 775    | 533 833  | 59 702 736                       |

Source: TAXUD Surveillance System

### • Oilseeds and oilseeds products

Ukrainian exports of oilseeds and oilseeds products since April 2022 according to the Ukrainian State Customs Services.

| Table 3. Ukrainian oilseeds and oilseeds products exports since April 2022 |                            |               |              |               |            |            |           |                                  |
|----------------------------------------------------------------------------|----------------------------|---------------|--------------|---------------|------------|------------|-----------|----------------------------------|
| Quantity in tonnes                                                         | April 2022 - November 2024 | December 2024 | January 2025 | February 2025 | March 2025 | April 2025 | May 2025  | Total 1 April 2022 - 31 May 2025 |
| Rapeseed                                                                   | 9 783 084                  | 213 352       | 102 853      | 30 148        | 32 474     | 84 365     | 33 849    | 10 280 125                       |
| Sunflowerseed                                                              | 3 742 562                  | 1 085         | 20 120       | 979           | 24 100     | 979        | 368       | 3 790 194                        |
| Soyabeans                                                                  | 8 203 237                  | 359 628       | 223 034      | 381 578       | 369 156    | 330 187    | 253 208   | 10 120 029                       |
| Rapeseed oil                                                               | 701 113                    | 7 556         | 1 483        | 1 271         | 854        | 2 258      | 13 557    | 728 091                          |
| Sunflower oil                                                              | 14 469 730                 | 378 783       | 378 115      | 324 542       | 440 772    | 478 241    | 466 597   | 16 936 781                       |
| Soyaoil                                                                    | 826 801                    | 33 709        | 42 972       | 59 109        | 53 828     | 45 207     | 45 054    | 1 106 680                        |
| Sunflower & Rapeseed meals                                                 | 10 867 123                 | 416 790       | 274 134      | 197 854       | 346 699    | 307 216    | 328 817   | 12 738 633                       |
| Soyameal                                                                   | 1 535 264                  | 102 316       | 132 185      | 149 807       | 146 789    | 115 787    | 122 957   | 2 305 105                        |
| TOTAL OILSEEDS & PRODUCTS                                                  | 50 128 916                 | 1 513 219     | 1 174 896    | 1 145 287     | 1 414 673  | 1 364 240  | 1 264 406 | 58 005 637                       |

Source: Ukrainian State Customs Service

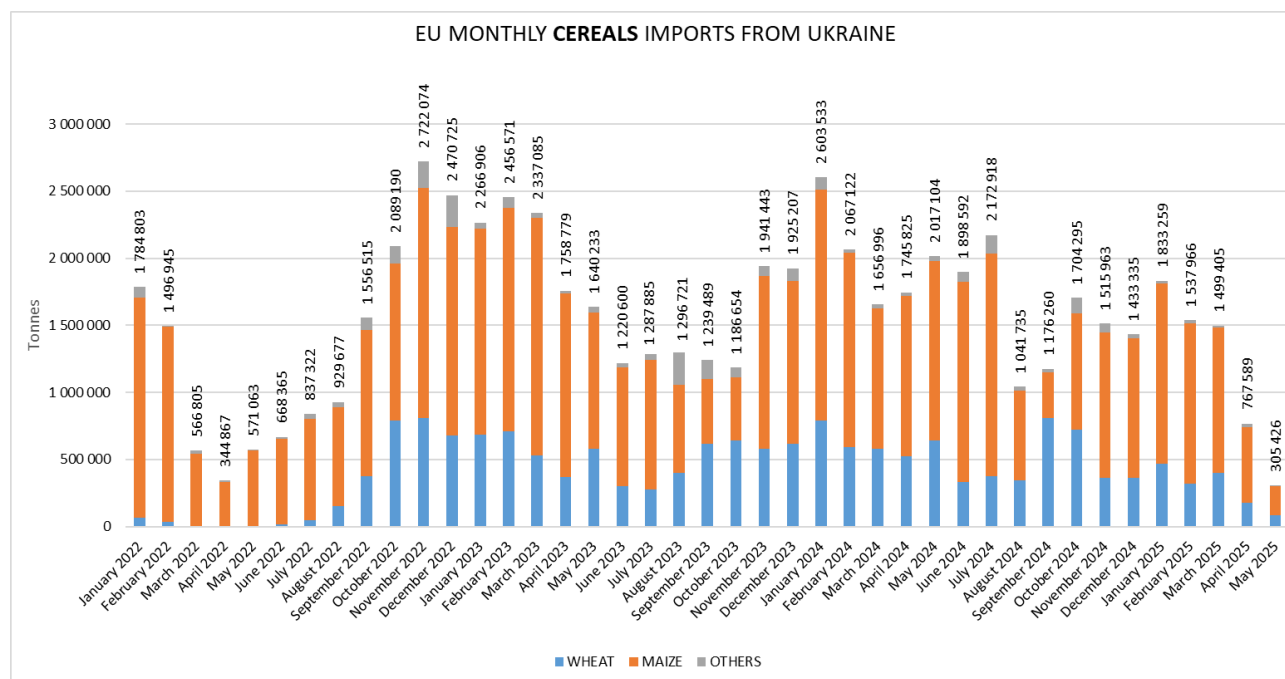
EU imports from Ukraine based on the TAXUD surveillance system.

| Table 4. EU oilseeds and oilseeds products imports from Ukraine since April 2022 |                            |               |              |               |            |            |          |                                  |
|----------------------------------------------------------------------------------|----------------------------|---------------|--------------|---------------|------------|------------|----------|----------------------------------|
| Quantity in tonnes                                                               | April 2022 - November 2024 | December 2024 | January 2025 | February 2025 | March 2025 | April 2025 | May 2025 | Total 1 April 2022 - 31 May 2025 |
| Rapeseed                                                                         | 7 956 066                  | 222 227       | 185 880      | 99 811        | 35 323     | 27 246     | 30 031   | 8 556 584                        |
| Sunflowerseed                                                                    | 2 564 472                  | 1 146         | 13 667       | 6 177         | 23 519     | 806        | 225      | 2 610 013                        |
| Soyabeans                                                                        | 3 027 469                  | 180 255       | 116 530      | 147 605       | 145 437    | 174 016    | 62 968   | 3 854 280                        |
| Rapeseed oil                                                                     | 305 894                    | 700           | 482          | 849           | 762        | 940        | 583      | 310 209                          |
| Sunflower oil                                                                    | 5 605 438                  | 187 022       | 182 265      | 184 324       | 250 841    | 185 169    | 218 970  | 6 814 028                        |
| Soyaoil                                                                          | 518 849                    | 5 653         | 3 458        | 8 003         | 25 021     | 43 957     | 42 629   | 647 571                          |
| Sunflower & Rapeseed meals                                                       | 3 824 816                  | 123 898       | 212 092      | 129 877       | 118 919    | 140 896    | 120 284  | 4 670 782                        |
| Soyameal                                                                         | 1 204 112                  | 69 173        | 98 520       | 159 288       | 102 881    | 85 760     | 89 671   | 1 809 405                        |
| TOTAL OILSEEDS & PRODUCTS                                                        | 25 007 115                 | 790 075       | 812 894      | 735 934       | 702 703    | 658 790    | 565 361  | 29 272 872                       |

Source: TAXUD Surveillance System

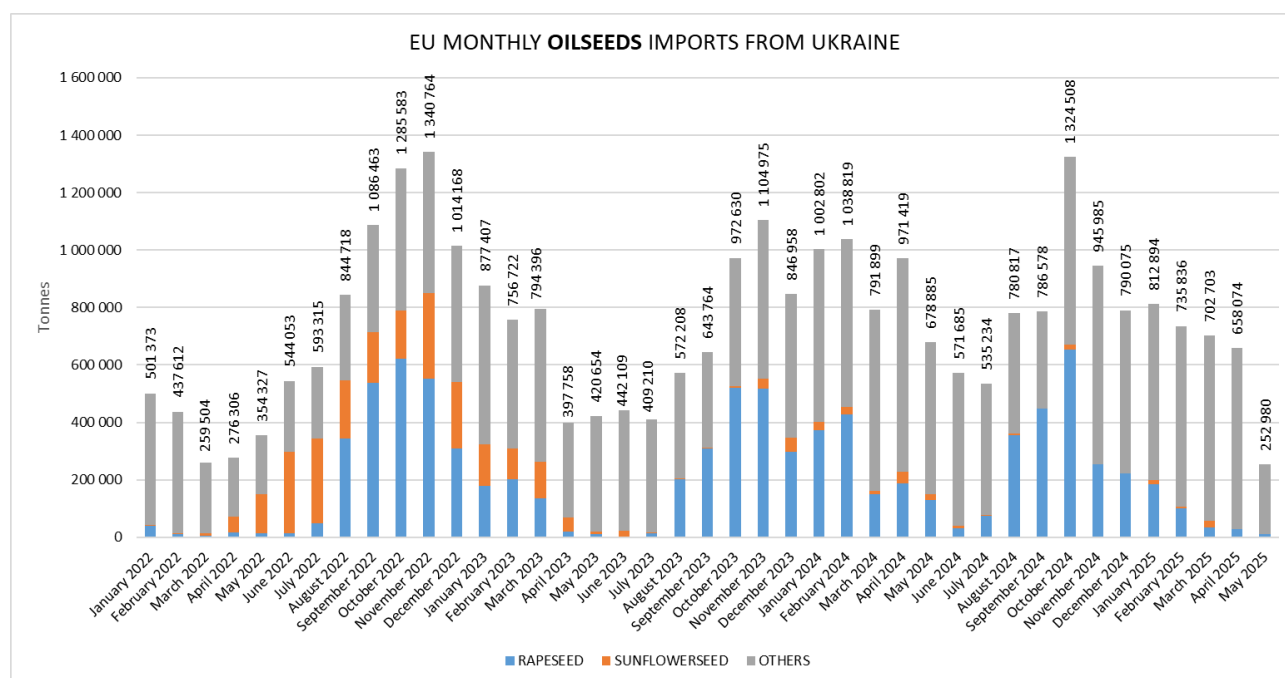
## Monthly EU imports of cereals and oilseeds from Ukraine (data from TAXUD surveillance from 1/1/2022 to 31/5/2025)

- EU cereals imports from Ukraine:



Source: TAXUD Surveillance System

- EU oilseeds imports from Ukraine

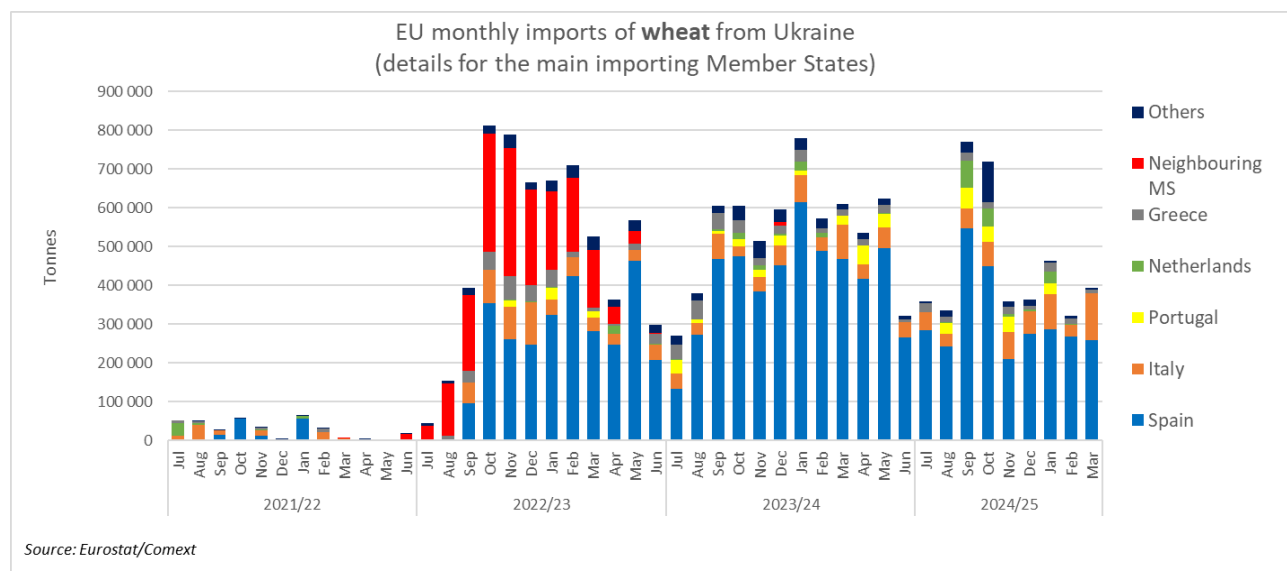


Source: TAXUD Surveillance System

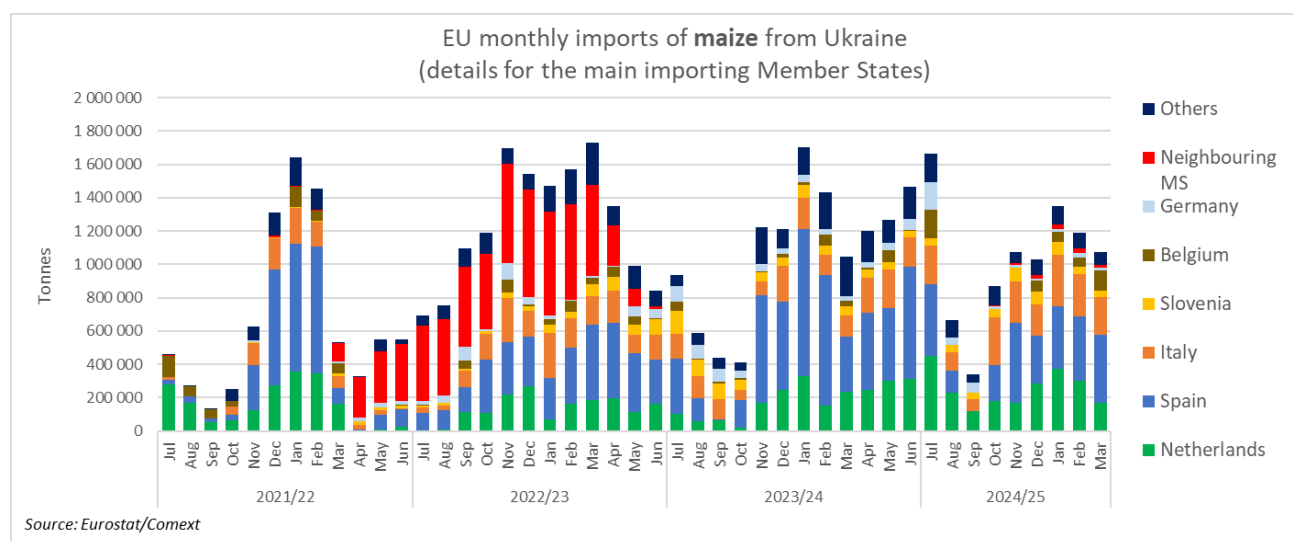
## 6. Main importing Member States (data based on Eurostat/Comext)

Details for the **main importing EU Member States** for the period 1/7/2021 to 31/3/2025.

- EU monthly imports of **wheat** from Ukraine

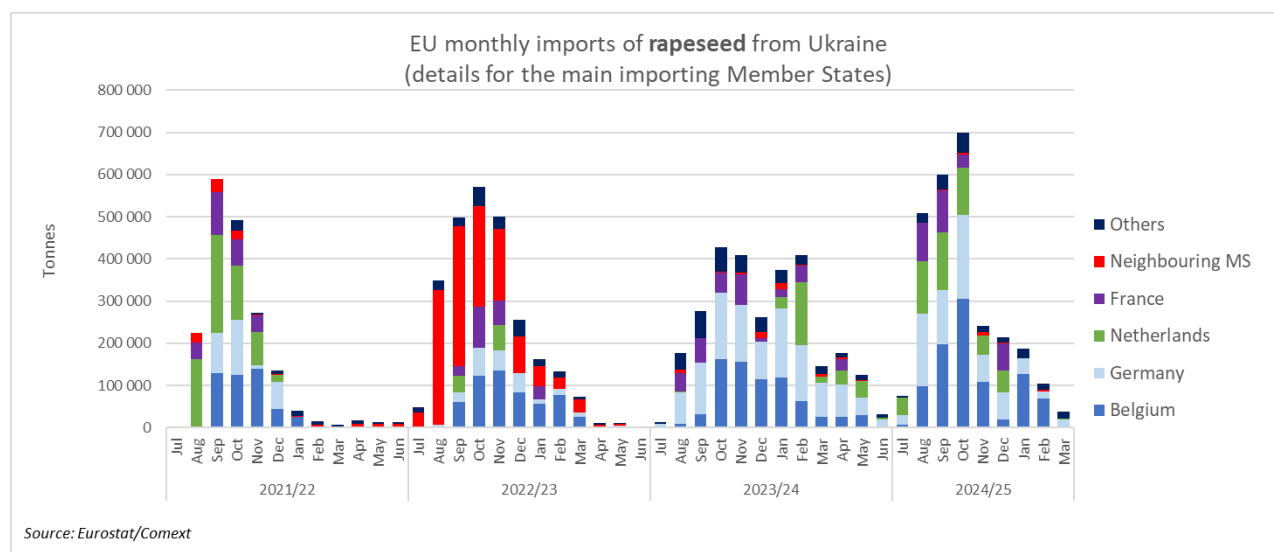


- EU monthly imports of **maize** from Ukraine

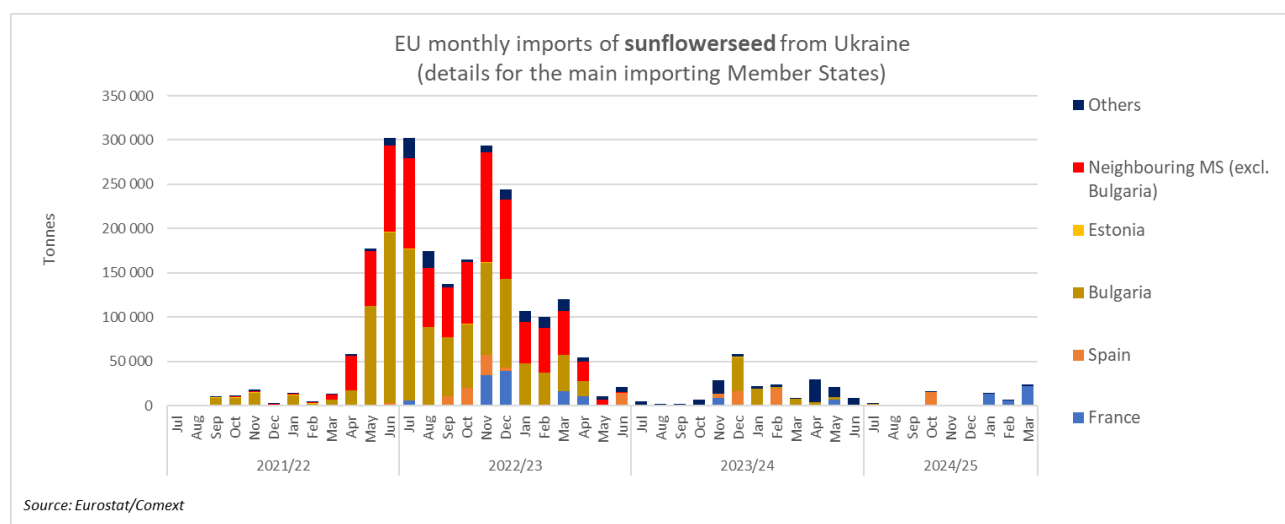




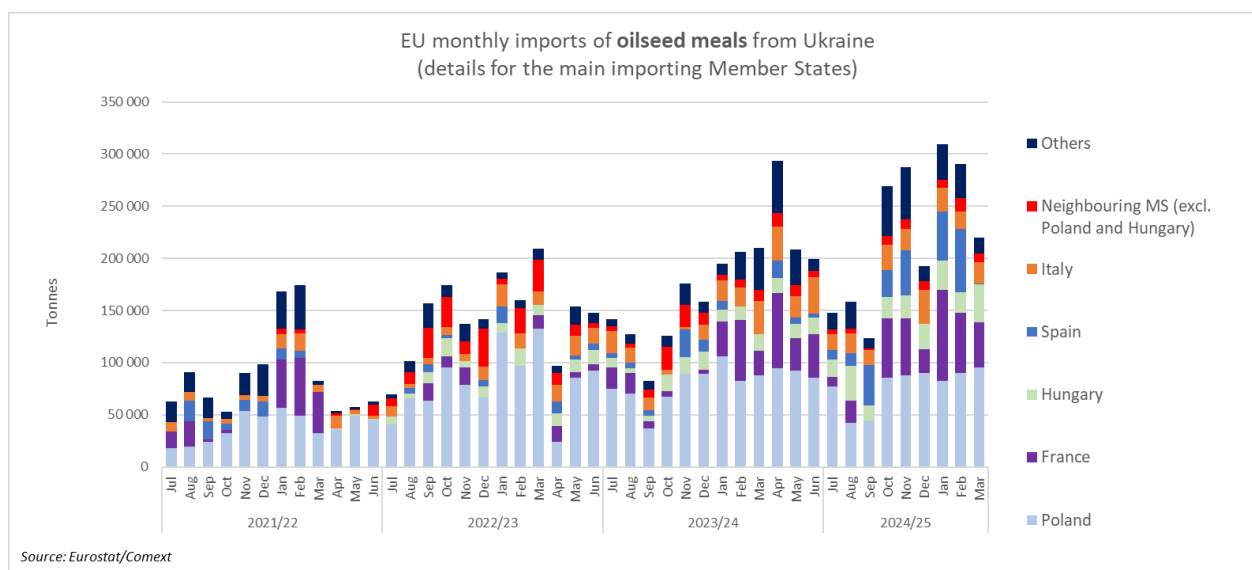
- EU monthly imports of **rapeseed** from Ukraine



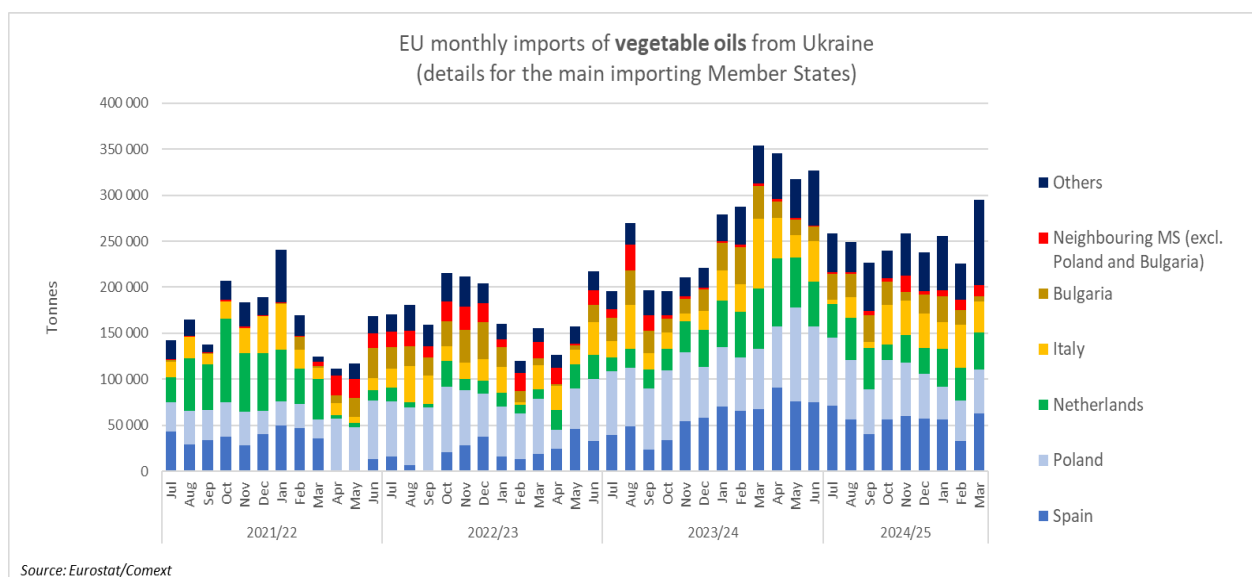
- EU monthly imports of **sunflower seed** from Ukraine



- EU monthly imports of **oilseed meals** from Ukraine

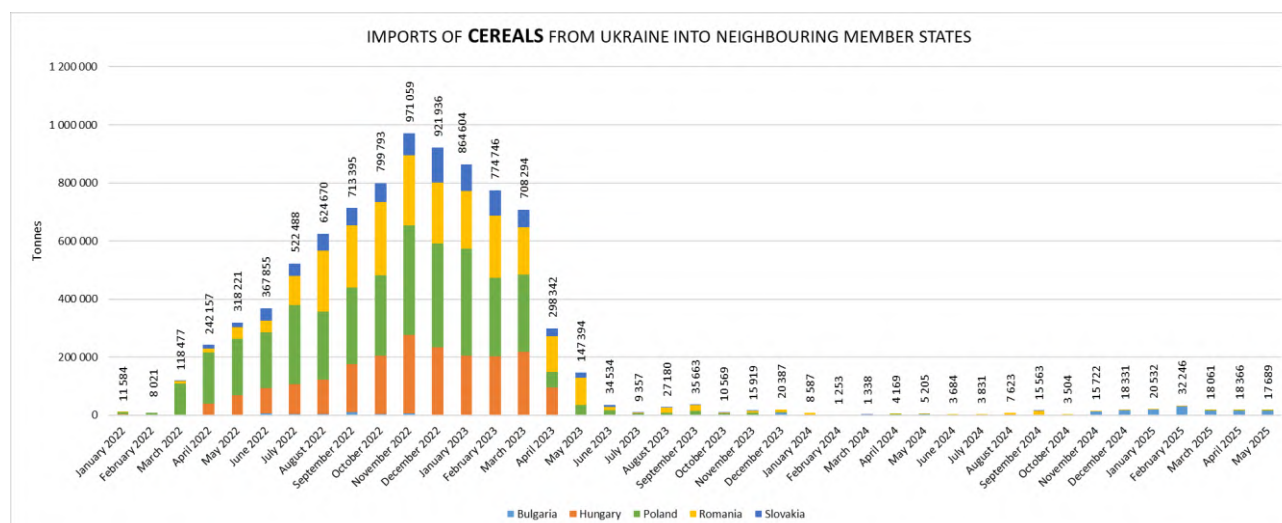


- EU monthly imports of **vegetable oils** from Ukraine



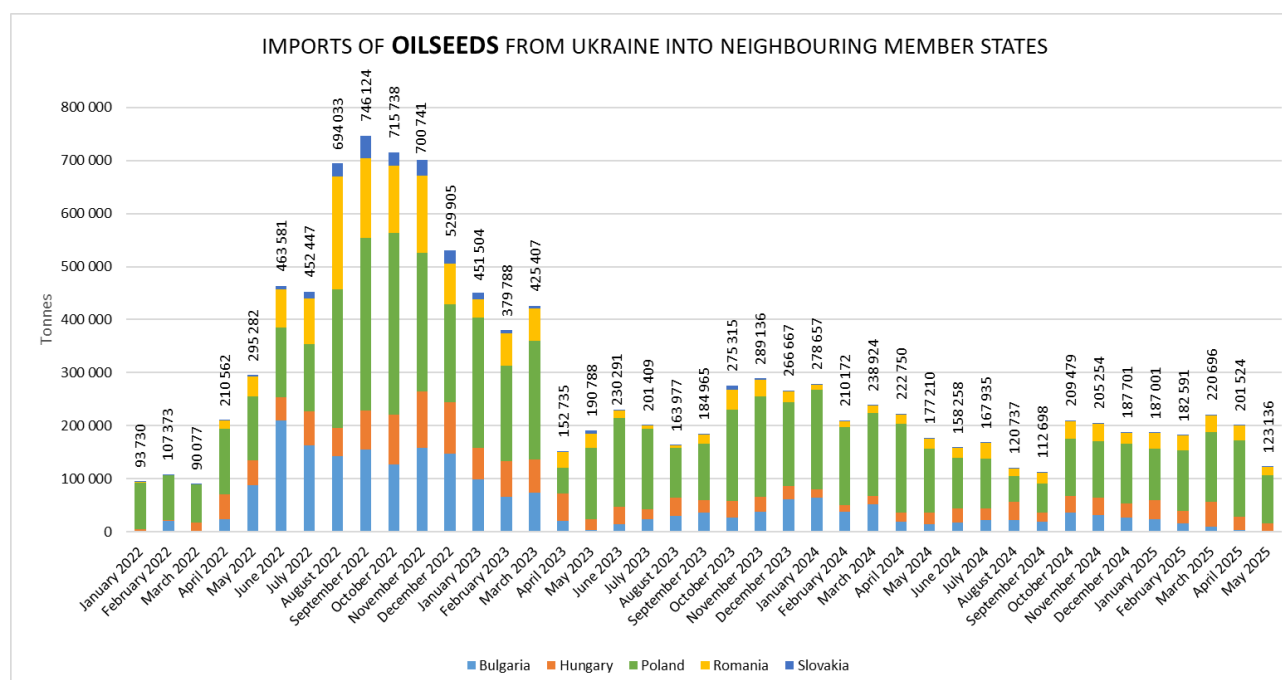
## 7. Imports into Member States neighbouring Ukraine (from 1/1/2022 to 31/5/2025)

- **Cereals** imports from Ukraine by the five neighbouring Member States



Source: TAXUD Surveillance System

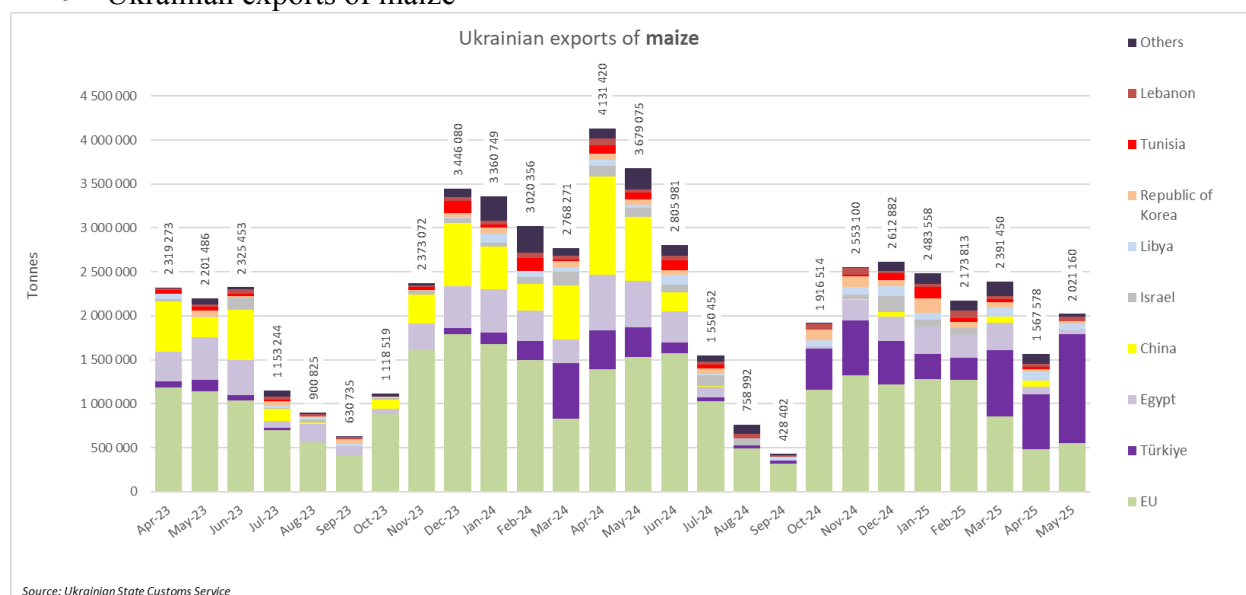
- **Oilseeds** imports from Ukraine by the five neighbouring Member States



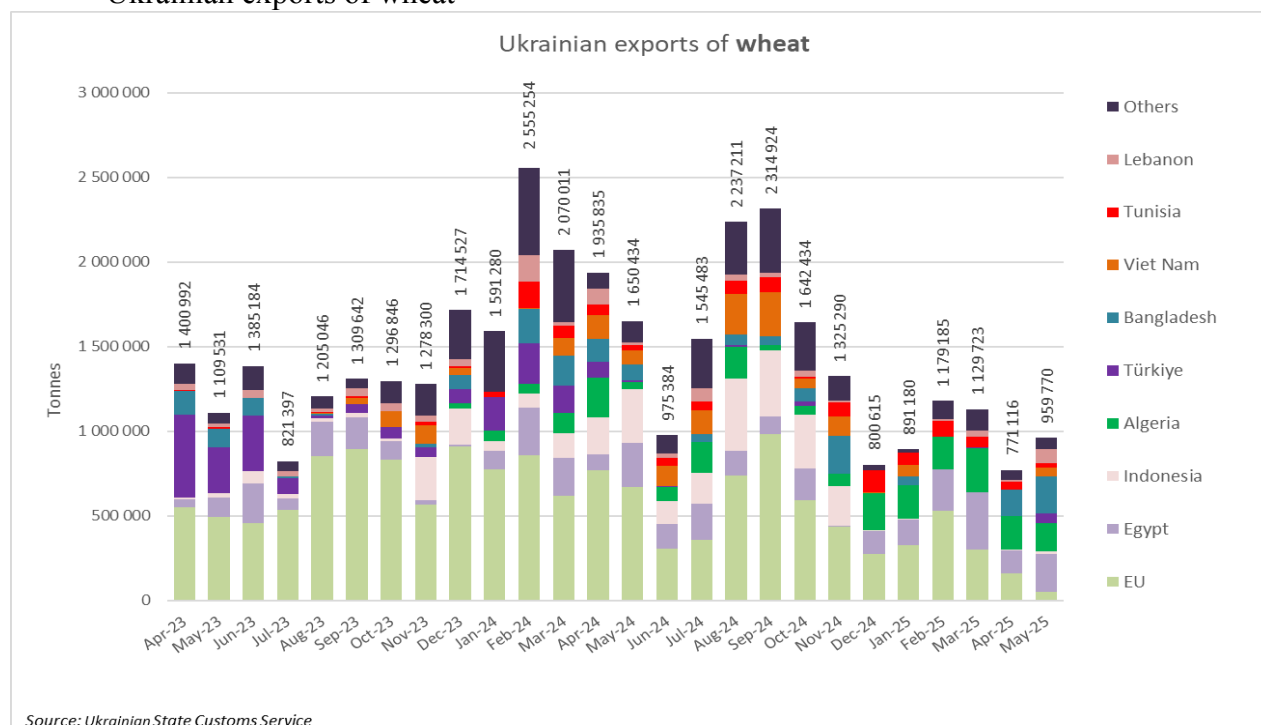
Source: TAXUD Surveillance System

## 8. Ukrainian export destinations (data is based on the Ukrainian State Customs Service<sup>18</sup>)

### • Ukrainian exports of maize



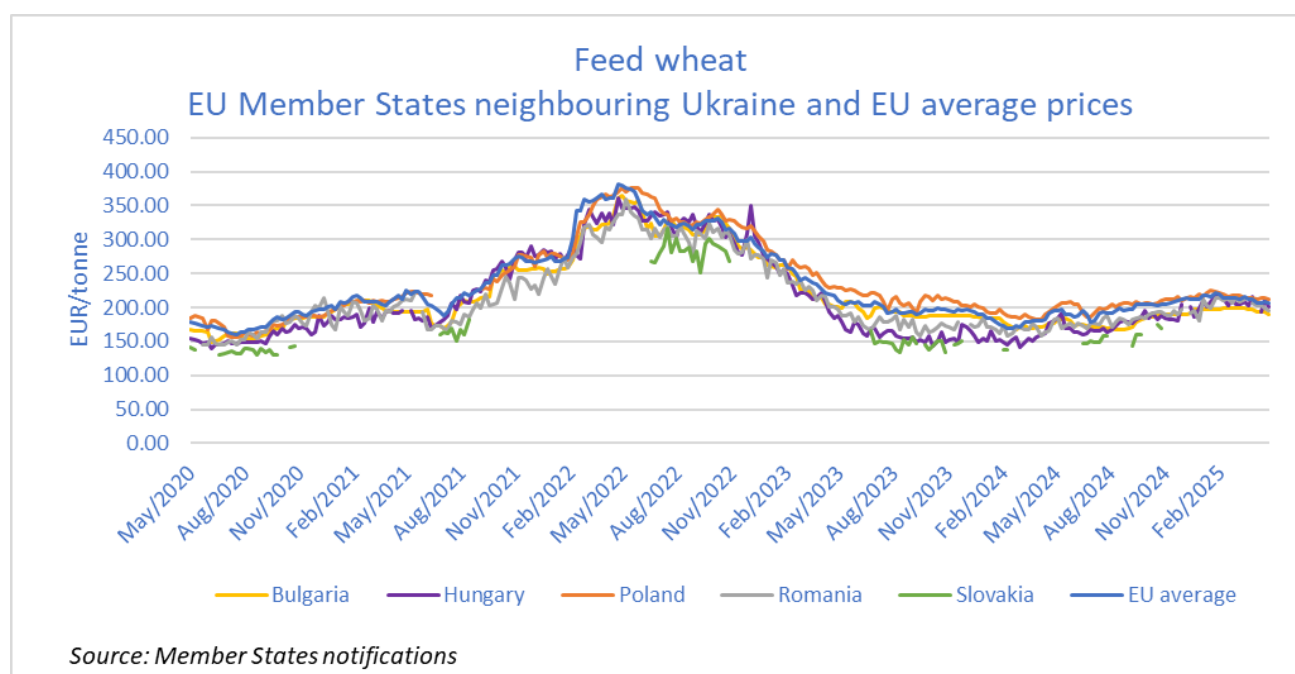
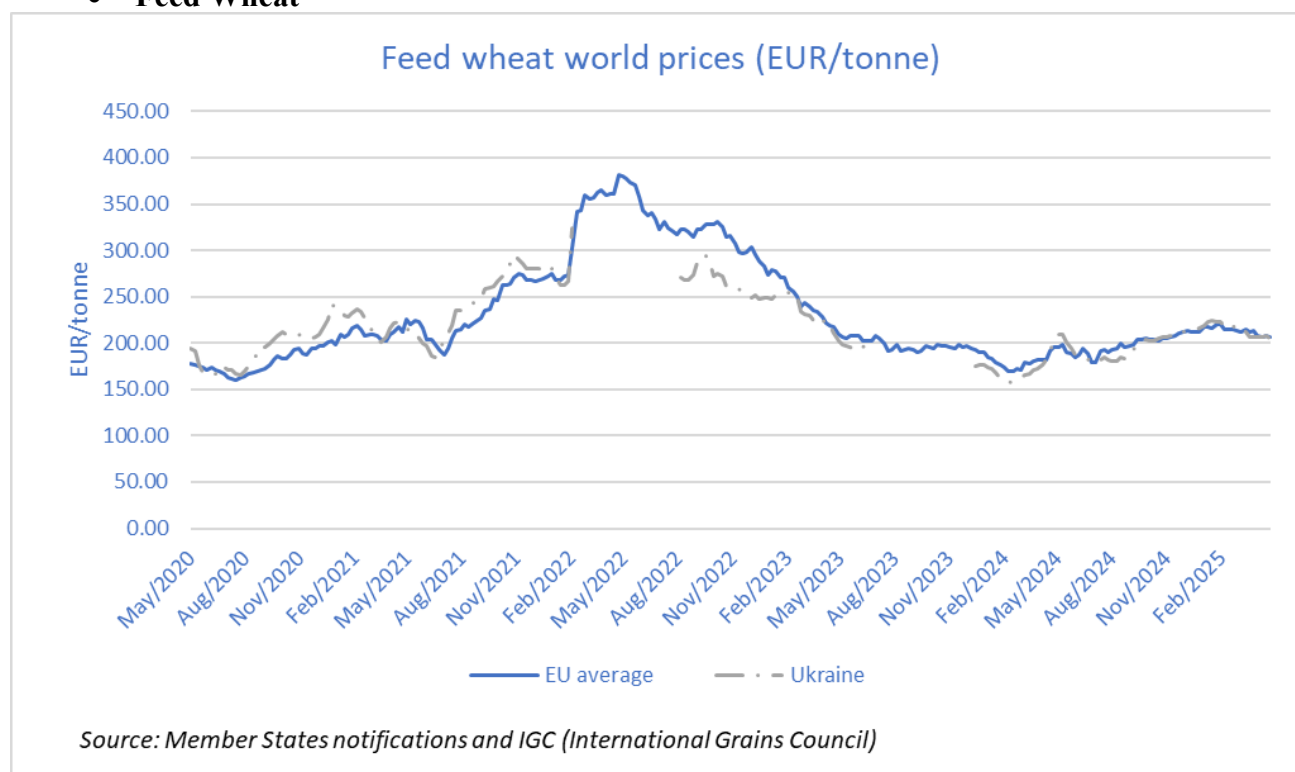
### • Ukrainian exports of wheat



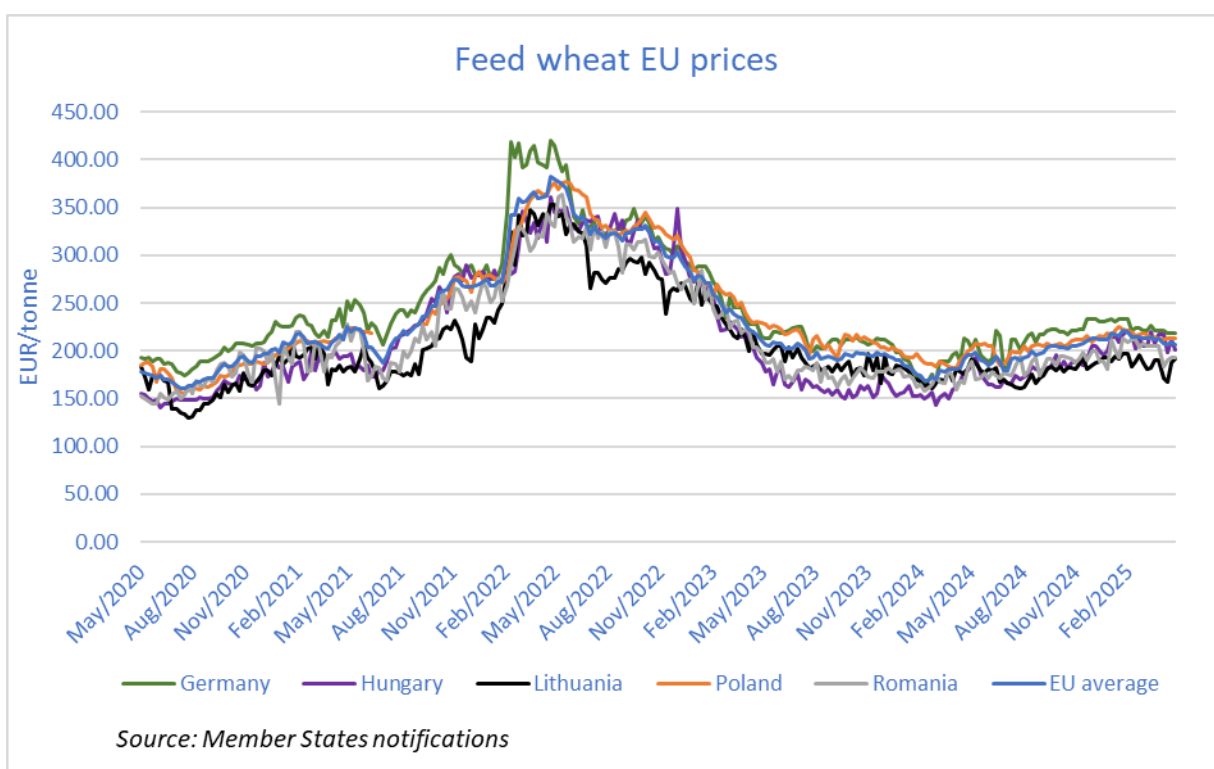
<sup>18</sup> What is declared as destined for the EU is not necessarily imported into the EU. Some declarations indicate the EU as the final destination but the products only transit through the EU. For example, during a period of 1 July to 31 December 2023 there were 11.25 million tonnes of maize, wheat and barley declared as leaving Ukraine for the EU but only 8.42 million tonnes were registered as imported into the EU (based on the EU customs data). Therefore, it is important to highlight that Ukrainian State Customs Services overestimate the share of the EU in Ukrainian market destinations. Export declarations for other destinations do not necessarily have a similar issue, however, a final destination of a shipment can change at any point during the transport and the official imports will be registered elsewhere.

## 9. Price developments for main cereals and oilseeds (in the EU and globally)

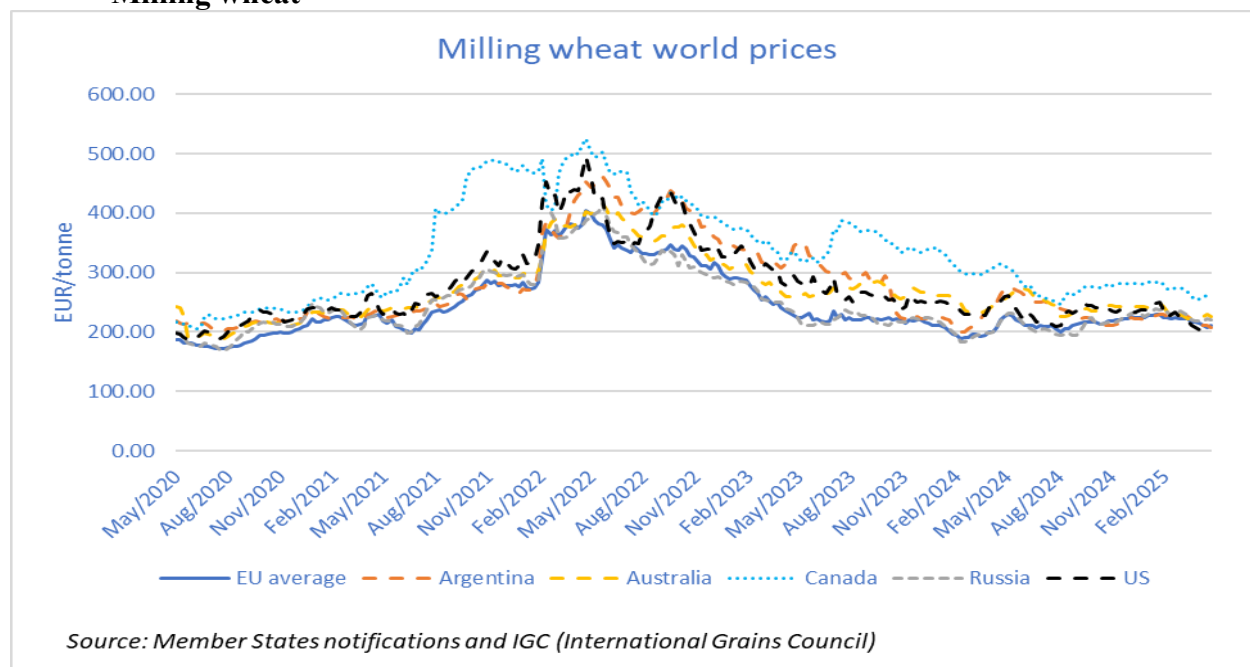
### • Feed Wheat<sup>19</sup>



<sup>19</sup> EU average feed wheat price is based on prices of major soft wheat producing Member States: BG, DE, HU, LT and PL (FR representative price not available). The prices are weighted based on these Member States soft wheat five-year trimmed average production.

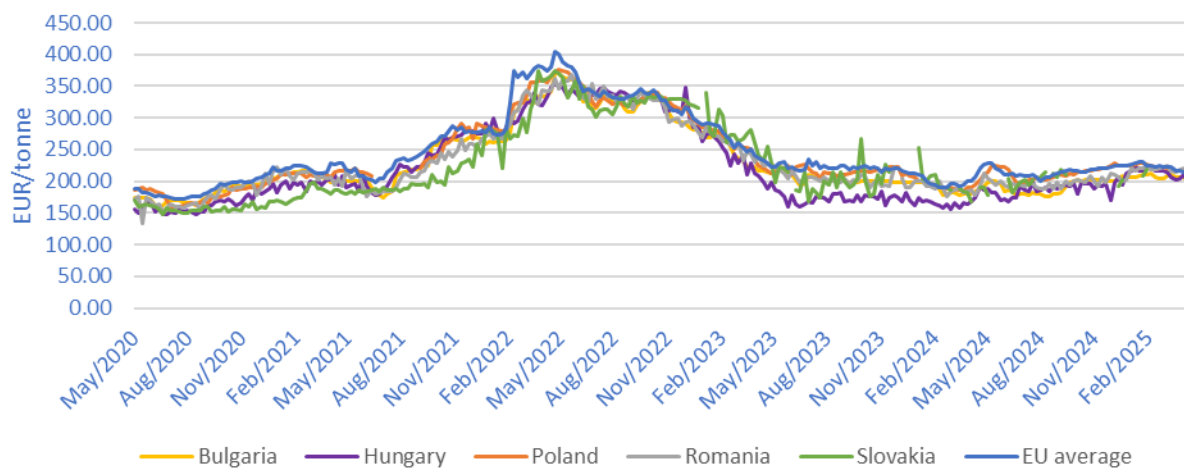


- **Milling wheat<sup>20</sup>**



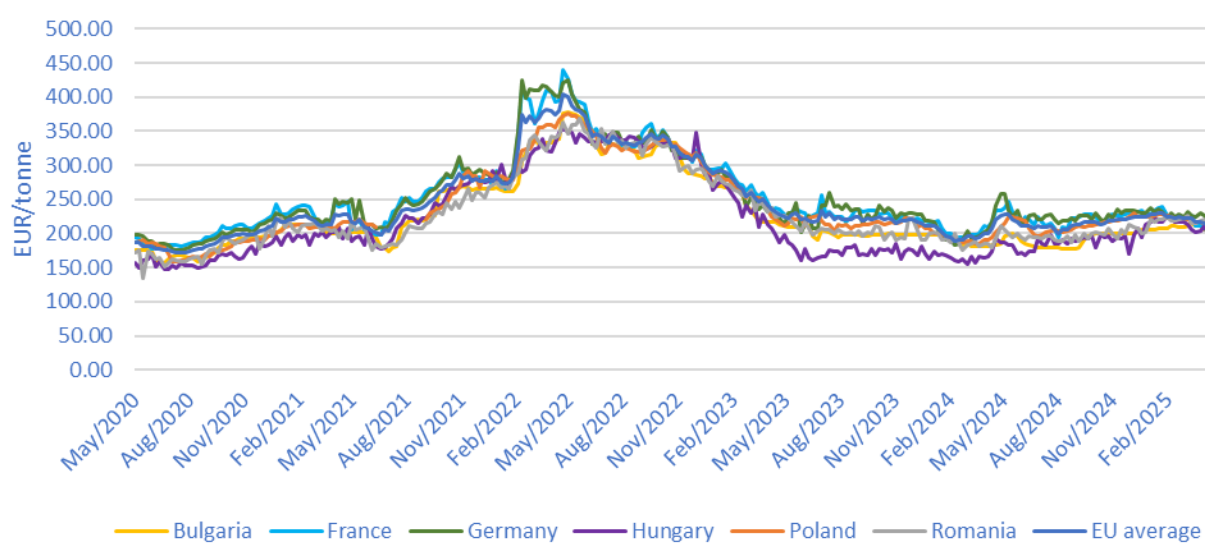
<sup>20</sup> EU average milling wheat price is based on prices of major wheat producing Member States: BG, CZ, FR, DE, HU, LT, PL, RO, ES and SE. The prices are weighted based on these Member States soft wheat five-year trimmed average production.

### Milling wheat EU Member States neighbouring Ukraine and EU average prices



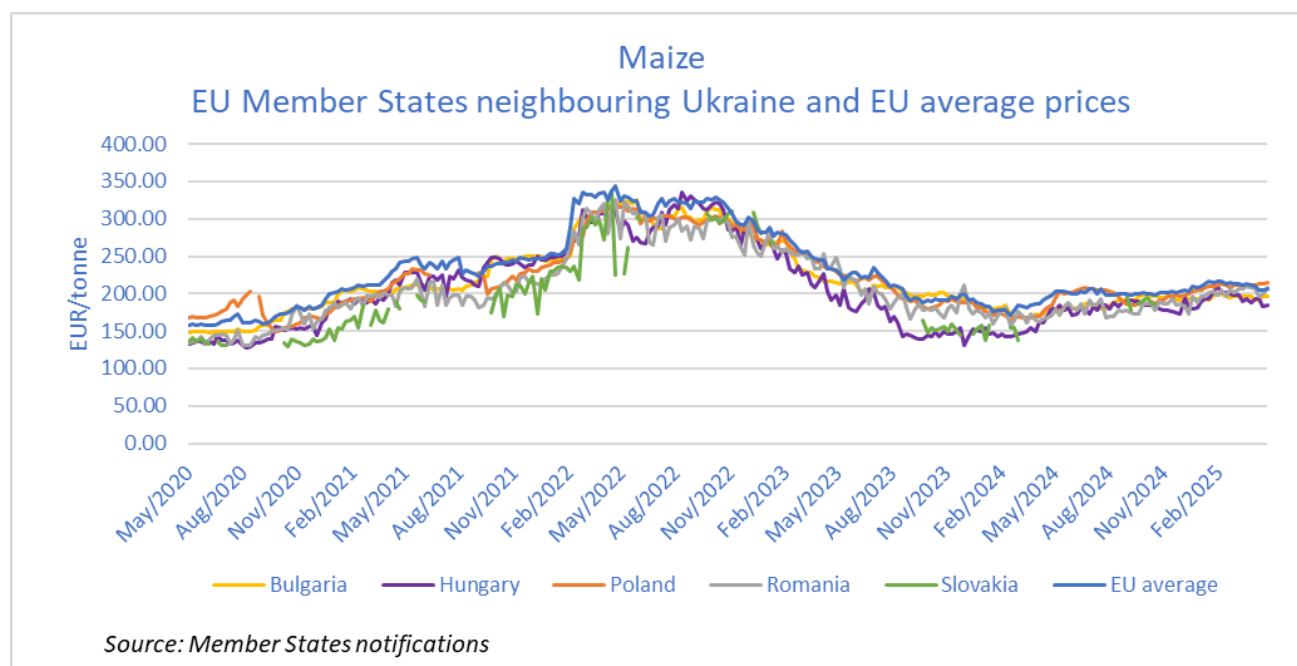
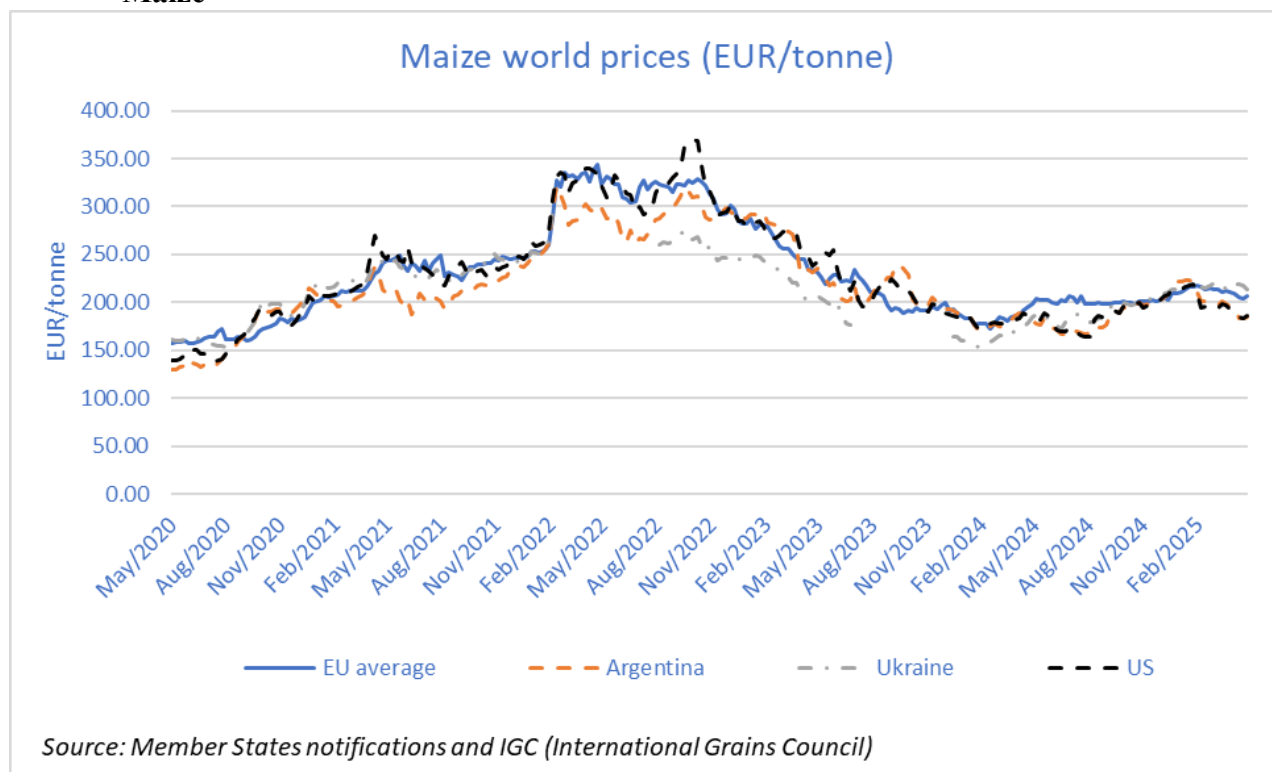
Source: Member States notifications

### Milling wheat EU prices



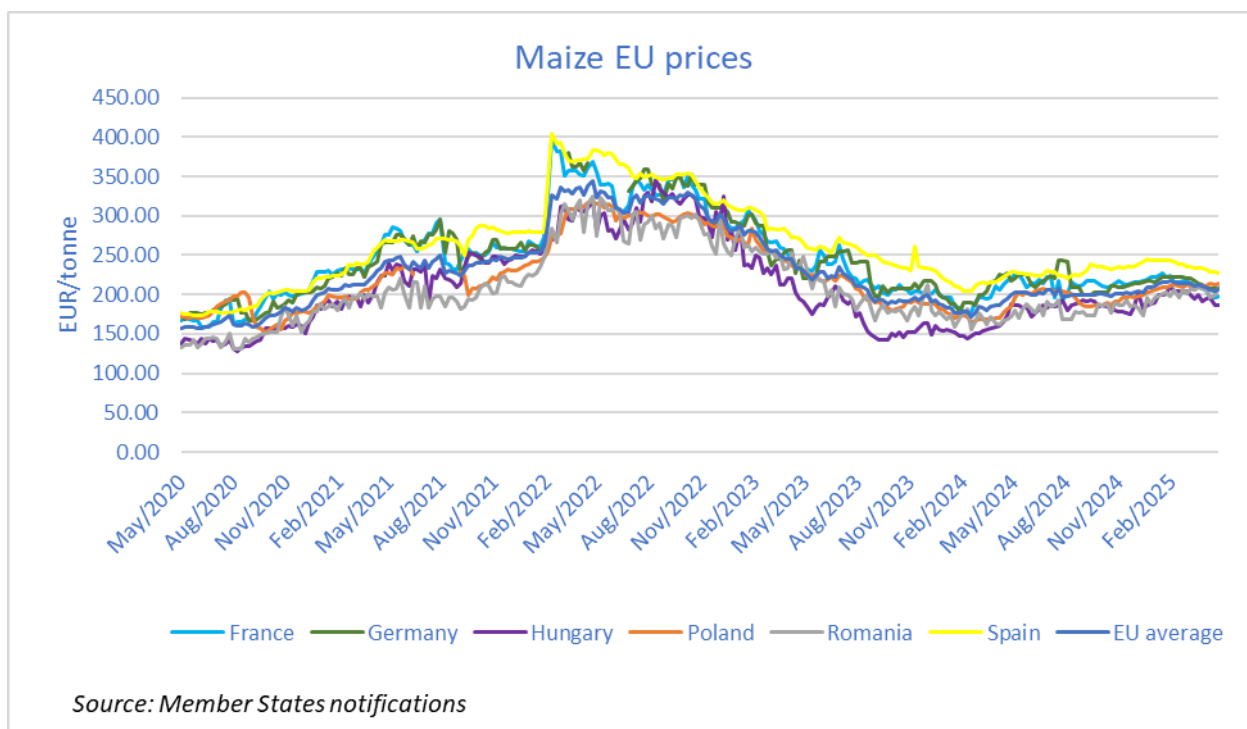
Source: Member States notifications

- **Maize**<sup>21</sup>

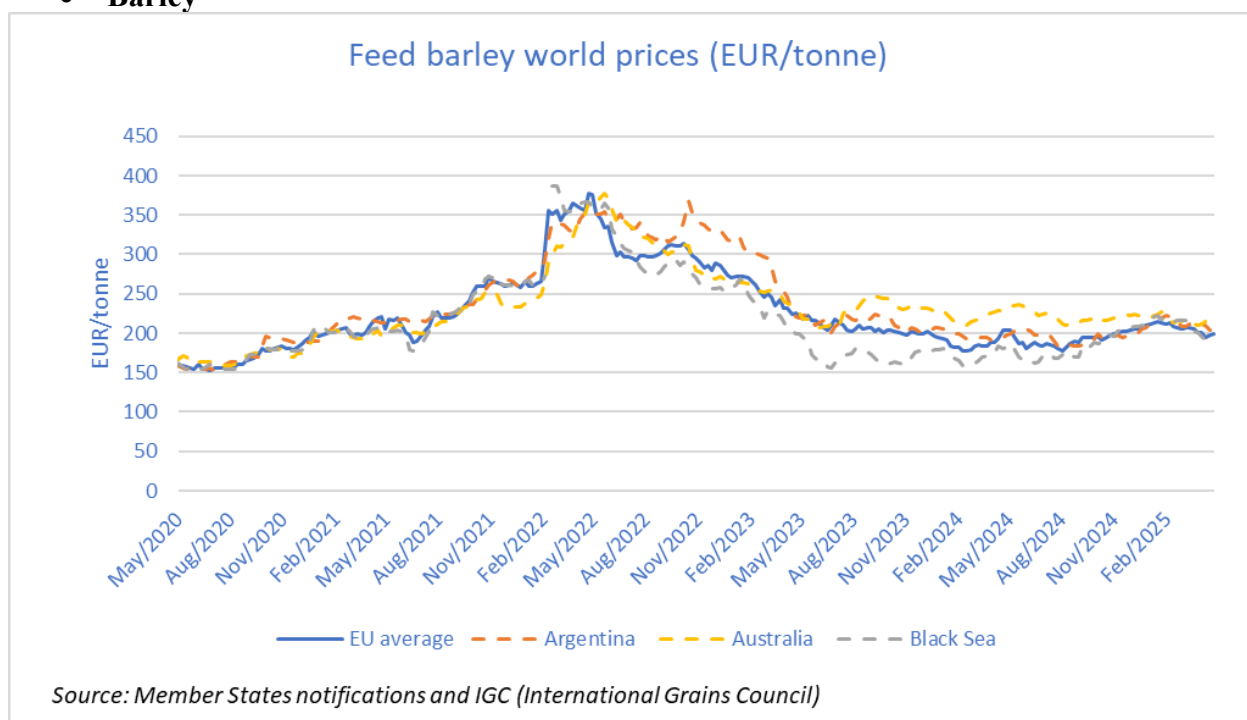


<sup>21</sup> EU average maize price is based on prices of major maize producing Member States: AT, BG, HR, FR, DE, HU, IT, PL, RO and ES. The prices are weighted based on these Member States five-year trimmed average maize production.



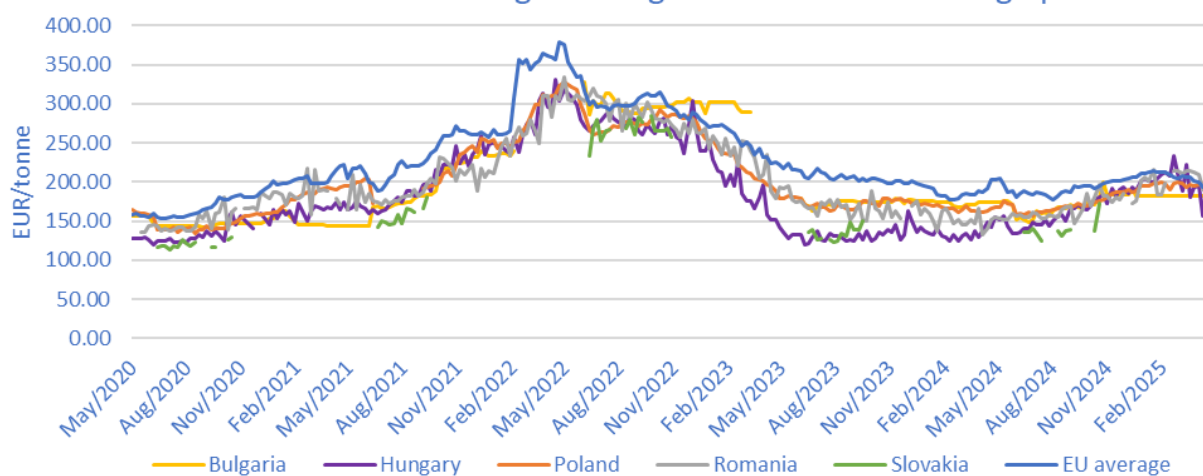


- **Barley<sup>22</sup>**



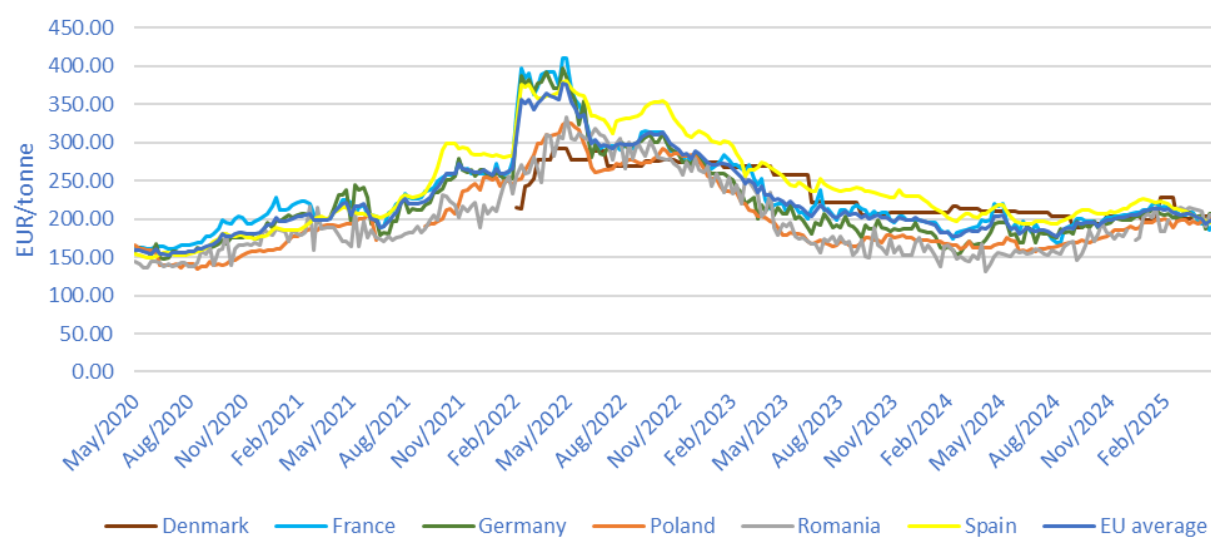
<sup>22</sup> EU average Feed barley price is based on prices of major barley producing Member States: DK, FR, DE, PL, RO and ES. The prices are weighted based on these Member States barley five-year trimmed average production.

### Feed barley EU Member States neighbouring Ukraine and EU average prices



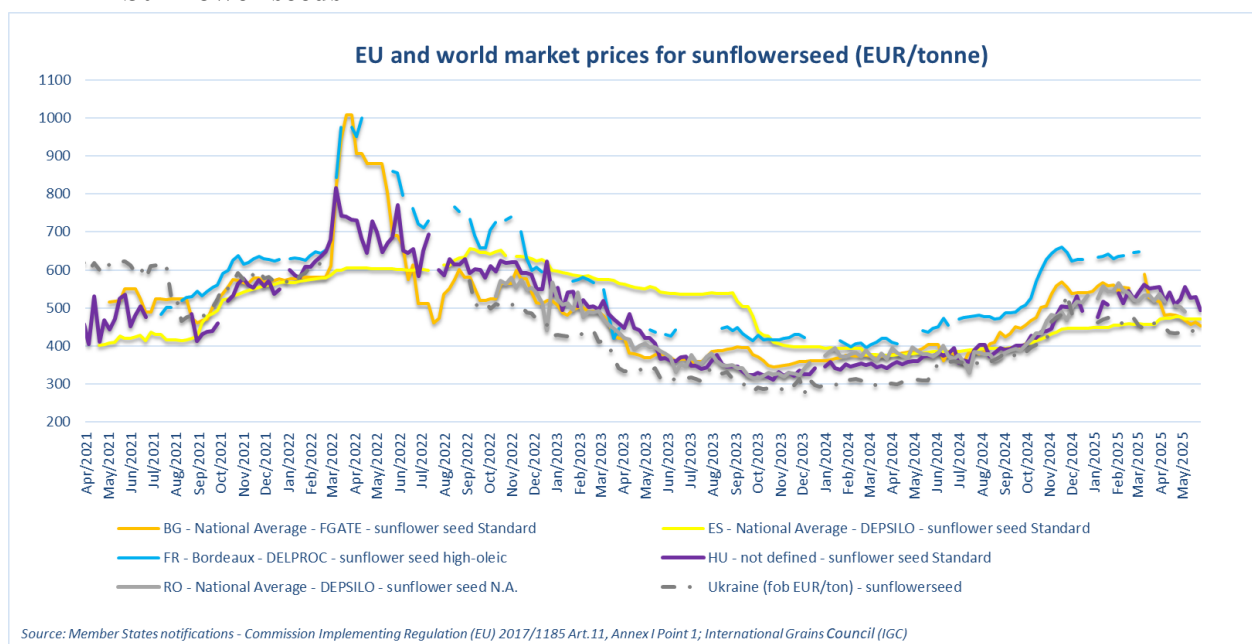
Source: Member States notifications

### Feed barley EU prices



Source: Member States notifications

- **Sunflower seeds**



- **Rapeseeds**

