European Commission

Agriculture and rural development

SHORT-TERM OUTLOOK for EU agricultural markets in 2025

July 2025

EUROPEAN COMMISSION

Directorate-General for Agriculture and Rural Development
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European Commission
B-1049 Brussels

Manuscript completed in July 2025

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Luxembourg: Publications Office of the European Union, 2025

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PDF ISSN 2600-0873 KF-01-25-020-EN-N

While all efforts are made to provide sound market projections, uncertainties remain.

Please cite this publication as:
European Commission: Directorate-General for Agriculture and Rural Development, *Short-term outlook for EU agricultural markets in 2025*, Publications Office of the European Union, 2025.

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HIGHLIGHTS

Amid global uncertainties, **EU agricultural markets remain generally resilient**, with an increasing cereal production, a sharply recovering olive oil production, stable milk deliveries and firm output prospects for poultry. Fruits and vegetables show diverse developments due to adverse weather conditions; production prospects are on a downward trend for sugar, wine and, less so, for ruminants. Geopolitical threats, climate-related challenges, and evolution of trade policies of the major players like the US and China could affect the stability of the global and EU markets. As a result, this emphasises **the need for increased vigilance and strategic planning to navigate the uncertain landscape.**

In this environment, the role of the various market observatories, the EU Agri-Food Chain Observatory and the European Food Security Crisis preparedness and response Mechanism (EFSCM) remain as relevant as ever. As reported in the Spring 2025 edition of the State of Food Security in the EU, food affordability continues to be a relevant concern for the EU food security in the wake of risks to food supply from high and volatile input costs, extreme weather events and import dependencies on certain inputs.

This summer edition of the 2025 EU short-term outlook was prepared in **an unusually volatile and unpredictable environment.** The usual risks of markets disruption in the EU such as localized weather events and outbreaks of animal diseases are accompanied by a deteriorating geopolitical climate, with potentially negative impacts on global trade, availability and costs of energy and fertilisers, and the general macroeconomic environment.

Despite the erratic weather patterns, geopolitical conflicts and trade policy instability, **the EU agricultural markets have been resilient**, with some level of anticipation reflected in imports of fertilisers, and benefitted from frontloading in key export destinations (to the US) to avoid shocks linked to possible changes of the US-EU trade relationship. Heightened trade tensions, along with policy uncertainty, have weakened the global economic outlook for 2025, also impacting the EU. **The growth of the EU economy is forecast lower at 1.1% in 2025 and 1.5% in 2026.**

With the recent **appreciation of the euro against dollar**, EU exports could become more expensive towards the US. On the other hand, the stronger euro can dampen the costs of imported inputs (energy and fertilisers) and could alleviate inflation for food and services and contain **food inflation, which continues to rise above general inflation.**

Consumer prices for fruits, and animal products (meat, but also eggs and milk) have been increasing, while prices for cereals, wine, oils and fats, and vegetables have stabilized or even declined. The complex interplay between inflation, economic growth, and financial market conditions remains highly unpredictable due to observed global uncertainties.

While oil prices were expected to fall to USD 50/barrel due to OPEC+ oversupply and lower demand, tensions in the Middle East could reverse this trend; natural gas prices also remain high. However, **EU farmers are experiencing stable input costs in the recent months**, although at higher levels and at a disadvantage compared to key export competitors.

Fertiliser affordability is stable relative to crop prices, though potential geopolitical risks could pose future challenges.

Despite a rain deficit in some EU regions, **winter crops have generally good growing prospects**, while continued dryness could negatively affect some spring and summer crops.

Arable crops

In 2025/26, **EU cereals production is expected to increase** by 4.1% above the 5-year average, recovering from a previous decline due to poor weather. Favourable weather conditions are boosting yields for major crops like soft wheat and barley, while planting area is slightly expanding as well. This increased production could enhance the EU's trade balance, raising exports by 26% and reducing imports by 19%, while domestic demand stays relatively stable.

EU oilseeds production is expected to increase by 12% in 2025/26, mainly due to higher yields for rapeseed and sunflower. Oilseed meal production rises with the increased seed output. Vegetable oil production is set to grow by 6%, although consumption and imports are decreasing due to reduced palm oil use, keeping exports steady. EU protein crops production is forecast to decline year-on-year but remain above the 5-year average.

In 2025/26, **EU white sugar production could decline** (8%), prompting increased imports and declining exports. The main reason is a decline in sugar beet planting areas

which grew in 2024/25, driven by record prices. This led to an increasing production (6.5%). With stable domestic consumption and a shift in trade dynamics, imports are expected to drop by over 50% in 2024/25, while exports surge by 87% over the 5-year average.

Specialised crops

The initially favourable prospects of **2025/26 EU olive oil production might be hampered** due to recently observed hot weather in Spain and Portugal. After experiencing record highs in early 2024, EU olive oil prices have significantly decreased by June 2025 due to a 37% rise in EU production in the ongoing marketing year 2024/25, leading to revitalized exports and imports and consumption returning to the 5-year average after several years of a decline.

Until now, **no major event has threatened 2025/26 EU wine production** except for some localized impacts in certain regions. In a still ongoing marketing year 2024/25, EU wine production is projected to decline to its lowest in 20 years at 137 million hl, primarily due to significant drops in France and Germany, despite increases in Italy and Spain, with consumption and exports also falling amidst stable imports and a long-term trend of reduced demand. At the end of 2024/25, this could result in an easier situation in the accumulation of stocks.

In 2024/25, **EU apple production could drop** by 4% due to adverse weather, particularly affecting Poland, the largest producing country. Stable fresh consumption alongside increased processed apple consumption keeps prices high.

The **EU production of peaches and nectarines could fall** by 5.8% in 2025, due to reduced yields and area, particularly in Greece. This could lead to record-high imports while the quality of the fruit could sustain consumer interest.

The **EU production of oranges is expected to rise** by 4.6% from record lows in 2024/25, driven by favourable weather in Spain and Portugal, while fresh consumption remains stable and so the growth is channelled into processing. Consumption of fresh oranges could be stable as well but continues declining for processed products from oranges.

In 2025, **EU tomato production is expected to decrease** by 2.6%, mainly due to a decline in processing tomatoes, while fresh tomato production remains stable but below the 5-year average. Considering the main trade destinations/origins, EU imports from Morocco and EU exports to the UK are increasing.

Animal products

EU milk deliveries are expected to remain stable in 2025 with improved milk composition balancing the overall supply for processing. Favourable grassland conditions support this stability, although country-specific variations and animal disease outbreaks introduce uncertainty, while high milk prices and stabilized input costs sustain farmer margins.

In 2025, **EU cheese production is expected to increase** slightly, but export growth may be limited by global competition and economic slowdowns in key markets, while butter production decreases and high prices limit the EU competitiveness. **Fresh dairy products and whey production see modest gains**, yet SMP and WMP EU exports face challenges from weak demand and global competition, with overall EU dairy export prospects constrained by high EU prices and global trade tensions.

In 2025, **EU beef production is set to decline**, due to smaller cattle herds, while exports are limited by tight supply and competition, and imports rise amid high market prices.

EU pigmeat production could remain stable in 2025, supported by positive demand. EU export opportunities are limited as the EU prices are above international prices.

EU poultry production is expected to rise by 1.8%, supported by strong consumer demand and favourable prices despite challenges like HPAI and hatching egg shortages. EU imports continue growing due to elevated EU prices, though Brazilian supply disruptions may impact overall import increases.

EU sheep and goat production could decline by 2% due to herd reductions and some seasonal factors, while meat exports decrease slightly and imports surge amid high EU prices.

ABBREVIATIONS

ASF	African Swine Fever
AT	Austria
bbl	barrel (approximately 159 litres)
BE	Belgium
BG	Bulgaria
CY	Cyprus
CZ	Czechia
DE	Germany
DK	Denmark
ECB	European Central Bank
EE	Estonia
EL	Greece
ES	Spain
EU	European Union
EUR	Euro
FDP	fresh dairy products
FI	Finland
FR	France
FTA	Free Trade Agreement
GDP	gross domestic product
GIP	gross indigenous production
HPAI	highly pathogenic avian influenza
HR	Croatia
HU	Hungary
IE	Ireland
IT	Italy
K	potassium
LT	Lithuania
LU	Luxembourg
LV	Latvia
MENA	Middle East and North Africa
MMBtu	Metric million British thermal units (approximately 293.1 kilowatt hours)
MS	Member States
MT	Malta
N	nitrogen
NL	the Netherlands
P	phosphorus
PL	Poland
p.p.	percentage point
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovakia
SMP	skimmed milk powder
STO	short-term outlook
UK	United Kingdom
US	United States
USD	US dollar
WMP	whole milk powder

MARKET FUNDAMENTALS

KEY MESSAGES

EU real GDP growth expected to be lower than anticipated (+1.1% 2025, +1.5% in 2026)

EU inflation projected towards 2%, but food inflation might be higher in 2025

Decent yields for winter crops, but summer crops in shortage of water

HIGHLIGHTS

Since the 2024 Autumn short-term outlook, macroeconomic and energy prospects for 2025 have become subject to even more geopolitical uncertainties, particularly with the repercussions of US trade policy on international commodity markets, global economic growth and exchange rates. Combined with the ongoing effects of the conflicts in Ukraine and in the Middle East region, macroeconomic and energy developments remain highly uncertain as alternative pathways for oil and natural gas commodity prices would have a significant impact in the short term.

EU economic growth is forecast at 1.1% in 2025 and 1.5% in 2026, which is weaker than what was expected in autumn last year, and it is also expected to be burdened by the aforementioned factors. General inflation might return to 2% levels faster.

Food prices are on a modest inflationary path, however some products that faced larger price hikes in previous years, such as sugar and oils, are showing a deflationary direction. Despite these, food inflation might be higher than general inflation in 2025, which, combined with the modest economic growth and its impact on household incomes, depicts dampened growth prospects for EU food demand.

Favourable weather last winter is expected to return decent yields for winter crops, while rainfall deficits might pose a challenge for yields of summer crops in various parts across Europe.

Agricultural input costs for farmers have generally stabilised in 2025, while remaining approximately 30% above the 2020 average. Despite global volatility, nitrogen fertilisers in the EU remained well-supplied, largely thanks to a strong surge in imports in early 2025, however risks in the Middle East region could impact the production of nitrogen fertilisers by North African suppliers, being the EU's main external supplier.

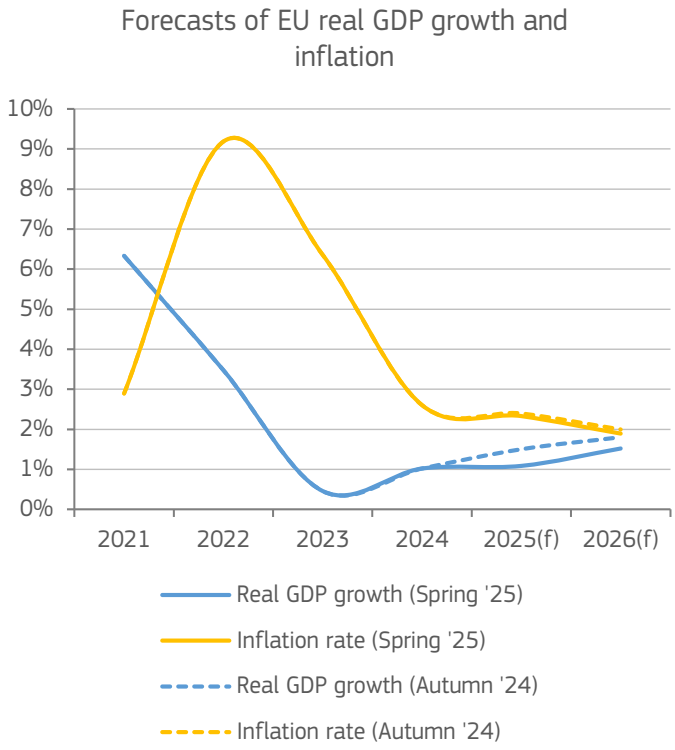
Industrial electricity and gas price differentials between the EU and its trading partners remained higher in 2024 than pre-2022 levels, which, combined with the appreciation of the euro against the US dollar, could weigh on the competitiveness of EU agri-food commodities and the EU trade balance.

MACRO-ECONOMIC ENVIRONMENT

EU ECONOMIC GROWTH COMPROMISED BY GLOBAL UNCERTAINTIES

According to the Spring 2025 Economic Forecast by the European Commission, the EU economic growth could be weaker than what was expected last autumn. This is largely because of the uncertainty caused by a possibility of abrupt changes in the US trade policy, impacts of which are hard to predict. According to the Spring 2025 Economic forecast, EU real GDP would grow by 1.1% in 2025 (-0.4 p.p./Autumn Forecast), and by 1.5% in 2026 (-0.3 p.p.). Due to the uncertain US trade policy environment, the euro has appreciated against the US dollar, reaching a value of USD 1.15 in June 2025 (USD 1.09 in 2024). This could potentially affect EU international trade in agriculture, as exports become more expensive and imports become cheaper, if the USD devaluation continues.

General inflation in the EU is projected to reach 2.3% in 2025 (-0.1 p.p./ Autumn Forecast) and 1.9% in 2026 (-0.1 p.p.), mainly due to lower energy prices and euro appreciation that offset higher inflation for food and services and assuming no external shocks from global energy markets. The latter cannot be ruled out in view of the tense geopolitical situation in the Middle East region.



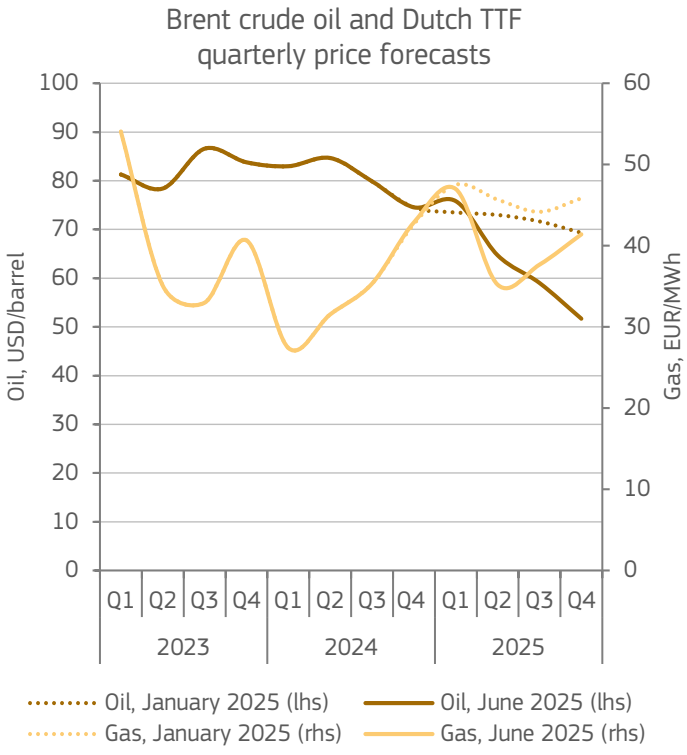
Sources: DG ECFIN Spring 2025 and Autumn 2024 Economic Forecasts.

ENERGY PRICES UNPREDICTABLE DUE TO CONFLICT IN MIDDLE EAST REGION

Compared to earlier forecasts, the outlook for energy prices by S&P Global Commodity Watch has been revised downwards, with oil prices projected towards USD 50/barrel by the end of 2025. This outlook takes into account the possible implications of the unpredictable US trade policy on global demand and an oversupply by OPEC+ producers. However, the recent escalation of the conflict between Israel and Iran has generated a surge of oil prices at around USD 76/barrel in June. Should the conflict affect the traffic of oil and gas tankers over the strait of Hormuz, the impacts on global energy markets could be more significant.

Regarding natural gas prices, S&P projections for the Dutch TTF have been also revised downwards, but prices remain around EUR 40/MWh. They are not expected to return to pre - 2021 levels, hinting that natural gas is no longer expected to be as affordable as in the past.

Industrial electricity and gas price differentials between the EU and its trading partners remained higher in 2024 than pre - 2022 levels, with natural gas being almost three-times more expensive than in the US, even if 2024 saw some improvements compared to 2023.



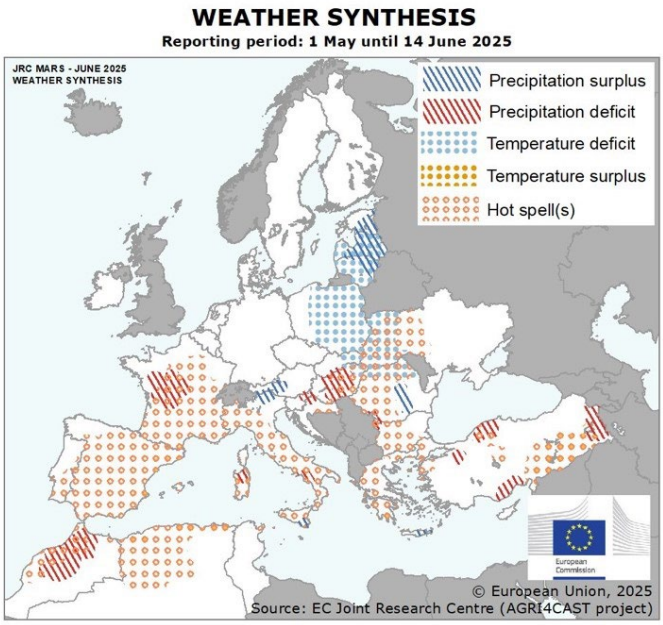
Source: S&P Global - Commodity Price Watch, June and January 2025.

SUPPLY

GOOD WINTER CEREAL YIELDS BUT WATER DEFICIT RAISES CONCERN FOR SUMMER CROPS

According to the latest JRC MARS bulletin, covering the period from 1 May until 14 June 2025, overall good yield prospects are sustained for winter crops in the EU. Exceptionally high yields are forecast in southern EU countries (ES, PT, RO, BG, EL) and in the Baltics, due to favourable weather and high biomass accumulation.

In contrast, summer crops are negatively affected by persistent rainfall deficit in parts of western and central Europe – notably western BE, south-western NL, central FR, eastern DE, western PL, HU, eastern SI, and northernmost HR. In northern IT, above-average spring rainfall has affected winter crops, likely reducing yield outcomes. Pest pressure is monitored in southern and central DE for root crops such as sugar beet.



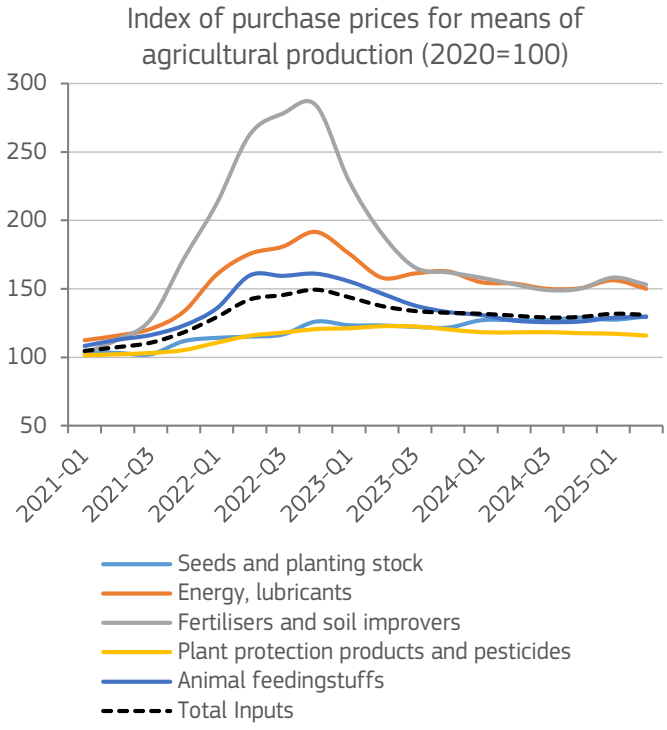
Sources: JRC MARS Bulletin - Crop monitoring in Europe - June 2025.

AGRICULTURAL INPUT STABILITY REMAIN PRECARIOUS AMID GLOBAL TENSIONS

Agricultural input costs slightly rose at the end of 2024 and in early 2025, mainly driven by rising energy and fertiliser prices. Developments in Q2 of 2025 show an overall stabilisation of input costs for farmers, while they remain approximately 30% above the 2020-average. Nonetheless, uncertainty persists due to the tensions in the Middle East region that mainly affect energy and fertilisers prices. These are expected to decline further over the course of the year. Other input such as seeds, animal feed, and materials registered moderate increases of less than 2%. At the same time, prices declined for plant protection products by 1% and for machinery by 0.3%.

Despite global volatility, nitrogen fertilisers in the EU remained well-supplied, largely thanks to a strong surge in imports in early 2025. In Jan-May, the EU imports increased by 24% year-on-year (30% above the 5-year average). This stockpiling could help shield the EU from possible disruptions caused by developments in the Middle East region, which could strain global nitrogen supply chains, particularly for urea.

EU fertiliser production in Q1 of 2025 appears higher than last year, suggesting a gradual and continued recovery. Nitrogen fertiliser prices began rising in June 2025 (+2% compared to the previous month), following the escalation of the conflict in the Middle East region, with the most significant increases seen among North African suppliers, the EU's main external supplier of nitrogen fertilisers.



Source: DG Agriculture and Rural Development, based on MS Eurostat.

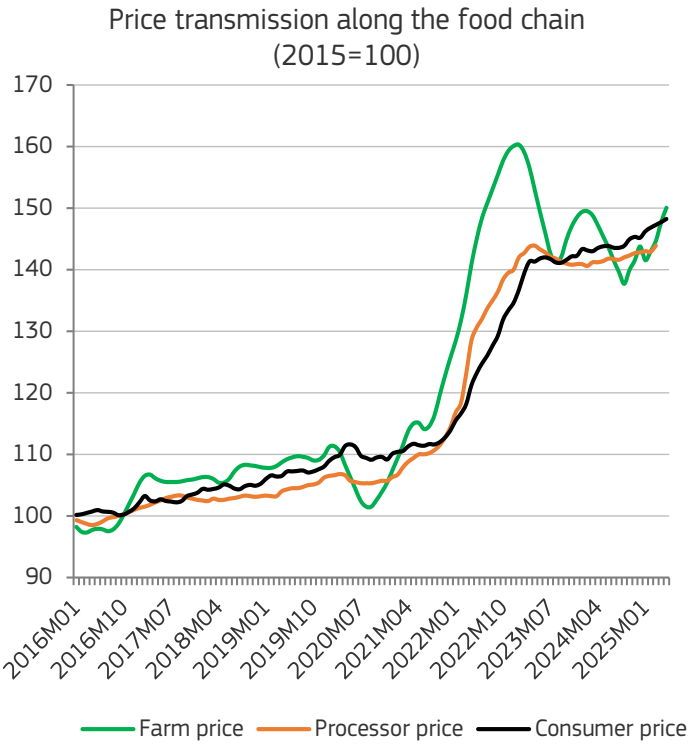
DEMAND

PRICE INDICES ALONG FOOD CHAIN CONTINUE GROWING IN THE EU

Following the record peak in price indices observed in 2023, their evolution has been convergent towards a more stable trend, but with significant differences in volatility, magnitude and with some lagging effects.

The farm price index has shown an oscillating nature, reaching the record level of 160 points in January 2023, before dropping to 141 points in August 2023, increasing again to 150 points in February 2024, dropping to 138 points in September 2024 and finally converging towards 144 points in March 2025. These fluctuating price movements at farm-gate level have not been transmitted towards the rest of the food chain in a similar manner, suggesting that processors and retail sectors are less exposed than farmers to the fluctuations of agricultural commodity spot prices. The processor price index peaked in April 2023 to 144 points, recorded a small decline of prices until February 2024 to 141 points, mainly driven by a decrease in cereal prices, and converged again to 144 points in March 2025.

Finally, the food consumer price index was relatively stable from March to October 2023, then steadily increased towards 147 points in March 2025, hence the decline in farm prices does not return a deflationary pressure on consumers due to asymmetric price transmission effects across the food chain.



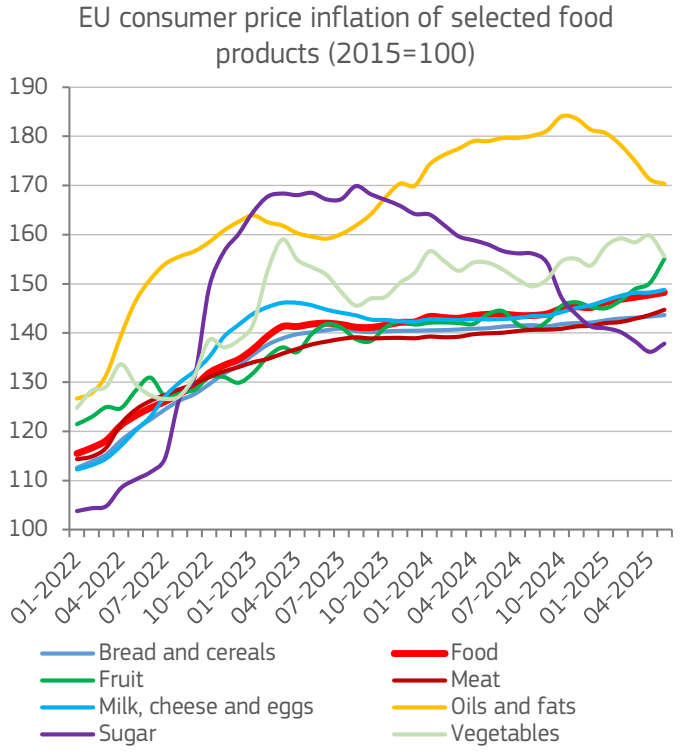
Source: DG Agriculture and Rural Development, based on MS notifications and Eurostat.

FOOD INFLATION OVERALL ON A RISING PATH

Food inflation in the EU is overall on a gradual rising path since August 2024, increasing at a monthly average rate of 0.36%, with prices in May 2025 being 48% higher than 2015 reference levels. Behind this increase, there are important differences at the level of product categories.

Prices for meats, dairy products and eggs follow the same pathway of food inflation, while sugar prices at retail level continue their deflationary trend after the spike seen in 2023. However, in May sugar prices were still 37% above 2015 levels. Notably, oils and fats prices are showing a sign of decrease after two subsequent hikes in 2022 and 2024, dropping from the record level of October 2024. Nevertheless, they are still 70% above 2015-level. Prices for fruits and vegetables exhibit a visible seasonal variability, with prices generally being higher in winter than in summer. At the moment, prices of fruits continue increasing while prices of vegetables are going down.

According to AMECO Spring 2025 projections, inflation for unprocessed food is projected to increase faster in 2025 (by 4%) than for processed food (including alcohol and tobacco, by 3%). In 2026, the inflation for the two product groups is expected to converge around 2%.



Source: DG Agriculture and Rural Development, based on Eurostat.

ARABLE CROPS

KEY MESSAGES

EU cereals production favoured by weather conditions in 2025/26 (4.1% above the 5-year average)

EU exports of cereals increasing (26% year-on-year)

EU oilseeds production to recover in 2025/26 (4% above the 5-year average)

Sugar beet area returns to the 5-year average level of 1.47 million ha

HIGHLIGHTS

In 2025/26 EU production of arable crops is forecast to recover from a negative marketing year in 2024/25.

The EU cereals production is forecast to increase by almost 11% year-on-year, mainly due to overall favourable weather conditions and an increased cultivated area. This would allow the EU to benefit from the expected rebound in global wheat trade, leading to higher EU cereal exports (+26% year-on-year) while imports remain 12% below the 5-year average. Domestic demand would remain almost stable.

The EU oilseeds production in 2025/26 is forecast to recover as well, driven by rapeseed (+13 % year-on-year) and sunflower seeds (+14 % year-on-year). EU production of oilseed meals is expected 1% above the 5-year average, driven by sunflower and rapeseed meals. EU production of vegetable oils is forecast 2% above the 5-year average, with a domestic consumption keeping a declining trend driven by declining palm oil consumption. The 2025/26 EU protein crops production is forecast at 4.8 million t (- 9% year-on-year, + 4% above the 5-year average), driven by field peas and broad beans.

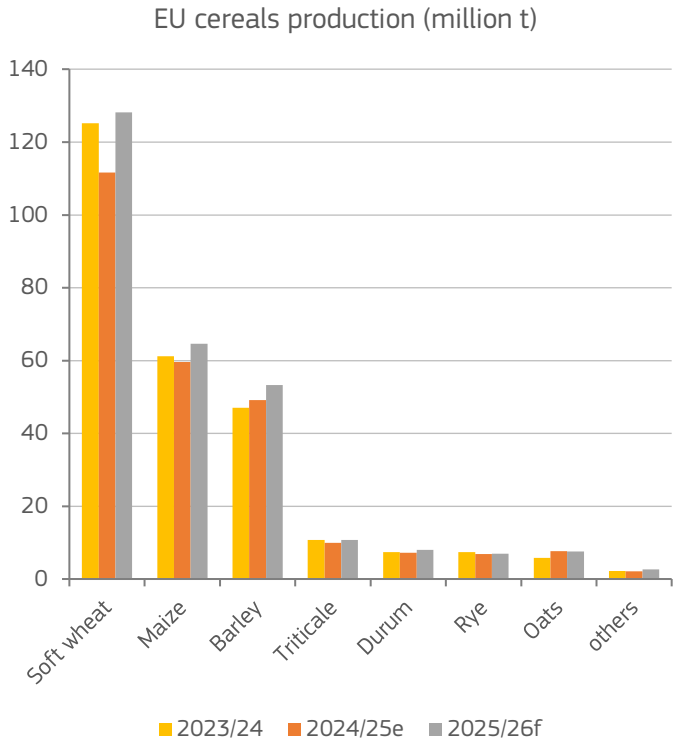
The 2025/26 EU sugar production is forecast at 15.2 million t, down 1.4 million t from 2024/25. This decline is driven by a decrease in area, in turn driven by the end of the record high sugar prices seen in 2023 and 2024. Sugar exports are expected to drop to 1.0 million t, while imports are forecast to increase to 1.4 million t from the record low level of the 2024/25 season. Consumption and stocks are forecast to be in line with the outgoing season.

CEREALS

POSITIVE WEATHER PROSPECTS SUPPORT THE EU PRODUCTION

The 2025/26 EU cereals gross production is estimated 4.1% above the 5-year average (at 285.4 million t). This shows a production recovery from the previous marketing year which was 4% below the 5-year average (at 257.4 million t), mainly due to unfavourable weather conditions which affected yields and crop areas. In 2025/26, good weather conditions for winter crops are observed so far in central and northern EU (DE, PL, DK, SE, LT) as well as the Iberian Peninsula (ES and PT), with particularly favourable conditions in some eastern EU countries (RO, BG). However, persistent drought in areas such as BE and FR impacts spring and summer crops, while excessive rain affects winter crops in IT.

Against this backdrop, EU cereals area is forecast to increase by 2.4% in 2025/26 although remaining 2% below the 5-year average, driven by soft wheat and durum wheat (+5% and +4% year-on-year, respectively), while maize, barley and oats areas decrease slightly (- 1.3%, - 0.5% and - 0.8% year-on-year, respectively). At the same time, yield improvements are forecast for all cereals, in particular soft wheat, barley and maize (about 5.6%, 6.3% and 4% above the 5-year average, respectively). As a result of the combination of both area and yields, EU soft wheat gross production is forecast at 129.2 million t (4.2% above the 5-year average), maize at 64.9 million t (3% above the 5-year average), and barley at 53.7 million t (5.1% above the 5-year average).



Source: DG Agriculture and Rural Development, based on Eurostat, MS notifications and JRC MARS data.

IMPROVED TRADE BALANCE AND STABLE EU CONSUMPTION

The world market outlook for 2025/26 depicts a rebound in wheat trade driven by rising global production and demand from Asia (esp. China and Türkiye), while global maize trade is expected to see minimal growth due to low import demand.

In 2025/26, the expected increased domestic production could result in an improved EU cereals trade balance. The exports are expected to increase by about 26% year-on-year, (1.8% below the 5-year average). The imports are expected to decline by about 19% year-on-year (12% below the 5-year average), as the improved EU domestic production could fulfil a larger share of the domestic demand. By contrast, the 2024/25 EU cereals imports are to be about 17% above the 5-year average due to the lower domestic production.

In 2025/26, domestic demand is not expected to change substantially from the previous year (+0.3% year-on-year). Animal feed, the main outlet for domestic production, is expected to remain broadly stable (0.3% above the 5-year average), reflecting a rather stagnating EU animal production (except for poultry meat production). The use of cereals for industrial purposes is also expected to remain stable (1.2% above the 5-year average).

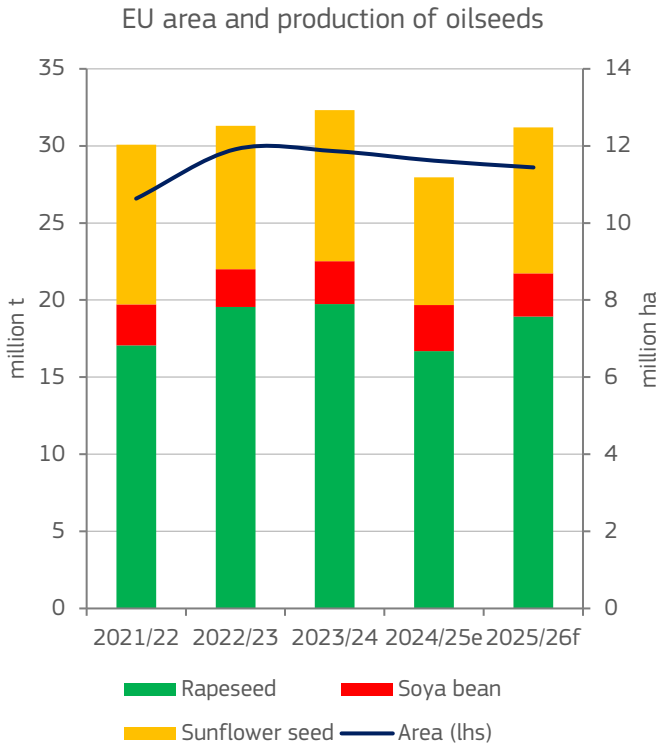
Source: DG Agriculture and Rural Development, based on Eurostat.

OILSEEDS AND PROTEIN CROPS

RECOVERY OF THE EU OILSEEDS PRODUCTION

The 2025/26 EU oilseeds production is forecast almost 12% higher year-on-year (4% above the 5-year average), at 31.2 million t. This followed a season in which production was 7% below the 5-year average, primarily due to adverse weather conditions that negatively impacted yields. The recovery is driven by rapeseed (+ 13 % year-on-year) and sunflower seed (+ 14 %), while soybean seed production is forecast to decline by 6%, although remaining 4% above the 5-year average. 2025/26 oilseeds area is expected to decline by about 1.5%, in particular sunflower and soybean seeds (- 6% and - 12% respectively). The declining area is compensated by improving yields thanks to suitable weather conditions.

EU protein crops production is forecast at 4.8 million t in 2025/26 (- 9% year-on-year, but 4% above the 5-year average), after a strong production increase in the previous marketing year (18% above the 5-year average). The production decline is expected to be driven by field peas (- 4% year-on-year) and broad beans (-5%). In 2025/26, EU protein crops imports remain 3% below the 5-year average, while exports decline 2% below the 5-year average.



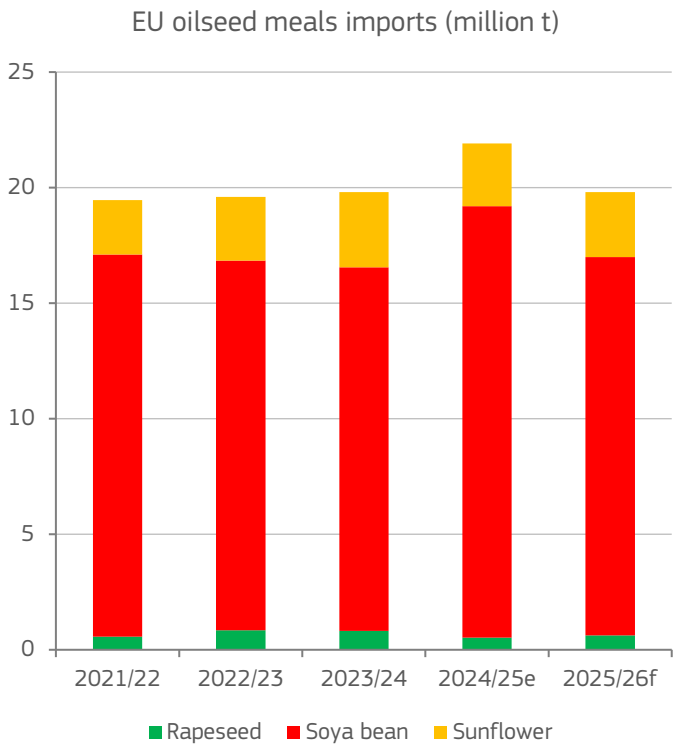
Source: DG Agriculture and Rural Development, based on Eurostat, MS notifications and JRC MARS data.

LOWER IMPORTS OF OILSEED MEALS AND OILS

In 2025/26, the global oilseed production is expected to reach 692 million t (+ 2% year-on-year), driven by a recovery of sunflower seed production after a weak 2024/25, with notable expansions in the Black Sea region.

The 2025/26 EU production of oilseed meals is expected to reach 29.9 million t (+4% year-on-year), in line with the increase of seeds production (+20% in sunflower meal production and +4% in rapeseed meal production). Soybean meal production is expected to remain quite stable at 11.5 million t (- 1% year-on-year, 1% above the 5-year average).

The 2025/26 EU production of vegetable oils is forecast at 16.3 million t (around + 6% year-on-year and 2% above the 5-year average). EU consumption of vegetable oils keeps following a declining trend (12% below the 5-year average) as use of palm oil (representing 12% of total vegetable oil use) continues its downward trend. The 2025/26 EU imports of vegetable oils are expected to decline (- 6% year-on-year) due to the anticipated reduction of palm oil imports and the higher domestic production of oilseeds. EU exports are forecast to remain in line with the 5-year average at about 2.6 million t in 2025/26.



Source: DG Agriculture and Rural Development, based on Eurostat.

SUGAR

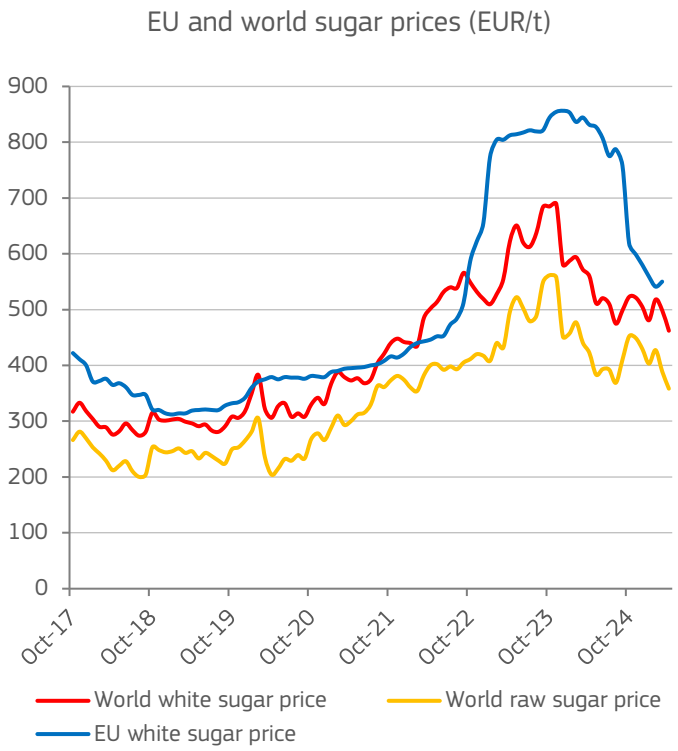
DECREASING PRICES SUPPORT EU USE AND EXPORTS IN 2024/25

The 2024/25 EU white sugar production is estimated 6.5% above 2023/24 season (at 16.6 million t). This is mainly due to an increase in sugar beet plantings spurred by record sugar prices during the sowing period. Half of this increase is attributed to DE, with PL and FR also showing strong gains.

EU human sugar consumption is expected to slightly rise, with lower prices temporarily reversing the general downward trend in consumption. This could also be a driver for a recovery in industrial use, which dropped sharply in 2023/24. Sugar use for processed products destined for exports, also remains strong.

Due to an increase in production, a relatively stable consumption in the EU, and a changed trade regime with Ukraine, EU sugar imports are estimated to decline by over 50% in 2024/25, to a record low of 0.7 million t. Exports, on the other hand, are expected to be much stronger than in the recent past (+87% over 5-year average) at 1.7 million t. Despite generally lower world prices compared to the EU, high domestic supply prompted sugar producers to seek alternative outlets on the world market.

As a result, ending stocks are expected to decline only slightly in 2024/25, to 2.0 million t.



Source: DG Agriculture and Rural Development, based on MS notifications; LIFFE, BCE.

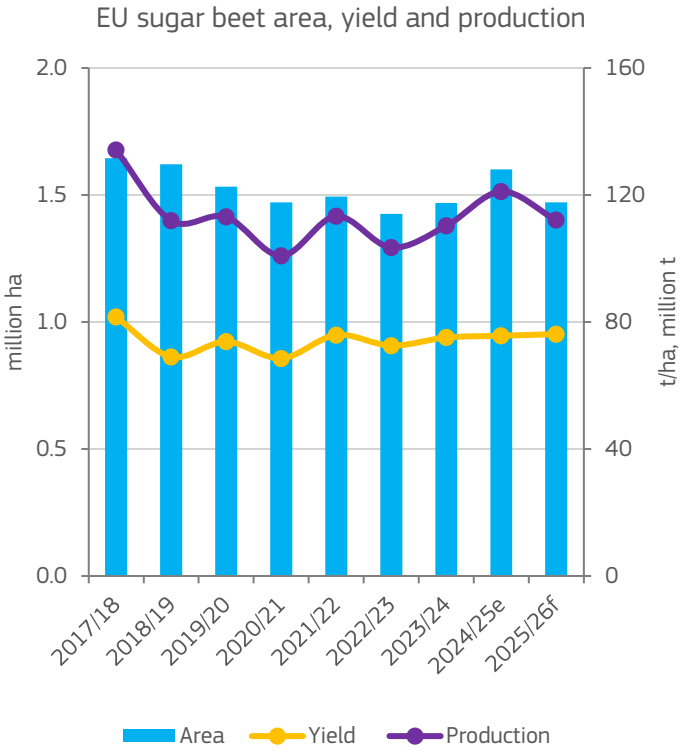
2025/26 PRODUCTION TO DECLINE DUE TO LOWER SUGAR BEET AREA

Due to the reduction of sugar prices from record levels, EU total sugar beet area in 2025/26 is expected to decline (- 8.2%) but remains in line with the 5-year average of 1.47 million ha. Decline in area affects most of the main producers (-4.6% FR, -6.6% DE, and -6.8% PL). On the other hand, sugar beet yields are expected at the level of previous season and slightly above the 5-year average. Sugar content is also assumed to be at the level of the latest 5-year average.

The 2025/26 EU white sugar production is therefore forecast at 15.2 million t (8% below 2024/25 and 2% below 5-year average). Among the largest EU sugar producing countries, the sharpest annual reduction is forecast in DE (-14%), while only NL is forecast to increase production (+2%) where a recovery of yields could offset the decline in area.

As a result of expected lower EU production, EU sugar imports could double and reach 1.4 million t. As a knock-on effect from decreased domestic production, EU exports of white sugar are forecast to decrease by 40% to 1.0 million t in 2025/26.

Supported by lower prices, total domestic use of sugar is estimated to only decrease slightly (-0.4%). Ending stocks of sugar are also expected to remain stable at 2.0 million t at the end of 2025/26.



Source: DG Agriculture and Rural Development, based on Eurostat.

SPECIALISED CROPS

KEY MESSAGES

Surge in 2024/25 EU olive oil production (+37% year-on-year) leads to lower prices

Insecure trade landscape could push EU wine exports down (-6% year-on-year)

Lower EU production of tomatoes in 2025 (-2.6% year-on-year)

EU production of peaches and nectarines and apples to decline due to adverse weather (-5.8% / -4%)

Climatic conditions favouring an increase in the EU production of oranges in 2024/25 (+5%)

HIGHLIGHTS

In 2024/25, EU olive oil prices have significantly decreased, primarily due to a surge in EU olive oil production, which increased by 37% year-on-year. This increase was largely driven by a substantial recovery in ES, though IT had reduced yields' year. The increased availability should boost EU exports by 25%. Imports from Tunisia are also set to increase. The EU consumption is expected to rise to the 5-year average, with ending stocks at a healthy level.

Despite the recovery in IT, EU wine production is expected to decline further in 2024/25 (-5%), due to the low output in FR, followed by a declining trend for EU wine consumption (-3%). In a context of insecure trade landscape, exports are expected to fall again (-6%), while imports could remai stable..

In 2025, EU tomato production is projected to decline by 2.6% due to a drop in processing tomatoes, while fresh tomato production remains stable, with consumption patterns shifting towards cherry and specialty varieties.

EU production of peaches and nectarines is expected to decline by 5.8% to due to reduced area and yields, particularly affecting EL.

In 2024/25, EU apples production is estimated to have decreased by 4% due to adverse weather, yet fresh apple consumption remains stable. With stable fresh apple exports and sharp increase in processed apples, EU apple trade is expected to be in balance.

EU production of oranges is set to increase by 4.6% due to improved climatic conditions, with gains in ES and PT. This could be mainly directed towards the processing.

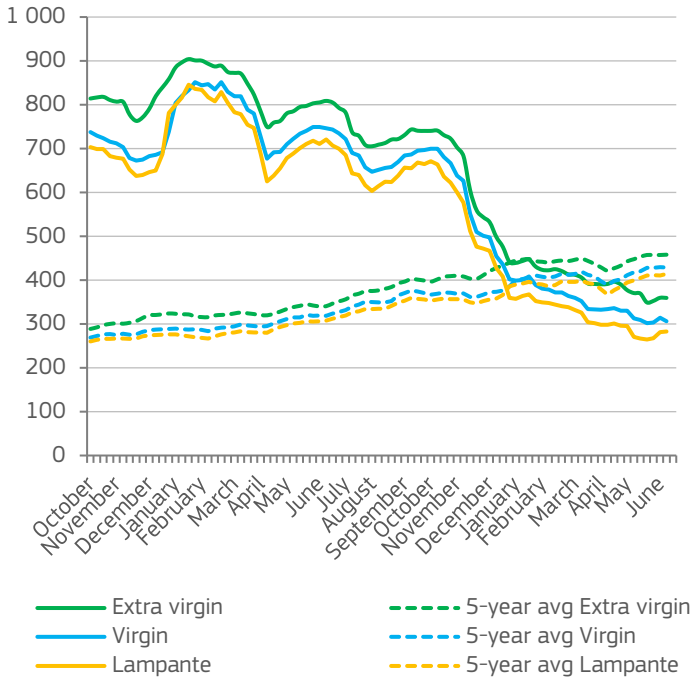
OLIVE OIL

PRICES DECLINE FROM HISTORIC PEAK AFTER AMPLE EU PRODUCTION IN 2024/25

After reaching unprecedented highs in the 2023/24 season following two campaigns with historically low production, olive oil prices have decreased significantly since the start of the 2024/25 season. Prices peaked in January 2024, with Extra virgin oil hitting EUR 903/100 kg in ES, but halved by January 2025 and continued to decline, reaching EUR 350/100 kg in June 2025. Moreover, olive oil prices in ES in 2025 have dropped below the 5-year average.

These price developments are mainly the result of increased EU olive oil production in 2024/25, which is now estimated at 2.1 million t, representing an increase of 37% year-on-year or 15% over the 5-year average. Most of this growth is thanks to a sharp rebound in olive oil production in ES, EU's main producer of olive oil, which is estimated at 1.4 million t (+66% year-on-year). Production in EL is also expected to increase substantially (+43%) and to a lesser extent in PT (+10%). IT, on the other hand, experienced an "off-year" in 2024/25, which resulted in an estimated 25% year-on-year reduction in olive oil production and prevented local olive oil prices to return to historic averages.

Producer prices of olive oil by categories in Spain in 2023/24 and 2024/25 (EUR/100 kg)



Source: DG Agriculture and Rural Development, based on MS notifications.

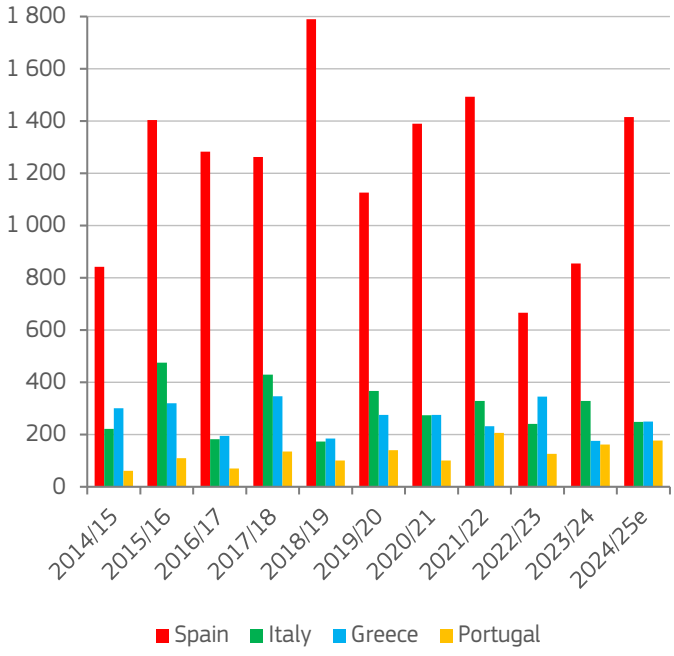
EXPORTS REBOUND THANKS TO INCREASE IN AVAILABILITY AND COMPETITIVENESS

Increased olive oil availability and lower prices in the EU have also affected trade flows. An increase in the shipments to the US was observed in recent months, with apparent frontloading of shipments given the unpredictability of US trade policy. Also exports to Canada, Australia and China have been going strong. Therefore, EU exports in 2024/25 are expected to rebound strongly after several low seasons, growing 25% year-on-year to 0.76 million t. EU imports of olive oil are expected to grow 15% year-on-year to 0.24 million t. Even though import demand from most suppliers decreased with an increase in the EU production, imports from Tunisia, the main supplier of olive oil to the EU, are expected to grow to cover the deficit left by lower than usual production in IT.

Thanks to positive price developments, the EU consumption of olive oil is also expected to increase – especially in the main EU producing countries – and return to the average level of the past 5 years of around 1.4 million t. Ending stocks of the 2024/25 season are expected to be at a healthy level of 0.45 million t.

The initially favourable prospects of 2025/26 EU olive oil production, which will start in October, might be hampered due to recently observed hot weather in ES and PT.

Olive oil production in main EU producing countries (1 000 t)



Source: DG Agriculture and Rural Development, based on MS notifications.

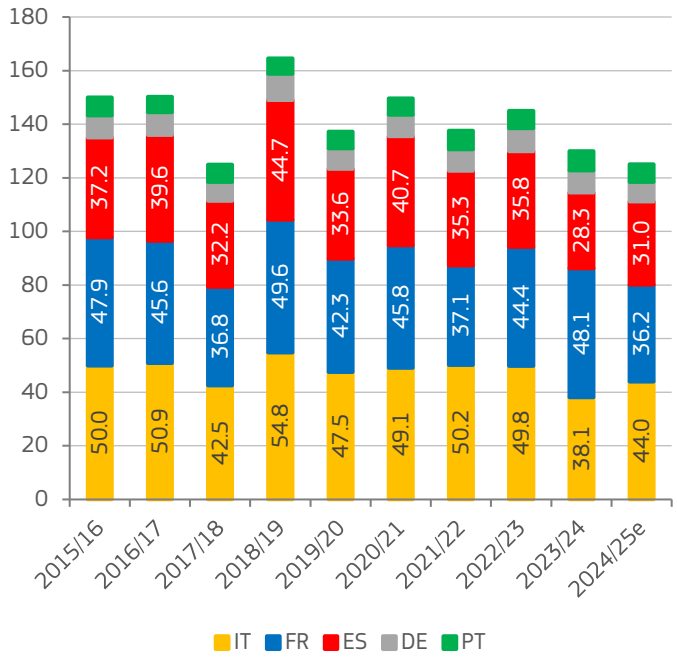
WINE

EU WINE PRODUCTION DECLINES FURTHER

Based on the latest MS notifications, 2024/25 EU wine production is expected to decline further (-5% year-on-year, 10% below the 5-year average) to 137 million hl, the lowest production figure in the past 20 years. This is mainly due to drops in FR (-25%) and DE (-11%) and PT (-8%), which are not compensated by a production increase in IT (+15%) and ES (+10%). It will be IT that will take over as the leading EU wine producer in 2024/25. In FR and DE, the production drop is a result of both unprecedentedly humid autumn which caused fungal diseases, hail and frost during spring 2024. As a reaction to changing supply, the EU wine producer prices slightly increased in nominal terms in the second half of 2024, with moderate to partial recovery in ES and IT, stabilizing prices in DE and strong increases in FR. In Jan-May, EU wine producer prices remained overall stable, with price increases for ES and partial recovery for DE while FR producer prices dropped.

In 2024/25, the EU wine consumption is expected to decrease further by 3%, to 93 million hl, particularly for red wines, due to a long-term declining trend, and a more general trend towards a lower consumption of wine and/or a substitution with other products. The 'other uses' could decline to their usual levels, as the crisis distillation measures were in place only in two EU countries.

EU wine production in main producing countries (million hl)



Source: DG Agriculture and Rural Development, based on MS notifications.

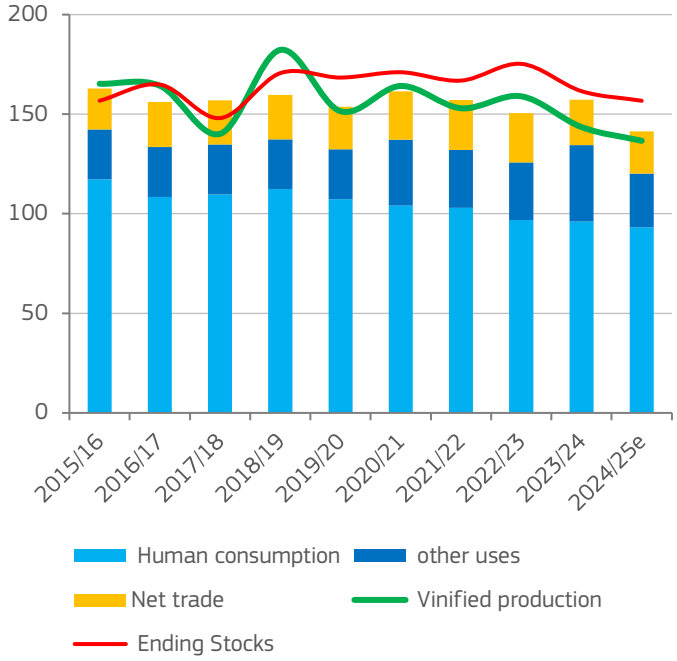
WINE EXPORTS SUFFERING FROM UNSTABLE TRADE ENVIRONMENT

In Aug-Apr, EU wine exports fell by 3% (to 21million hl), mainly driven by a drop of shipments to the UK of PGI wines. On the other hand, towards the end of 2024, EU wine exports peaked to the US, in an anticipation of potential US tariffs. Given the uncertainty of further evolution and sustainability of this trend, EU exports are expected to fall by 6% in 2024/25.

In a context of reduced domestic production and ongoing negative demand trend, stable EU imports are expected. 2024/25 ending stocks are expected to be below the 5-year average (157 million hl). The more favourable weather conditions in Spring 2025 for wine producing countries could stimulate an upswing in domestic production for season 2025/26.

Until now, no major event has threatened 2025/26 EU wine production except for some localized impacts in certain regions.

EU wine production, consumption, net trade and ending stocks (million hl)



Source: DG Agriculture and Rural Development, based on MS notifications and Eurostat.

APPLES

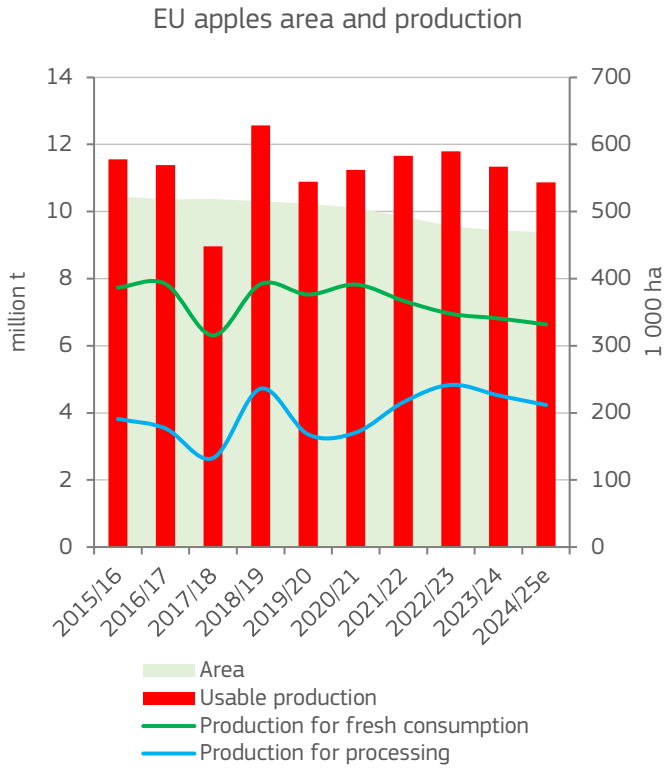
EU CONSUMPTION OF FRESH APPLES HOLDS UP

The 2024/25 EU production of apples is estimated to decrease by 4% to 10.9 million t (-5% compared to the 5-year average) and to reach the lowest level since 2017/18. The decline is due to adverse weather conditions, notably in PL (-13% year-on-year), which accounts for around one third of total EU production. Other countries also experienced significant production declines with CZ (-63%) being the most affected.

Due to the general decrease in availability, and fresh consumption relatively stable at 6.7 million t (-3% year-on-year), less apples are directed to processing. As a result, the EU apple production for processing is experiencing a higher decline. In total, 4.2 million t of apples are expected to go for processing (-6% year-on-year).

The lower availability keeps the EU producer prices high; however seasonality is expected to play a positive role in the demand. Regarding fresh apples, apparent EU per capita consumption is expected to remain stable at 13.4 kg, (+1% year-on-year), while per capita consumption of processed apples is expected to increase stronger (+8%) to 10.8 kg.

As a result of lower production and stable consumption, stocks of fresh apples are expected to be almost fully used by the end of the 2024/25, dropping to around 0.3 million t.



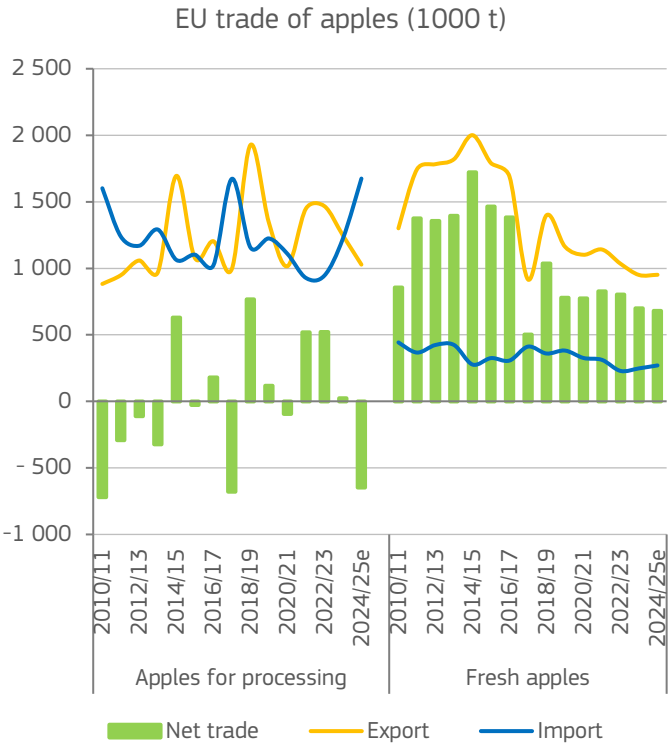
Source: DG Agriculture and Rural Development, based on Eurostat.

IMPORTS OF PROCESSED APPLES MATCH EXPORTS OF FRESH APPLES

EU exports of fresh apples are expected to remain stable in 2024/25, but significantly below the 5-year average (-13%). Driven by the decline of production, imports of fresh apples are expected to increase by 9%. Nevertheless, they would remain relatively small (270 000 t) and below the 5-year average (-8.5%).

Due to sizeable decline in availability for processing, EU exports of processed apples are estimated to decline sharply by 18% (-24% compared to the 5-year average). On the other hand, imports of processed apples are expected to increase significantly (+37% year-on-year, 53% above 5-year average.

As a result of these developments, EU net exports of fresh apples are expected to decline slightly to 680 000 t. At the same time, trade in processed apples is expected to go from small net export position in 2023/24 to a substantial net import of 650 000 t in 2024/25. Therefore, EU trade in apples in 2024/25 could be almost in balance for the first time since 2017/18.



Source: DG Agriculture and Rural Development, based on Eurostat.

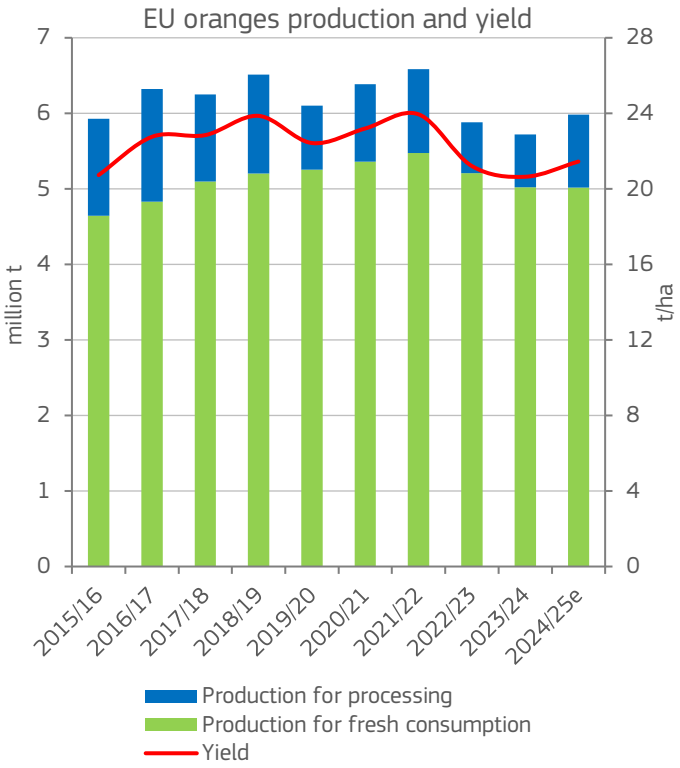
ORANGES

IMPROVING WEATHER CONDITIONS LEAD TO HIGHER PRODUCTION

The 2024/25 EU production of oranges rebounded from the record lows of the previous season. It is 4.6% higher but still 2.3% below the 5-year average. This increase is due to an expected 10% production increase in ES, and 24% in PT, both accounting for around 56% of the EU production. This is driven by favourable weather conditions, mainly through improved precipitation. The overall increase can be attributed to higher yields (+3.9% year-on-year) while change in area is lower (+0.7%).

The EU production of oranges for fresh consumption is expected to be unchanged in 2024/25 (but 5% below the 5 - year average). Therefore, all expected growth is likely to be directed towards processing. This could mean a recovery from historically low levels of the last two seasons, and partially compensate for the sharp decrease in imports.

Apparent EU per capita consumption of fresh oranges is expected to be relatively stable at 12.4 kg (-1.2%), but 5% below the 5-year average. On the other hand, despite an increased availability for processing, the EU per capita consumption of oranges for processing is expected to drop significantly (-25%) to 3.7kg. This is also because consumers look for cheaper alternatives to orange juice.



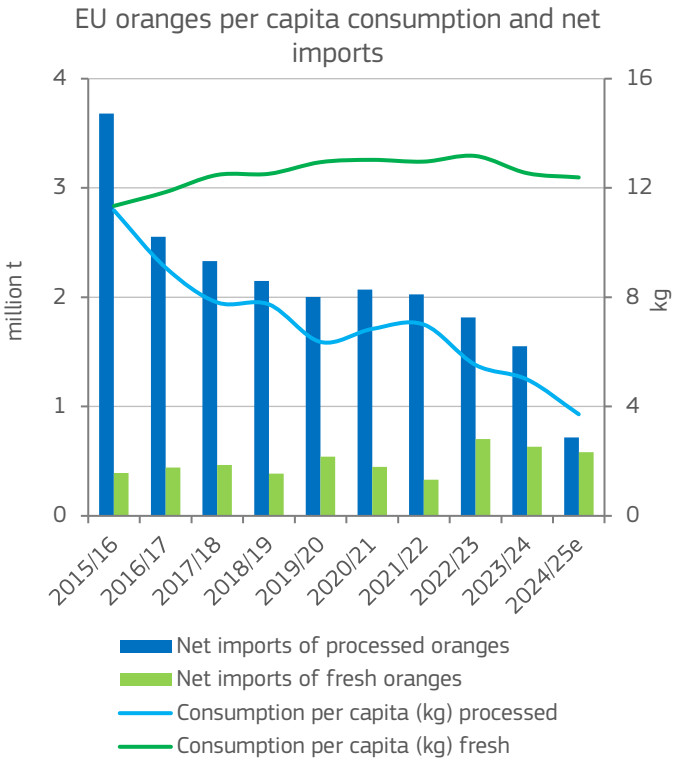
Source: DG Agriculture and Rural Development, based on Eurostat.

IMPORTS OF PROCESSED ORANGES RECORD LOW

EU imports of oranges in processed products (mainly juices) have been declining since 2014/15, mirroring a declining consumption trend, which is likely to continue in 2024/25. Moreover, the decline is expected to accelerate, putting imports down 36% in 2024/25 (48% below the 5-year average).

EU exports of oranges in processed products are also expected to decline, albeit at a slower rate (10% year-on-year, 24% below the 5-year average). If materialized, the volume of just under 1 million t would be the lowest recorded in the last 25 years.

Regarding fresh oranges, EU trade is expected to be more stable in 2024/25. Imports are expected to decline by 3.6%, (only 1.4% below the 5-year average). On the other hand, exports could grow by 5.2%, after several years of declines. However, the total fresh export volume would still be 16% below the 5-year average.



Source: DG Agriculture and Rural Development, based on Eurostat.

PEACHES AND NECTARINES

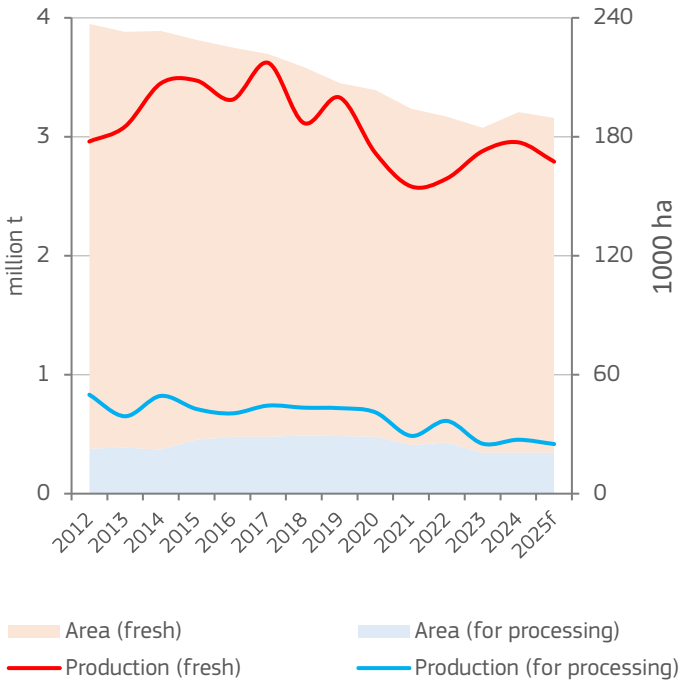
LOWER AREA AND REDUCED YIELDS DRIVING EU PRODUCTION DOWN

In 2025, the EU production of peaches and nectarines (P&N) is expected to moderately decline by 5.8% to 3.2 million t. This reduction is largely driven by EL, which has been notably impacted by adverse weather conditions. However, while volumes have diminished, the quality of taste and texture of the fruit is likely to remain high.

The decline in production – a combined effect of lower area and reduced yields – is expected to affect both P&N for fresh consumption (-5.5%) and for processing (-8.0%), with the latter more affected due to new fruit disease issues in EL, the largest EU producer of P&N for processing.

Generally, the EU production is experiencing the effects of climate change, with milder winters. As a result, fruit trees do not accumulate enough chill hours which are vital for their growth and fruit production. Other factors include new diseases, labour shortage, hydric conditions as well as anomalous rainfall patterns.

EU peaches and nectarines area and production



Source: DG Agriculture and Rural Development, based on Eurostat.

EU IMPORTS OF FRESH PEACHED AND NECTARINES TO HIT A NEW RECORD

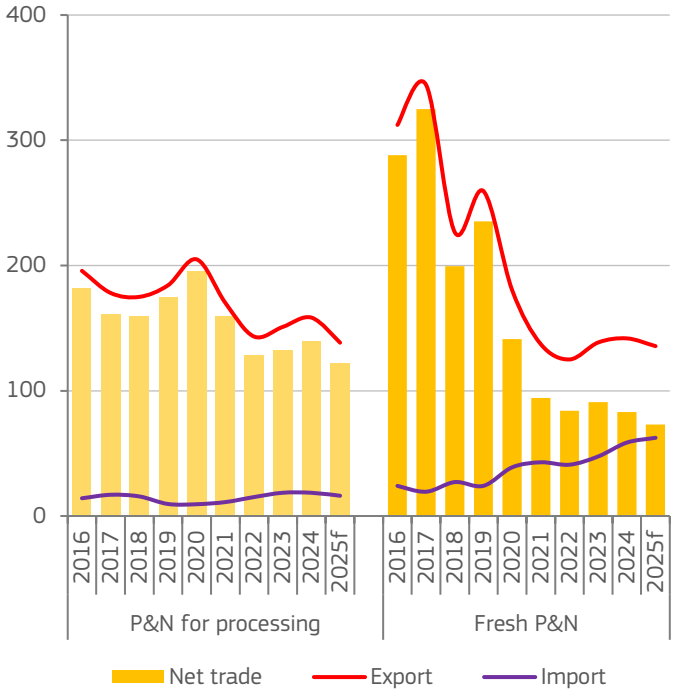
The EU demand for fresh P&N is expected to decline, along with a lower production. Nevertheless, the quality of the fruit should serve as a key factor in sustaining consumer interest and preference. Another key factor is the summer weather as consumption of P&N is positively linked to warm and sunny weather conditions.

In terms of apparent per capita consumption, fresh peaches and nectarines are projected to remain close to the 5-year average (6.0 kg). At the same time per capita consumption of P&N for processing is expected at 0.7 kg per capita, in line with the recent declining trend.

Counter-seasonal imports from regions such as Chile and South Africa could play a significant role in maintaining supply levels, and ensuring the availability of these products to consumers. EU imports could grow to reach a new record of 62 000 t.

EU exports of fresh P&N are forecast to fall by 4.4%, a change primarily attributed to lower yields and delays at the start of the harvest season. For trade in processed P&N, both exports and imports are forecast to decline by about 13%. These reductions reflect broader market adjustments in response to decreased processing capacities and evolving consumer demand.

EU trade of peaches and nectarines (1000 t)



Source: DG Agriculture and Rural Development, based on Eurostat.

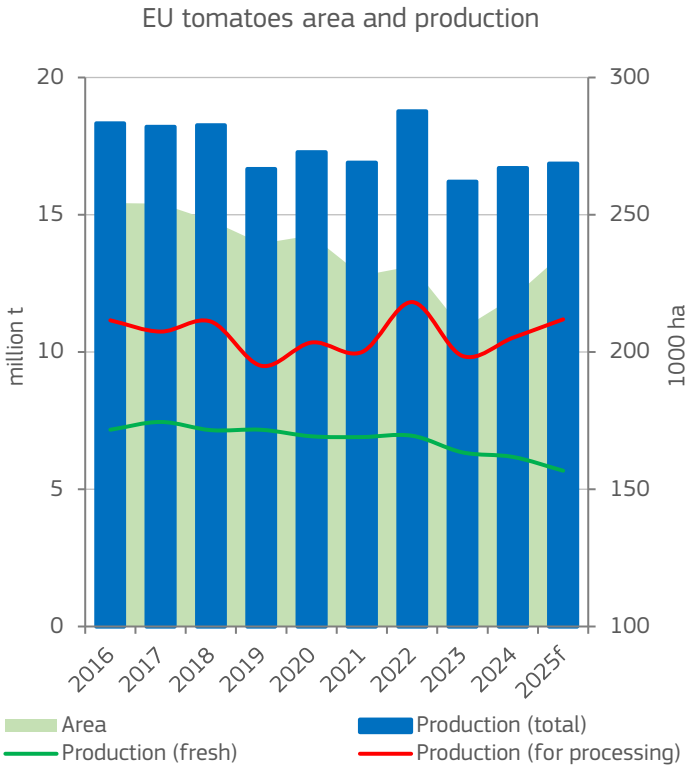
TOMATOES

RESILIENT FRESH EU TOMATO PRODUCTION WHILE PRODUCTION FOR PROCESSING DECLINES

The 2025 EU total production of tomatoes is expected to decrease by 2.6% to 16.4 million t (-2.4% compared to 5-year average). This is driven by decline of tomatoes for processing (around 66% of total production), which is expected to drop by 3.7% to 10.8 million t, mainly in ES and PT, as most growers face lower producer prices while costs remain high.

The EU production of tomatoes for fresh consumption of about 5.6 million t could remain largely unchanged, but still 12.8% below 5-year average. Winter production of fresh tomatoes increased in NL thanks to lower energy costs and investments in greenhouses, while summer production is expected to decline slightly for most EU producing countries. Prices of fresh tomatoes are expected to remain stable.

Driven by lower supply of tomatoes for processing, apparent per capita consumption could drop to 20.5 kg (-6.7% year-on-year, and 2.3% above 5-year average). EU consumption of fresh tomatoes per capita is expected to be stable (13.6 kg) but 11% below the 5-year average. Cherry tomatoes are expected to continue their increasing consumption trend, due to better tasting and colourful varieties. This trend is also supported by innovations in packaging and sustainability, as well as increasing consumer demand for such products.



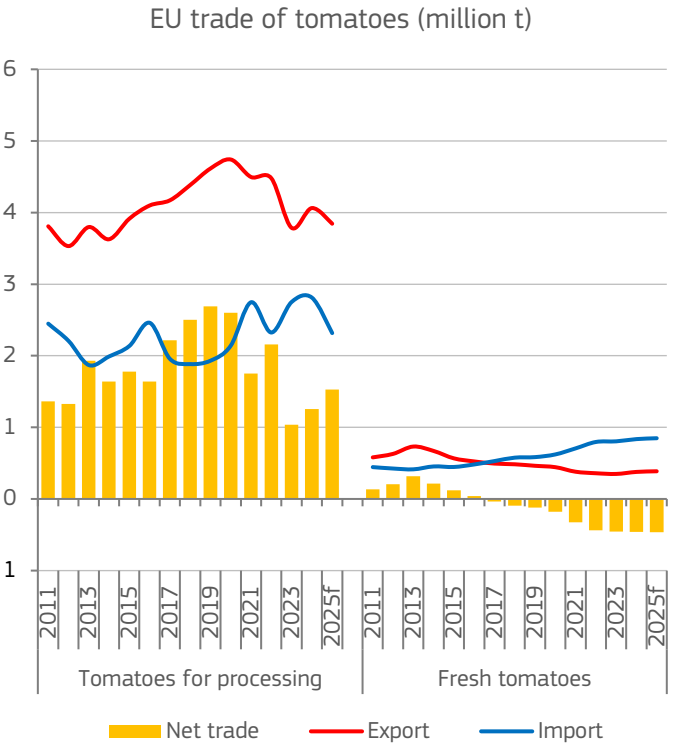
Source: DG Agriculture and Rural Development, based on Eurostat.

EXPORTS OF FRESH TOMATOES CONTINUE GROWING

In 2025, EU imports of fresh tomatoes are expected to continue increasing and reach 847 000 t (10% above the 5-year average). Morocco remains the main source of imports, with an expected share of 70%, and is now increasing also the share of high value varieties like cherry tomatoes. Most of the remaining imports are expected to come from Türkiye (25% of total).

EU exports of fresh tomatoes, which in 2024 increased for the first time in ten years, are expected to increase again in 2025 to 384 000 t (+2.4% year-on-year) thanks to the increase in shipments to the UK (the largest EU export market).

The EU is expected to maintain a trade surplus in processed tomato products, with imports of low-value (tomato paste) and exports of high-value items, like peeled tomatoes. Nevertheless, both exports and imports are expected to decline in 2025. EU exports of tomatoes in processed products are expected to decline by 5% 2025 and reach 3.9 million t in fresh product equivalent, while for imports the decline could reach 18% to 2.3 million t.



Source: DG Agriculture and Rural Development, based on Eurostat.

MILK AND DAIRY PRODUCTS

KEY MESSAGES

Stable demand in retail and food processing supports EU dairy prices

More milk still channelled to cheese and whey production (+0.7% year-on-year)

EU dairy exports could remain stable despite unfavourable global market conditions

HIGHLIGHTS

EU raw milk prices continue to be well above the 5-year average, reflecting stable demand in retail and food processing, despite somewhat increasing food inflation. Due to favourable weather conditions in most EU countries in the first half of the year, the availability and quality of grassland and fodder is expected to be above average, potentially easing the pressure on the margins for farmers from the feed costs. With an increase in both milk solids content (+0.2% for milk fat and +0.1% for milk protein) and EU milk yields (+1.2%), EU milk supply is set to increase slightly in 2025 (+0.15% not corrected for the leap year in 2024), despite the continuing decline in the dairy herd (-1%).

EU dairy markets continue to be characterized by tight milk fat supply and strong domestic demand for dairy products, which supports a forecast for higher EU raw milk prices. Larger shares of the milk solids are channelled to cheese and whey production, which is expected to further increase in 2025 (+0.7% for both). At the same time, EU butter production is expected to remain stable (+0.3%). Skimmed milk powder and whole milk powder production is forecast to continue the declining trend (-1% and -1.7%), impacted by unfavourable global market conditions.

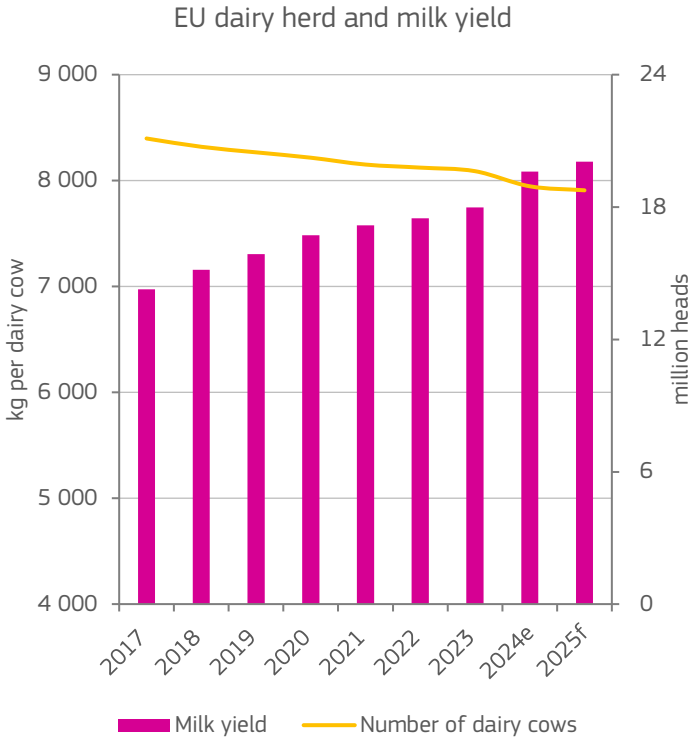
Total EU dairy exports can remain stable in volume in 2025 (-0.2% in milk equivalent), following a 1% decline in 2024. While butter, skimmed milk powder and whole milk powder exports are forecast to decline (-2%, -2% and -5% year-on-year, respectively), EU cheese exports remain stable compared to strong cheese exports in 2024. On the other hand, whey powder and fresh dairy products exports can increase (+2% and +3%, respectively).

MILK

STEADY MILK SUPPLY AND MILK SOLIDS AVAILABILITY IN 2025

EU milk deliveries are expected to remain stable in 2025 (+0.15% year-on-year, without adjusting for the leap year in 2024). The development of the EU dairy herd could further continue its declining trend. After the significant decline in 2024 (-3.5%), the number of dairy cows could decline by additional 1%. On the other hand, the increase in milk yields (+1.2%) combined with slightly improving milk fat and milk protein content (+0.2% and +0.1% respectively) could counterbalance this decline, leading to an overall stable milk solids availability for processing. Milk fat content is estimated to increase relatively more, supported by strong EU demand for milk fat and by positive prospects for grassland availability and quality in most EU countries.

The weather conditions for the grassland biomass accumulation have been rather favourable in early 2025. While some areas of concern have been identified in the latest JRC MARS bulletin (e.g. rainfall deficit in southern FR and in some central EU regions), the growth outlook for grassland remains positive and above average in most of the EU. Therefore, the availability and quality of grass feed is expected to be at least average in 2025 in most EU countries, supporting a stable outlook for EU milk production and milk solids availability overall.

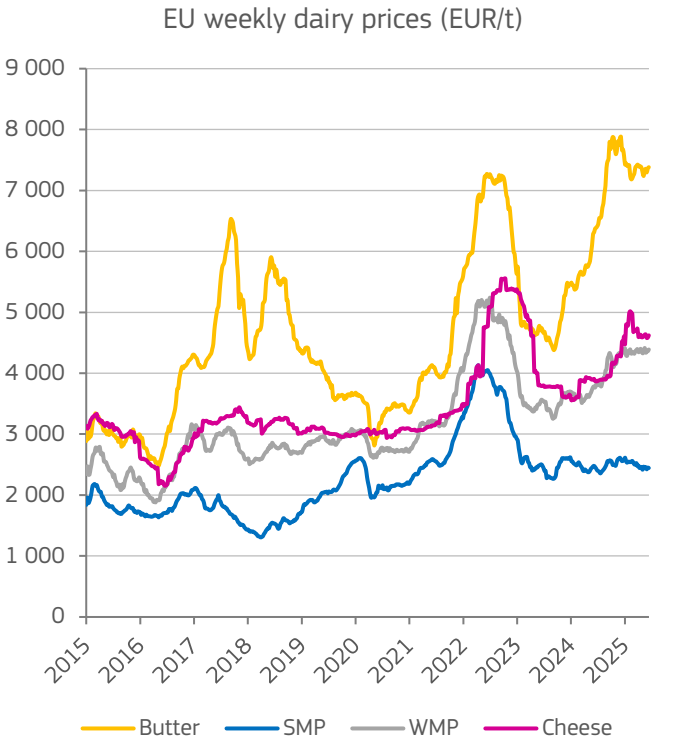


Source: DG Agriculture and Rural Development, based on Eurostat.

REGIONAL DIFFERENCES AND UNCERTAINTY OVER IMPACTS OF ANIMAL DISEASE

Despite overall stability, EU countries continue facing different development prospects for raw milk supply. Following the decrease in Jan-March, milk deliveries are expected to decline in 2025 in DE, FR, NL and BE. Grassland conditions in IE are expected to be favourable, supporting an increase in its milk collection in 2025. PL will also likely continue the increasing trend of the last few years. Despite a declining herd, PL milk production increased by 3.9% in 2024 due to significant improvements in milk yields (+19%). In 2025, PL milk production is again expected to be a major driver for EU milk supply.

In some EU countries, animal disease outbreaks negatively impacted milk production in 2024 and early 2025, via the culling or declined fertility of the infected cattle herd, and reduced milk yields as a side-effect of the diseases. Several main EU milk producing regions were affected by bluetongue virus (BTV) infections in 2024 (e.g. in DE, BE, NL, FR, DK). Furthermore, several foot-and-mouth disease (FMD) cases were also identified in spring 2025 (e.g. in HU, SK), further increasing the uncertainty of the prospects for milk production.



Source: DG Agriculture and Rural Development, based on MS notifications.

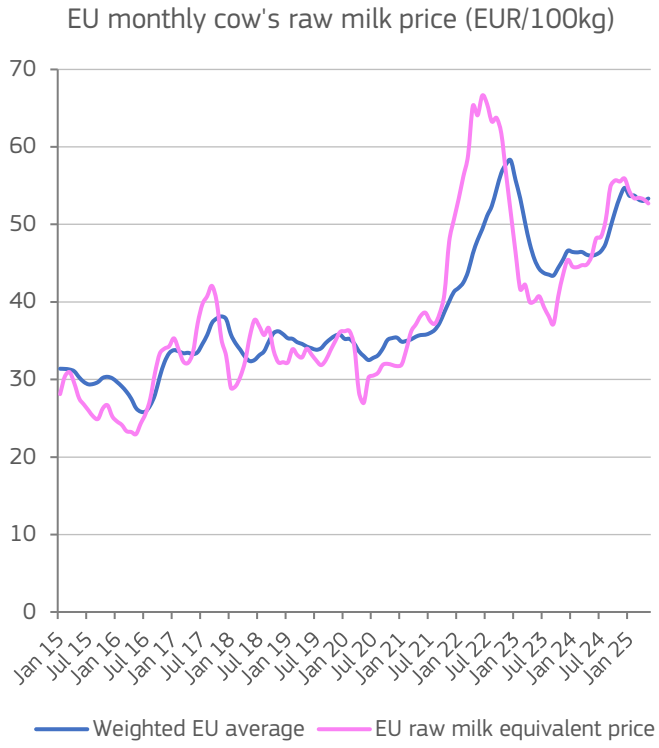
MILK AND DAIRY PRODUCTS

STABLE EU RAW MILK PRICES WELL-ABOVE HISTORICAL LEVELS

EU raw milk prices continue being stable at a level significantly above historical levels (EUR 53.3 /100 kg in May, 28% above the 5-year average). In parallel, fertilizer markets have stabilized, although at a level markedly above pre-crisis levels. While recent projections pointed to a downward direction for oil prices, the developments of the conflict in the Middle East region could make the energy price development rather unpredictable. Combining these mixed prospects with favourable grassland conditions and likely easing pressure on feed costs, input prices are expected to remain stable. Overall, margins for dairy farmers in 2025 could somewhat ease.

Consumers' demand for dairy products remains cautious, while food inflation has increased from Jan-Apr. Nevertheless, EU dairy commodity prices, except for SMP, are still at relatively high levels, supporting the development of raw milk prices.

In 2026, under an assumption of normal weather conditions and raw milk prices still above historical levels, the increasing trend in EU milk yields is assumed to still counterbalance the decreasing cow herds, leading to a marginal increase in milk deliveries, and a continued stable supply of milk solids.

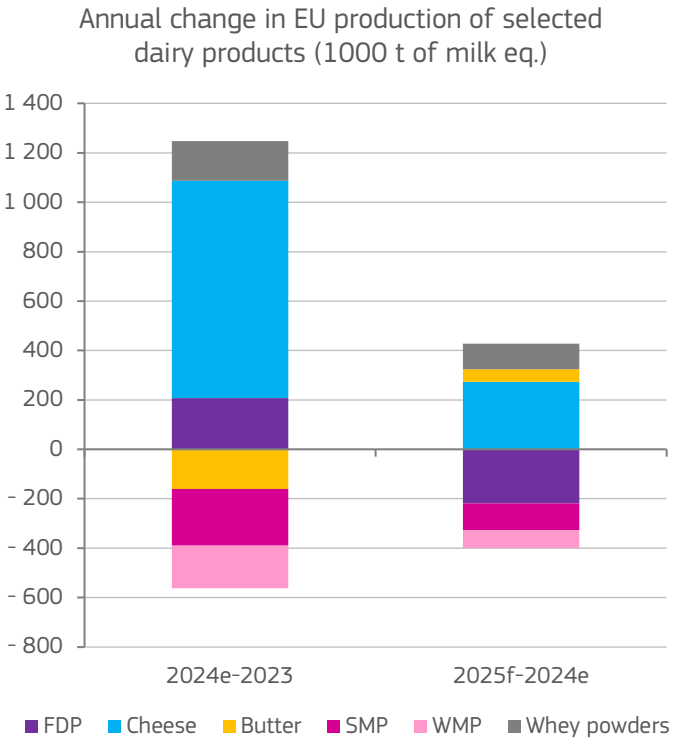


Source: DG Agriculture and Rural Development, based on MS notifications.

CHEESE AND WHEY PRODUCTION CONTINUE TO INCREASE

EU cheese production could continue increasing also in 2025 (+0.7%), although current production capacities are unlikely to allow for repeating the strong growth of 2024 (+2.3%). Increasing global competition and a possible economic slowdown in important EU export destinations (e.g. US, China) could limit the growth in EU cheese exports (+0.1% year-on-year). EU cheese imports can continue increasing (+5%) to support a recovery of demand in certain segments although food inflation continues growing overall. However, potentially increasing tariffs globally and trade disruptions due to local armed conflicts can significantly impact the competitiveness of EU cheese exports.

Similar to cheese, the prospects for EU whey production are also positive in 2025 (+0.7 %). EU exports can further increase (+2 %), although weaker demand in China could limit the growth. EU domestic use is expected to remain stable (-0.1 %). In 2026, assuming stable milk fat supply, EU cheese and whey production could further increase, although relative price competitiveness and potential economic slowdown in key EU exporting regions can become a limiting factor for further growth in exports.



Source: DG Agriculture and Rural Development, based on Eurostat.

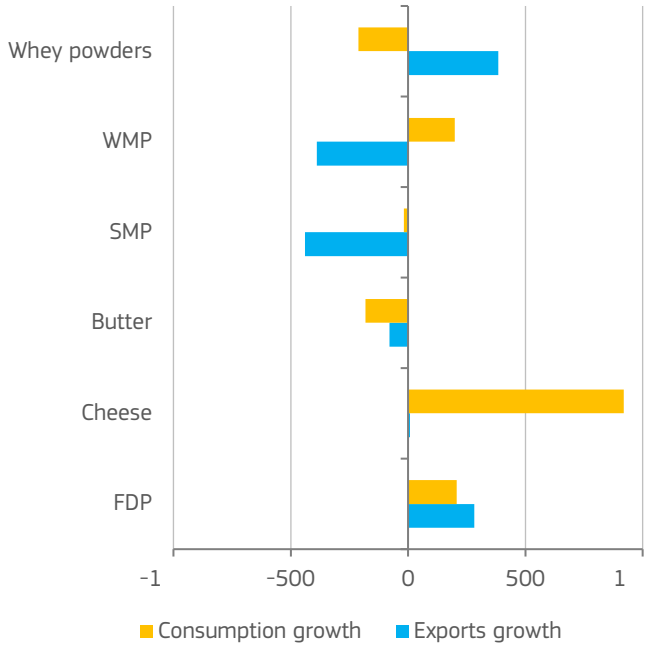
DAIRY PRODUCTS

LOW EU PRICE COMPETITIVENESS LIMITS BUTTER EXPORTS

EU butter production is likely to remain stable in 2025 (+0.3%), after a decline of -1% in 2024. At the same time, domestic use remains stable (+0.7%), with processing demand still strong. This combination of tight EU supply and stable demand could likely keep the EU prices well-above the 5 – year average. With high butter prices, EU competitiveness remains limited on the global butter market, likely leading to a decrease in EU exports this year (-2%). This follows a 4% decline in 2024. In 2026, price competitiveness and trade tensions might not allow to revert this trend.

Cream and yogurt production dynamically increased in 2024 (+3.8% and 3.3% respectively), leading to a stable supply of the fresh dairy products aggregate. In 2025, this development is likely to slow down (+0.5%), and drinking milk production is expected to continue the declining trend of the last few years (-1.5%). As a result, fresh dairy products supply could decrease (-0.8%). Although EU exports significantly increased in 2024 (+18%), the decreasing EU supply forecast could only allow for a small increase in 2025 (+3%). Nevertheless, EU domestic use of fresh dairy products is expected to continue the decreasing trend (-1%), driven by decreasing drinking milk consumption.

Annual change of EU exports and consumption in 2024e (1000 t of milk eq.)



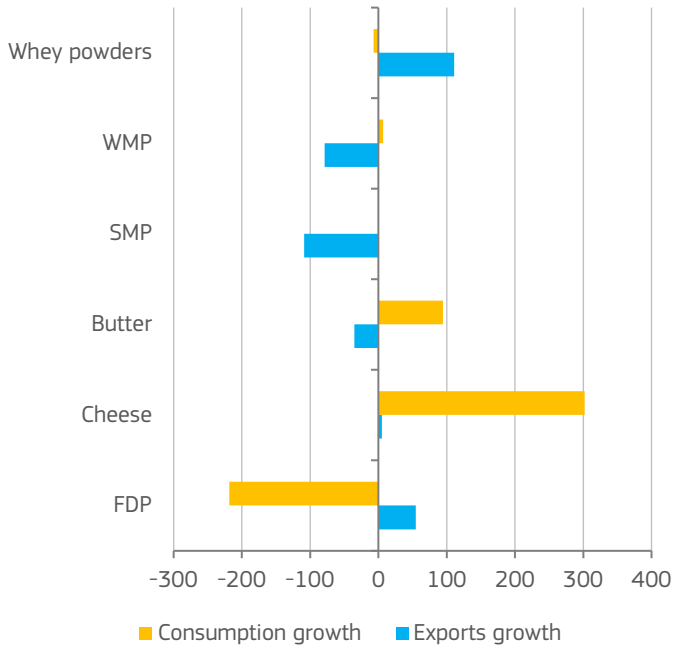
Source: DG Agriculture and Rural Development, based on Eurostat.

WHOLE MILK POWDER EXPORTS CONTINUE TO DECREASE IN 2025

EU skimmed milk powder (SMP) production is currently facing shrinking global market conditions, and is forecast to decrease by 1%, after a 2.1% decline in 2024. EU SMP exports are expected to decrease also in 2025 (-2%), after a 7% decline in the previous year. Weak import demand in Algeria in the first months of the year, combined with continuing weak import demand in China and strong competition with New Zealand on the South Asian markets are all potential limiting factors for EU SMP exports. In parallel, EU internal demand for processing could remain stable.

EU whole milk powder (WMP) exports decreased substantially in 2024 (-20%) due to an increased competition with New Zealand on key export markets, while Chinese import demand remains weak. These market conditions are unlikely to change significantly in 2025, and the decline in EU exports to Algeria can worsen them further. Therefore, WMP exports are expected to further decrease (-5%) in 2025. In parallel, EU WMP production is expected to decrease by 1.7%, but this could still satisfy domestic use, which likely remains stable (+0.3%). In 2026, the likely limited EU milk pool combined with a preference for cheese and whey production is not expected to allow for significantly increasing SMP production. Uncertain economic growth in the MENA regions can also negatively impact SMP and WMP exports.

Annual change of EU exports and consumption in 2025f (1000 t of milk eq.)



Source: DG Agriculture and Rural Development, based on Eurostat.

MEAT PRODUCTS

KEY MESSAGES

EU per capita meat consumption remains robust despite high prices

EU pigmeat production could remain stable in 2025

Positive market prospects could drive EU poultry production up (+1.8% year-on-year)

HIGHLIGHTS

Overall, EU per capita meat consumption is expected to remain stable in 2025 (+0.5% year-on-year) with robust demand, despite high prices, in almost all meat markets. High prices are expected to foster also EU overall meat imports, but beef, poultry and pigmeat could still sustain their positive trade balance.

After an uplift in EU beef production in 2024 (+3%), the structural decline in the cow herd drives a decline in EU beef production by an expected 1.3% in 2025 and could fall further in 2026. While beef prices reached historic high levels, EU beef demand still seems to remain robust with per capita EU beef consumption estimated at 9.9 kg in 2025 (-0.9% year-on-year). With high beef prices and tight supply, EU meat exports are expected to decline by 4%, whereas imports are forecast to increase by 5%.

The recovery in EU pigmeat production observed last year (+2%) continued in Jan-Mar with a higher number of pigs slaughtered and a higher carcass weight. However, due to a declining breeding sow herd, less production is expected in the second half of 2025, leading to a relatively stable production forecast (-0.4%). The same goes for consumption (-0.2%) with pigmeat currently being the cheapest meat. Lower demand from China and the UK could slow down EU exports by 3% in 2025.

With historically high poultry prices, the EU poultry sector is witnessing rather positive market prospects in 2025, with an expected 1.8% growth in production and a 2% increase in exports. Despite strong demand for poultry (per capita consumption forecast to grow 2%), highly pathogenic avian influenza (HPAI) and shortage of hatching eggs could limit further production expansion and remains a concern for the sector. Prices are driving up EU imports from different parts of the world. As a result, they could increase by 8% in 2025, however the HPAI outbreak in Brazil last May could lead to a less positive increase overall.

A shrinking EU sheep flock lead to a decline in the forecast for sheep and goat meat production in 2025 (-2%) with less animals slaughtered; the decline is partly compensated by higher carcass weights supported by high market prices and cheaper feed. Sustained demand and high domestic prices keep imports high (+6% in 2025), while meat exports decline further by 1% due to a lack of price competitiveness on the world market.

BEEF AND VEAL

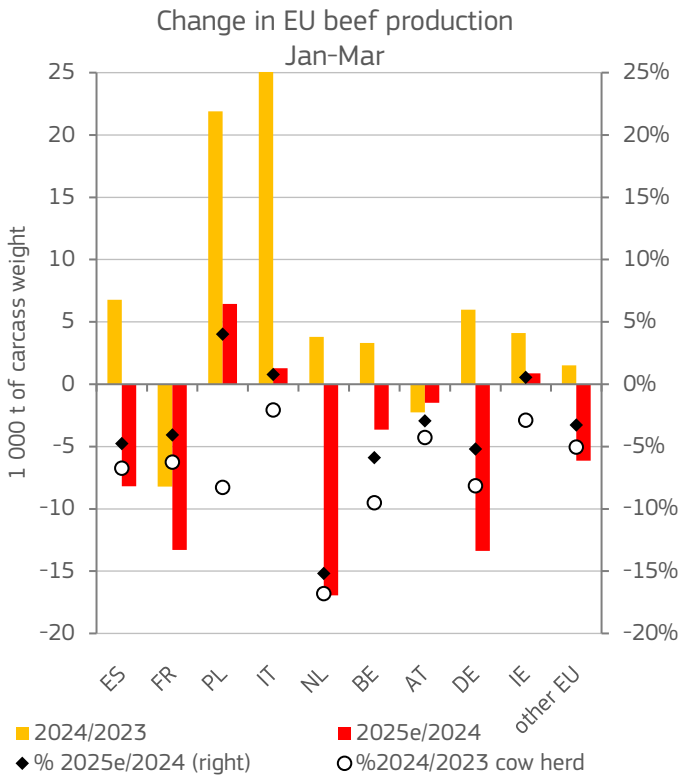
ROBUST EU BEEF CONSUMPTION DESPITE HIGHER PRICES

After an uplift in 2024 (+3% year-on-year), EU beef production declined by 3.3% in Jan-Mar, with output falling in most EU countries. Fewer heads slaughtered are due to a decline in the cattle herd, leading to an overall tight supply. The three largest EU beef producing countries noted a decline at the start of this year: FR (-4.1%), ES (-4.8%), DE (- 5.2%). However, some others (IE, IT, HU, PL, and RO) recorded a (small) increase over the same period.

Compared to mid-June last year, the EU adult male indicative price has increased by 30% to EUR 663 /100kg. With historical high prices in the beef market, EU cattle farmers are expected to produce heavier cows for slaughter. In Jan-Mar, this resulted in a 2% annual increase in carcass weight.

Despite higher carcass weight, EU beef production is estimated to decline by 1.3% in 2025. In 2026, the downward trend in beef production is expected to continue due to the shrinking herd.

With increasing prices for beef, global and EU beef demand still seems to remain robust. Per capita EU beef consumption is estimated to remain relatively stable in 2025 at 9.9 kg (-0.9% year-on-year).

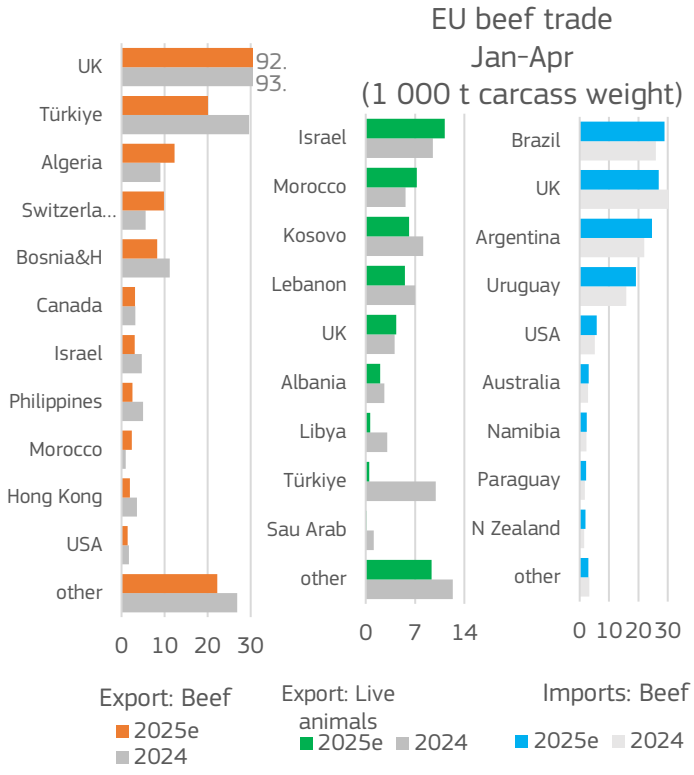


Source: DG Agriculture and Rural Development, based on Eurostat.

BEEF EXPORTS DROP, WHILE IMPORTS increase

In 2024, EU beef meat exports increased by 8.9%. However, with less supply available to export, EU beef meat exports decreased by 7.6% in Jan-Apr compared to the same period last year, while live cattle exports declined by 26%. The Turkish market is the main driver of this decline (almost two - thirds of both losses). On the other hand, EU increased shipments of both to Morocco, in particular from ES. The Food and mouth disease (FMD) outbreaks in DE, HU, SK reduced their exports but had a limited impact on total EU beef exports so far. Due to a shortage of live animals, tight supply, and a declining competitiveness of the EU with Brazil and Argentina, EU meat exports are forecast to decline by 4%, and live exports by 10% in 2025.

EU beef meat imports increased by 8.3% in 2024. With its high market price, the EU remains an attractive destination for imports. In Jan-Apr, beef meat imports increased by 6.5% compared to 2024. Imports are up from MERCOSUR countries, while imports declined from the UK (-11%). Noteworthy is an increase in frozen beef imports between Jan-Apr compared to the same period last year (+16%). In 2025, it is forecast that EU beef imports could increase by 5%. Though uncertainties remain with existing geopolitical tensions..



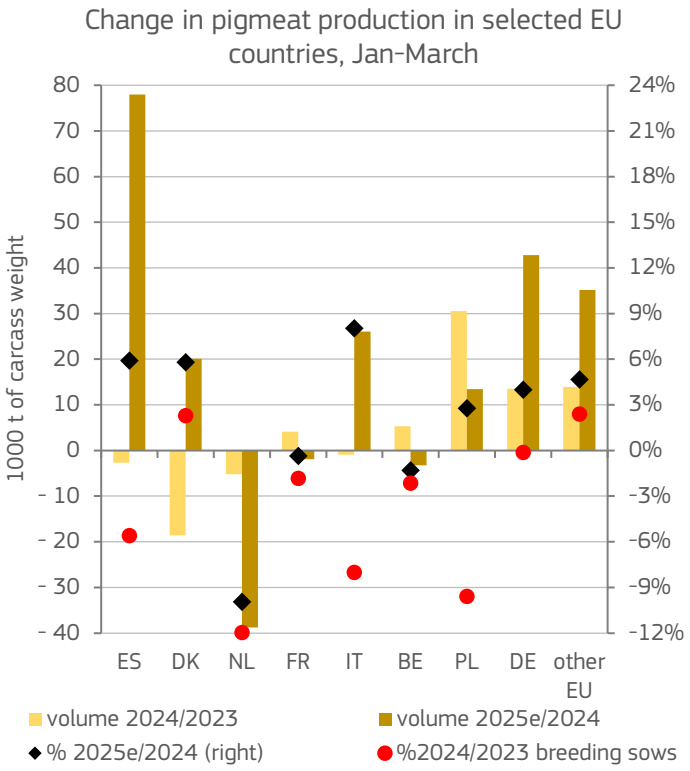
Source: DG Agriculture and Rural Development, based on Eurostat.

PIGMEAT

EU PIGMEAT CONSUMPTION SUPPORTED BY COMPETITIVE PRICES

The production recovery in EU pigmeat production observed last year (+2%/2023) was extended further in Jan-Mar (+3.2% year-on-year). It grew in most EU countries, except for BE, EL, FR, HR, LU, NL and SK. Among the largest EU pigmeat producing countries, the production grew in ES (+6%), DE (+4%), DK (+4%), PL (+3%). This increase in the EU pigmeat production was driven by both higher numbers of pigs for slaughter (+1.3% in heads), and an increase in the carcass weight (+1.8%). However, given the decline in breeding sows recorded in the December 2024 livestock survey (-3% year-on-year), it is forecast that EU pigmeat production could see a decline in the second half of 2025, leading to a relatively stable production overall (-0.4%). Though, African Swine Fever (ASF) outbreaks remain a risk for production.

The EU weighted average pigmeat price has started to increase again as from February this year. However, it is still slightly below last year's level, but above the 5-year average. With slightly lower feed prices, margins remain positive. The climbing prices could signal that the EU pigmeat demand is strong, especially because pigmeat is currently the cheapest meat. Nevertheless, considering an uplift in pigmeat consumption last year (+2.4%), the consumption is forecast to remain stable in 2025 (31.7 kg/capita).

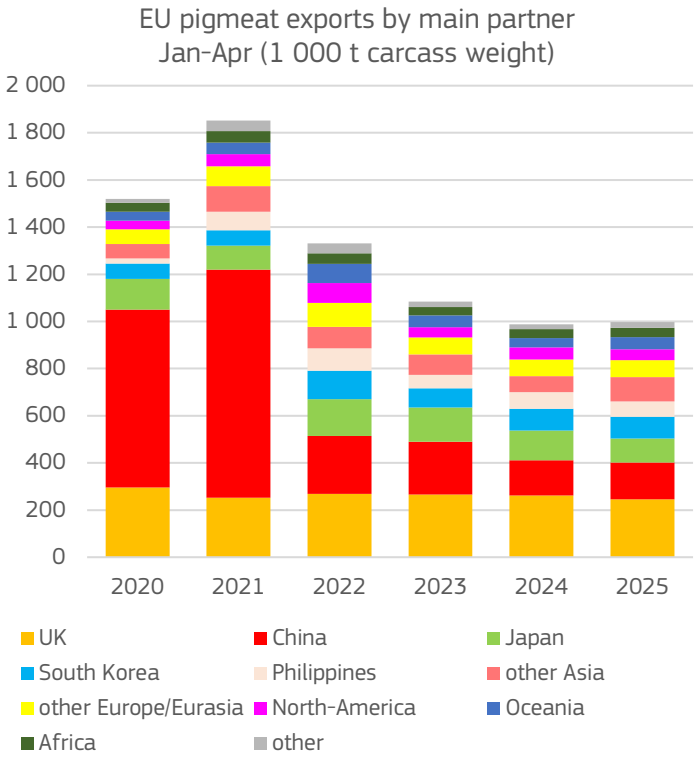


Source: DG Agriculture and Rural Development, based on Eurostat.

...WHILE THE EU IS LESS COMPETITIVE GLOBALLY

At the moment, EU pigmeat prices remain substantially higher compared to its main competitors (Brazil, US, Canada) limiting export opportunities. After 4 years of declining EU exports, they have been relatively stable in Jan-Apr (+0.9%/2024). However, EU shipments declined to some high-value markets like the UK (- 6%), Japan (-19%) and the US (-9.5%). On the other hand, they doubled to Viet Nam, who is struggling with ASF, due to a significant increase in pork lard. EU pigmeat exports to China have been up so far (+3.8%). However, with increasing production forecasts in China and the UK for 2025 (leading to reduced import demand), EU exports are estimated to decline by 3% in 2025, if the price gap between EU and international competitors remains stable. The Chinese anti-dumping investigation into EU pigmeat is extended until December 2025. With possible countervailing duties from China, EU exports could further decline. Contributingto the uncertainty, possible US tariffs can create both opportunities and risks for EU exports.

EU imports declined between Jan-Mar by almost 8%. In particular because of declining exports from Chile and Switzerland to the EU. UK pigmeat exports (accounting for about 70% of total EU pigmeat imports) to the EU have increased so far, leading to a marginal increase in the EU imports forecast for 2025 (+1%). However, in 2026 EU imports are forecast to decline again.



Source: DG Agriculture and Rural Development, based on Eurostat.

POULTRY MEAT

consumption increases, while prices higher

After a continued recovery in EU poultry production by 5.3% in 2024, it is estimated to be stable (-0.3%) in Jan-Mar compared to the same period last year. In particular, production increased in EL (17%), SK (8%), ES (7%), HR (7%), BG (6%), PT (6%) and SI (5%). On the other hand, it declined in PL, IT and HU presumably hindered by highly pathogenic avian influenza (HPAI) outbreaks.

EU poultry prices are on an increasing trend since the beginning of the year. The whole broiler price in mid-June is 13% above last year's price (EUR 306 /100kg), boosting profitability. This price development signals a strong demand for poultry combined with a tight supply on the EU market in the first months of the year.

In 2025, EU poultry production is forecast to increase by 1.8%, driven by strong consumer demand, slightly lower feed costs, and higher output prices for producers, while HPAI and the shortage of hatching eggs limit further expansion. If prices will remain high in 2026, and a mild season of HPAI outbreaks would occur, production could continue to increase in 2026.

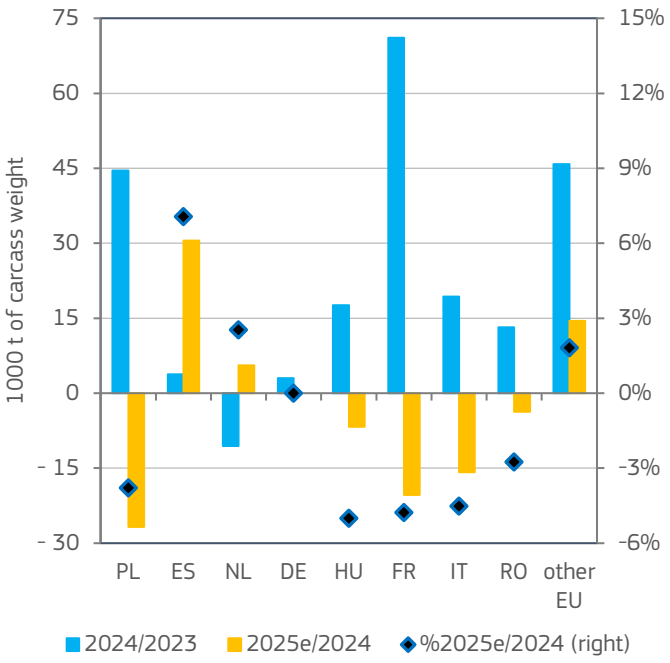
Higher availability through EU production, and the favourable image of poultry as a more sustainable, healthier and convenient alternative for EU consumers compared to other animal proteins, are expected to support EU per capita consumption growth in 2025 by 0.5 kg (+2% year-on-year).

Imports AND Exports increasing

In Jan-Apr, EU imports increased by 34 000 t (+12% year-on-year) led by higher EU prices pulling Brazilian exports to the EU market (+24%). In addition, there has been an increase of (mainly processed) poultry shipments from Thailand (+5 300 t, or +10%), and China (+ 8 300 t, or +62%) in Jan - Apr, which is expected to increase also in 2026. After last year's recovery, imports from the UK continued to increase by 5.6% while imports from Ukraine lowered by 8.5% and are expected to decline throughout 2025 following the re-introduction of a proportional quota for the remaining part of the year. Overall, EU imports in 2025 are forecast to increase by 8%. However, following the HPAI outbreak in Brazil in May 2025, the EU suspended all poultry imports from this origin. In 2024, 33% of EU poultry imports came from Brazil, and depending on its development, this could limit import increase overall.

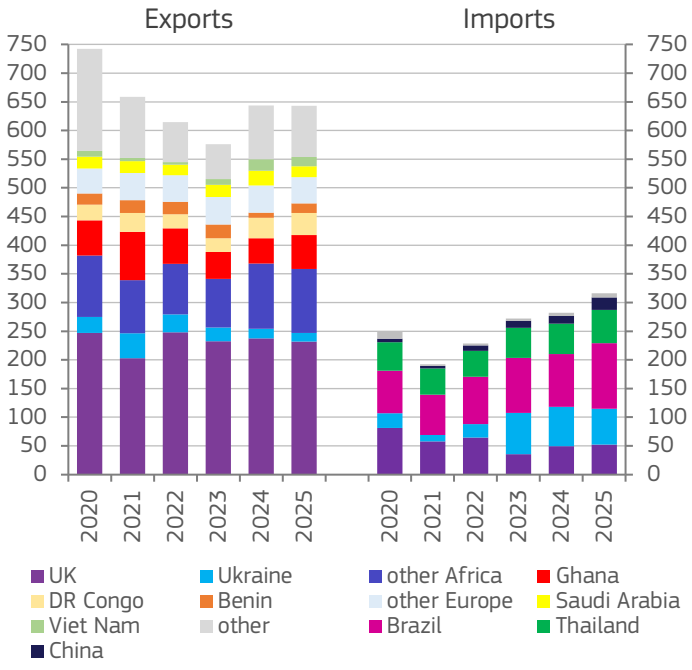
In the same period, EU exports were stable. Shipments increased to Africa (+12%) with main destinations being Ghana, DR Congo, Congo and Benin making up for the decline in exports to the UK (-2.4%), Saudi-Arabia (-25%) who is increasing its own production capacity, Ukraine (-11%), Viet Nam (-22%) and Philippines (-14%). In 2025, EU exports are expected to increase by 2% year-on-year in line with the increase in production forecast.

Change in poultry production in selected EU countries, Jan-Mar



Source: DG Agriculture and Rural Development, based on Eurostat.

EU poultry trade by main partners Jan-Apr (1 000 t carcass weight)



Source: DG Agriculture and Rural Development, based on Eurostat.

SHEEP AND GOAT MEAT

Stable consumption despite high prices…

In Jan-Mar, EU sheep and goat production is estimated to have declined by around 10% compared to the same period last year (off-farm slaughtering data for e.g. RO and BG are not yet available). In particular, there has been a significant decline in sheep meat production in FR (-18%), and in IE (- 20%) through a lack of supply. On the other hand, sheep meat production was stable in EL (-1%) and ES (+0.9%). The decline in EU production in Q1 is driven by several factors. First, there is a lack of supply as the sheep and goat herd declined by 3.6% in 2024. Second, there is some carry-over of lambs from last year, and farmers retain their animals as prices were high at the start of the year while winter feed has been cheaper. In addition, Easter fell in April this year, expecting that part of the decline between Jan-Mar is a seasonal effect. In the same period, carcass weight has been up around 5% compared to the same period last year.

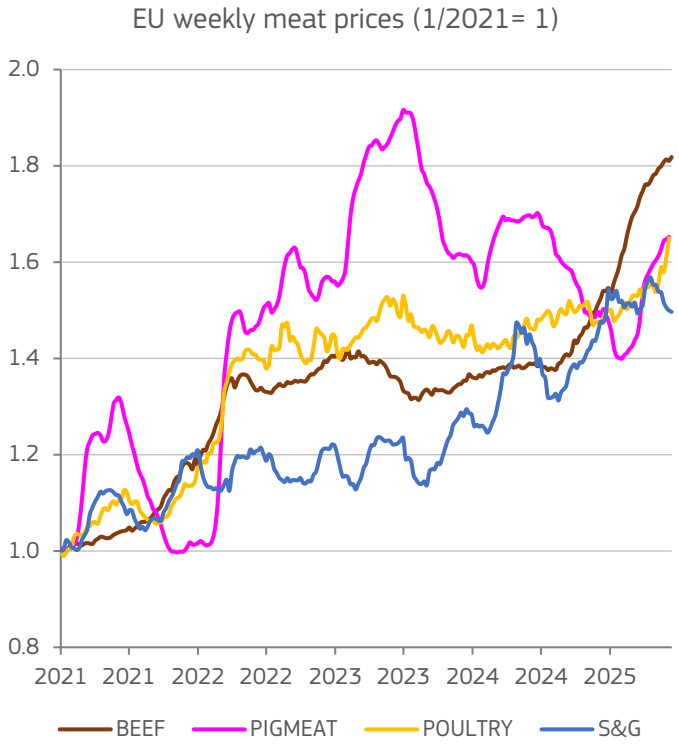
Therefore, in 2025, it is estimated that there will be less animals slaughtered but higher carcass weights, supported by high market prices. It is forecast that EU sheep and goat meat production could decline by 2%. Following the structural decline in the herd, production is expected to decline again in 2026. Despite the increase in prices, it is forecast that consumption per capita would remain stable like in the previous 5 years, with consumer demand linked to religious and cultural festivities.

… leading to an inCREASE in imports

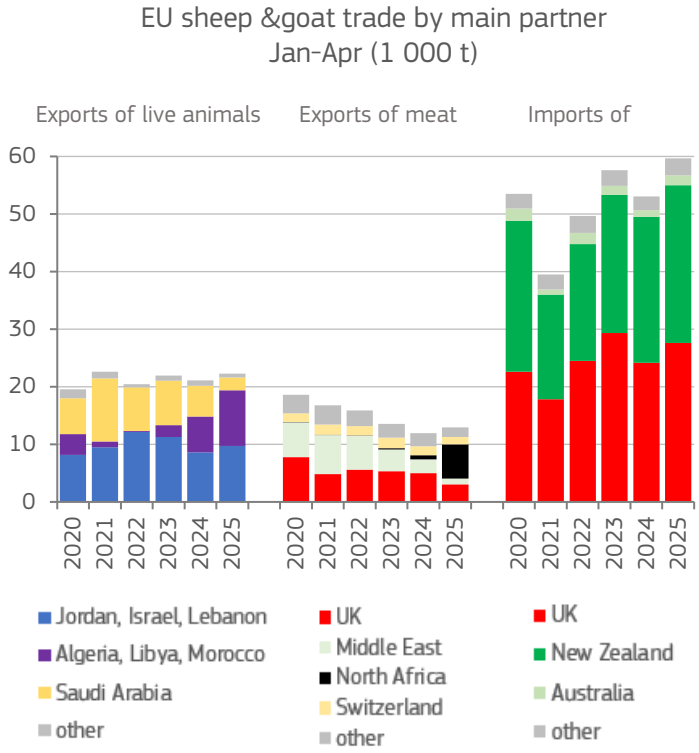
Following the annual declines in EU meat exports between 2020 and 2024, they have increased by 9.5% in Jan-Apr this year. While shipments declined over the years to some traditional destinations in the Middle East region (as Australia increases its exports to these destinations), they increased to Algeria and Morocco. This trend is also visible in live sheep exports from ES to North Africa (+5% between Jan-Apr). Following the good start of the year, live exports of sheep and goat are forecast to increase overall by 1% in 2025.

In the same period, the EU exports of meat to the UK declined (-38%), driven by lower supply in IE and an unfavourable price gap with the UK. In 2025, EU meat exports are forecast to decline by 1% with the decline in EU production, a higher intra-EU trade of meat, and a lower price competitiveness.

UK sheep production is expected to grow in 2025, which is visible in the EU imports from the UK in Jan-Apr (+14%, 3 500 t). Also New Zealand (+8%, 2 000 t), Australia (+54%, + 616 t), Argentina (+82%, 367 t) and Uruguay (+208%, 179 t) increased shipments to the EU, as the high prices of the EU markets attract more imports. In 2025, EU sheep and goat meat imports are forecast to increase by 6%. With the gradual increase in the use of quota by New Zealand and higher export volumes shipped from Australia, EU sheep and goat meat imports could continue increasing further.



Source: DG Agriculture and Rural Development, based on MS notifications.



Source: DG Agriculture and Rural Development, based on Eurostat.

ANNEX

This chapter presents balances sheets of key EU agricultural markets. The balance sheets refer to seven calendar years for meat and dairy, seven marketing years for crops, eight marketing years for apples and oranges, seven calendar years for peaches & nectarines and tomatoes. Starting and ending months of marketing years are indicated under respective tables. The 5-year average is an arithmetic average for animal products and an olympic average in crops tables.

The balance sheets are based on analyses of economic analysts and market experts in DG Agriculture and Rural development. They are based on market information and data available until mid-June 2025.

All available years of all EU balance sheets are visualised in Agri-food data portal, in the form of both tables and graphs.

TABLE 1.1 EU total cereals balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	53 242	51 825	52 126	51 113	50 608	49 009	50 171	-3.2	-5.2	2.4	-2.0
Yield (t/ha)	5.6	5.5	5.7	5.3	5.3	5.3	5.7	-1.6	-3.8	8.3	6.2
Beginning stocks	**39.2**	**42.4**	**40.8**	**47.2**	**50.8**	**43.4**	**35.2**	**-14.7**	**-0.2**	**-18.9**	**-20.7**
Gross production	297.1	283.0	295.3	269.1	270.2	257.4	285.4	-4.7	-9.0	10.8	4.1
Usable production	294.5	280.5	292.8	266.7	267.8	255.2	282.9	-4.7	-9.0	10.8	4.1
Imports	25.8	21.1	22.2	40.1	33.6	31.8	25.7	-5.3	16.7	-19.3	-12.1
Availability	**359.5**	**343.9**	**355.8**	**354.1**	**352.2**	**330.4**	**343.7**	**-6.2**	**-6.7**	**4.0**	**-1.8**
Domestic use	260.3	258.6	258.9	253.7	255.6	257.6	258.4	0.8	-0.1	0.3	0.4
- Human	58.5	58.4	58.8	59.2	59.5	59.7	59.8	0.3	1.4	0.2	1.1
- Seed	9.1	9.0	9.0	9.0	9.0	9.0	9.0	0.0	0.0	0.0	0.0
- Industrial	29.6	28.7	30.3	29.2	30.3	30.3	30.3	0.0	2.0	0.0	1.2
o.w. bioethanol/biofuel	11.4	11.0	11.9	10.8	12.1	12.1	12.1	0.0	5.8	0.0	3.7
- Animal feed	163.0	162.5	160.9	156.4	156.9	158.6	159.3	1.1	-0.9	0.4	0.3
Losses (excl. on-farm)	1.8	1.7	1.8	1.6	1.6	1.5	1.7	-4.7	-9.0	10.8	4.1
Exports	55.1	42.9	47.9	47.9	51.6	36.1	45.4	-30.0	-26.5	25.7	-1.8
Total use	**317.2**	**303.2**	**308.6**	**303.2**	**308.9**	**295.2**	**305.5**	**-4.4**	**-3.8**	**3.5**	**0.2**
Ending stocks	**42.4**	**40.8**	**47.2**	**50.8**	**43.4**	**35.2**	**38.3**	**-18.9**	**-20.7**	**8.8**	**-12.6**
- Market	42.4	40.8	47.2	50.8	43.4	35.2	38.3	-18.9	-20.7	8.8	-12.6
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate (%)	*113*	*108*	*113*	*105*	*105*	*99*	*109*	-5.4	-9.0	10.5	3.2

Note 1: the cereals marketing year is July-June.
Note 2: Area and yield (of cereals) are reported per calendar year and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.2 EU soft wheat balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	22 068	20 664	21 816	21 929	21 916	20 203	21 213	-7.8	-7.7	5.0	-1.2
Yield (t/ha)	6.0	5.8	6.0	5.8	5.8	5.6	6.1	-3.2	-4.5	9.3	5.6
Beginning stocks	**9.4**	**9.6**	**8.7**	**15.5**	**19.5**	**16.8**	**9.9**	**-13.9**	**46.0**	**-41.1**	**-29.1**
Gross production	132.2	119.0	130.0	126.8	126.2	112.6	129.2	-10.8	-11.8	14.8	4.2
Usable production	131.1	118.1	129.0	125.8	125.2	111.7	128.2	-10.8	-11.8	14.8	4.2
Imports	2.7	2.0	2.8	9.7	9.6	7.8	3.0	-18.8	54.4	-61.5	-55.5
Availability	**143.3**	**129.7**	**140.5**	**151.0**	**154.3**	**136.2**	**141.1**	**-11.7**	**-6.0**	**3.6**	**-1.0**
Domestic use	96.0	92.9	95.0	98.1	101.4	101.7	102.2	0.3	5.5	0.5	4.1
- Human	41.2	41.0	41.2	41.6	41.8	41.9	42.0	0.3	1.3	0.2	1.1
- Seed	4.6	4.6	4.6	4.6	4.6	4.6	4.6	0.0	0.0	0.0	0.0
- Industrial	9.7	9.1	9.4	8.8	9.2	9.2	9.2	0.0	-0.4	0.0	0.4
o.w. bioethanol/biofuel	3.7	3.1	3.4	2.8	3.4	3.4	3.4	0.0	3.0	0.0	3.0
- Animal feed	40.5	38.2	39.8	43.1	45.8	46.0	46.4	0.5	11.9	0.9	8.2
Losses (excl. on-farm)	0.8	0.7	0.8	0.8	0.8	0.7	0.8	-10.8	-11.8	14.8	4.2
Exports	36.9	27.4	29.3	32.7	35.4	24.0	29.8	-32.2	-26.0	24.1	0.0
Total use	**133.7**	**121.0**	**125.0**	**131.5**	**137.5**	**126.4**	**132.8**	**-8.1**	**-2.9**	**5.1**	**4.0**
Ending stocks	**9.6**	**8.7**	**15.5**	**19.5**	**16.8**	**9.9**	**8.3**	**-41.1**	**-29.1**	**-15.6**	**-40.6**
- Market	9.6	8.7	15.5	19.5	16.8	9.9	8.3	-41.1	-29.1	-15.6	-40.6
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate (%)	*137*	*127*	*136*	*128*	*124*	*110*	*125*	-3.7	40.3	14.2	-0.7

Note 1: the soft wheat marketing year is July-June.
Note 2: Area and yield (of soft wheat) are reported per calendar year and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.3 EU durum wheat balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	2 145	2 112	2 260	2 284	2 317	2 083	2 165	-10.1	-6.6	4.0	-2.4
Yield (t/ha)	3.5	3.5	3.6	3.3	3.2	3.5	3.7	8.3	1.9	6.6	8.4
Beginning stocks	**2.3**	**1.7**	**2.2**	**1.3**	**0.8**	**0.7**	**0.6**	**-17.8**	**-62.0**	**-4.0**	**-50.7**
Gross production	7.5	7.4	8.2	7.5	7.5	7.3	8.1	-2.7	-2.8	10.8	7.9
Usable production	7.4	7.3	8.1	7.5	7.4	7.2	8.0	-2.7	-2.8	10.8	7.9
Imports	2.4	2.9	1.4	2.0	2.5	2.5	2.4	0.1	8.6	-6.4	0.0
Availability	**12.1**	**12.0**	**11.6**	**10.8**	**10.7**	**10.4**	**11.0**	**-3.2**	**-9.5**	**5.7**	**-0.7**
Domestic use	9.0	9.0	9.1	9.1	9.0	9.0	9.0	0.3	-0.1	0.2	0.0
- Human	8.1	8.1	8.1	8.1	8.2	8.2	8.2	0.3	1.2	0.2	1.0
- Seed	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0
- Industrial	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0
- Animal feed	0.4	0.4	0.5	0.5	0.3	0.3	0.3	1.1	-30.0	0.9	-23.7
Losses (excl. on-farm)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-2.7	-2.8	10.8	7.9
Exports	1.3	0.8	1.2	0.9	1.1	0.7	0.9	-32.1	-29.8	27.5	0.0
Total use	**10.3**	**9.8**	**10.3**	**10.0**	**10.1**	**9.8**	**10.0**	**-3.1**	**-3.7**	**2.3**	**0.0**
Ending stocks	**1.7**	**2.2**	**1.3**	**0.8**	**0.7**	**0.6**	**1.0**	**-4.0**	**-50.7**	**57.2**	**7.0**
- Market	1.7	2.2	1.3	0.8	0.7	0.6	1.0	-4.0	-50.7	57.2	7.0
Self-sufficiency rate (%)	*83*	*82*	*89*	*82*	*83*	*80*	*89*	-3.0	-2.7	10.5	7.9

Note 1: the durum wheat marketing year is July-June.
Note 2: Area and yield (of durum wheat) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.4 EU barley balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	11 139	11 019	10 268	10 288	10 368	10 300	10 250	-0.7	-2.5	-0.5	-0.7
Yield (t/ha)	5.0	4.9	5.1	5.0	4.6	4.8	5.2	5.1	-3.5	8.9	6.3
Beginning stocks	**2.0**	**4.4**	**4.6**	**4.1**	**5.7**	**3.6**	**3.1**	**-35.6**	**-16.8**	**-14.4**	**-28.7**
Gross production	55.5	54.4	51.9	51.9	47.5	49.6	53.7	4.4	-6.0	8.4	5.2
Usable production	55.0	53.9	51.4	51.4	47.0	49.1	53.3	4.4	-6.0	8.4	5.2
Imports	1.9	1.2	1.1	2.0	2.0	1.3	1.5	-33.9	-23.6	15.8	0.0
Availability	**59.0**	**59.6**	**57.1**	**57.6**	**54.7**	**54.1**	**57.9**	**-1.1**	**-6.6**	**7.1**	**2.6**
Domestic use	43.7	44.1	42.2	41.7	40.8	42.2	42.5	3.4	-0.9	0.7	1.1
- Human	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.3	1.2	0.2	1.0
- Seed	2.1	2.1	2.1	2.1	2.1	2.1	2.1	0.0	0.0	0.0	0.0
- Industrial	6.7	6.0	6.7	6.7	6.8	6.8	6.8	0.0	1.5	0.0	1.0
o.w. bioethanol/biofuel	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.0	22.9	0.0	14.2
- Animal feed	34.5	35.6	33.0	32.5	31.5	32.9	33.2	4.3	-1.4	0.9	1.1
Losses (excl. on-farm)	0.3	0.3	0.3	0.3	0.3	0.3	0.3	4.4	-6.0	8.4	5.2
Exports	10.5	10.6	10.5	9.9	10.0	8.5	10.1	-14.6	-17.6	19.0	0.0
Total use	**54.5**	**55.0**	**53.0**	**51.9**	**51.0**	**51.0**	**52.9**	**-0.1**	**-4.1**	**3.8**	**1.8**
Ending stocks	**4.4**	**4.6**	**4.1**	**5.7**	**3.6**	**3.1**	**5.0**	**-14.4**	**-28.7**	**60.5**	**21.6**
- Market	4.4	4.6	4.1	5.7	3.6	3.1	5.0	-14.4	-28.7	60.5	21.6
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate (%)	*126*	*122*	*122*	*123*	*115*	*117*	*125*	1.0	-4.9	7.7	4.3

Note 1: the barley marketing year is July-June.
Note 2: Area and yield (of barley) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.5 EU maize balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	8 911	9 254	9 247	8 839	8 299	8 815	8 700	6.2	-2.0	-1.3	-3.0
Yield (t/ha)	7.9	7.3	7.9	6.0	7.4	6.8	7.5	-8.4	-10.0	9.9	4.0
Beginning stocks	**23.4**	**21.4**	**19.3**	**20.2**	**20.2**	**19.2**	**19.1**	**-5.0**	**-6.8**	**-0.6**	**-4.2**
Gross production	70.4	67.7	73.5	53.3	61.5	59.8	64.9	-2.7	-10.1	8.5	3.0
Usable production	70.1	67.4	73.2	53.1	61.2	59.6	64.6	-2.7	-10.1	8.5	3.0
Imports	18.5	14.5	16.3	25.9	19.0	19.7	18.3	3.5	10.0	-7.0	0.0
Availability	**112.0**	**103.3**	**108.8**	**99.2**	**100.4**	**98.5**	**102.0**	**-2.0**	**-5.5**	**3.6**	**1.0**
Domestic use	84.3	79.9	81.6	74.5	76.1	76.5	77.6	0.6	-3.3	1.4	0.2
- Human	4.7	4.7	4.7	4.7	4.8	4.8	4.8	0.3	1.2	0.2	1.0
- Seed	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0
- Industrial	11.1	11.3	11.9	11.4	12.0	12.0	12.0	0.0	4.0	0.0	2.0
o.w. bioethanol/biofuel	6.2	6.2	6.8	6.3	6.9	6.9	6.9	0.0	7.3	0.0	3.5
- Animal feed	68.1	63.5	64.6	58.0	58.9	59.4	60.4	0.8	-4.8	1.8	-0.2
Losses (excl. on-farm)	0.4	0.4	0.4	0.3	0.4	0.4	0.4	-2.7	-10.1	8.5	3.0
Exports	5.9	3.7	6.6	4.2	4.8	2.5	4.2	-48.3	-49.6	69.1	0.0
Total use	**90.6**	**84.0**	**88.6**	**79.0**	**81.3**	**79.4**	**82.2**	**-2.3**	**-6.2**	**3.6**	**0.8**
Ending stocks	**21.4**	**19.3**	**20.2**	**20.2**	**19.2**	**19.1**	**19.8**	**-0.6**	**-4.2**	**3.8**	**1.2**
- Market	21.4	19.3	20.2	20.2	19.2	19.1	19.8	-0.6	-4.2	3.8	1.2
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate (%)	*83*	*84*	*90*	*71*	*80*	*78*	*83*	-3.3	-5.9	7.0	2.9

Note 1: the maize marketing year is July-June.
Note 2: Area and yield (of maize) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.6 EU rye balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	2 191	2 071	1 916	1 750	1 859	1 701	1 739	-8.5	-12.7	2.2	-5.6
Yield (t/ha)	3.9	4.3	4.1	4.3	4.1	4.2	4.1	2.5	0.1	-1.0	-1.6
Beginning stocks	**0.2**	**0.9**	**0.9**	**1.3**	**1.0**	**0.7**	**0.1**	**-25.7**	**-22.0**	**-89.7**	**-92.0**
Gross production	8.5	8.9	7.9	7.4	7.6	7.1	7.2	-6.2	-11.3	1.2	-6.3
Usable production	8.3	8.7	7.8	7.3	7.4	6.9	7.0	-6.2	-11.3	1.2	-6.3
Imports	0.0	0.1	0.3	0.1	0.2	0.1	0.1	-31.7	0.0	10.9	0.0
Availability	**8.5**	**9.7**	**9.0**	**8.7**	**8.6**	**7.8**	**7.2**	**-9.0**	**-11.0**	**-7.2**	**-17.3**
Domestic use	7.3	8.6	7.4	7.5	7.5	7.5	6.8	-0.8	-0.4	-8.8	-9.2
- Human	3.0	3.0	3.0	3.1	3.1	3.1	3.1	0.3	1.7	0.2	1.1
- Seed	0.4	0.3	0.3	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0
- Industrial	1.3	1.5	1.5	1.5	1.5	1.5	1.5	0.0	0.0	0.0	0.0
o.w. bioethanol/biofuel	0.7	0.9	0.9	0.9	0.9	0.9	0.9	0.0	0.0	0.0	0.0
- Animal feed	2.6	3.8	2.6	2.7	2.7	2.6	1.9	-2.6	-2.0	-25.8	-27.2
Losses (excl. on-farm)	0.0	0.1	0.0	0.0	0.0	0.0	0.0	-6.2	-11.3	1.2	-6.3
Exports	0.3	0.2	0.2	0.2	0.3	0.2	0.2	-20.7	0.0	-8.7	0.0
Total use	**7.6**	**8.8**	**7.7**	**7.7**	**7.8**	**7.7**	**7.0**	**-1.5**	**-0.3**	**-8.8**	**-9.2**
Ending stocks	**0.9**	**0.9**	**1.3**	**1.0**	**0.7**	**0.1**	**0.2**	**-89.7**	**-92.0**	**153.9**	**-78.3**
- Market	0.9	0.9	1.3	1.0	0.7	0.1	0.2	-89.7	-92.0	153.9	-78.3
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate (%)	114	102	104	97	98	93	103	-5.5	-8.7	11.0	3.9

Note 1: the rye marketing year is July-June.
Note 2: Area and yield (of rye) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.7 EU sorghum balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	190	196	152	127	156	228	167	*45.7*	*37.2*	*-26.7*	*-0.6*
Yield (t/ha)	5.3	5.3	5.4	4.2	5.3	4.6	5.0	*-13.8*	*-13.8*	*9.1*	*-1.1*
Beginning stocks	**1.4**	**1.8**	**1.2**	**1.0**	**0.5**	**0.2**	**0.3**	***-67.5***	***-87.7***	***68.6***	***-71.8***
Gross production	1.0	1.0	0.8	0.5	0.8	1.0	0.8	*25.6*	*17.5*	*-20.0*	*-6.5*
Usable production	1.0	1.0	0.8	0.5	0.8	1.0	0.8	*25.6*	*17.5*	*-20.0*	*-6.5*
Imports	0.1	0.0	0.2	0.0	0.0	0.0	0.0	*162.3*	*0.0*	*-25.3*	*0.0*
Availability	**2.5**	**2.8**	**2.1**	**1.6**	**1.3**	**1.2**	**1.1**	***-6.6***	***-42.6***	***-8.9***	***-35.1***
Domestic use	0.6	1.6	1.1	1.1	1.1	0.9	0.9	*-17.4*	*-16.8*	*0.8*	*-16.2*
- Human	0.2	0.2	0.2	0.2	0.2	0.2	0.2	*0.3*	*1.2*	*0.2*	*1.0*
- Seed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	*0.0*	*0.0*	*0.0*	*0.0*
- Industrial	0.0	0.0	0.0	0.0	0.0	0.0	0.0	*0.0*	*0.0*	*0.0*	*0.0*
- Animal feed	0.5	1.4	0.9	0.9	0.9	0.7	0.7	*-20.9*	*-20.4*	*0.9*	*-19.7*
Losses (excl. on-farm)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	*25.6*	*17.5*	*-20.0*	*-6.5*
Exports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	*21.0*	*0.0*	*0.3*	*0.0*
Total use	**0.7**	**1.6**	**1.1**	**1.1**	**1.1**	**0.9**	**0.9**	***-16.8***	***-16.3***	***0.6***	***-15.8***
Ending stocks	**1.8**	**1.2**	**1.0**	**0.5**	**0.2**	**0.3**	**0.1**	***68.6***	***-71.8***	***-43.8***	***-75.6***
- Market	1.8	1.2	1.0	0.5	0.2	0.3	0.1	*68.6*	*-71.8*	*-43.8*	*-75.6*
Self-sufficiency rate (%)	*152*	*62*	*71*	*46*	*71*	*109*	*86*	*52.0*	*59.1*	*-20.6*	*26.3*

Note 1: the sorghum marketing year is July-June.
Note 2: Area and yield (of sorghum) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.8 EU oats balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	2 391	2 570	2 554	2 342	2 305	2 501	2 481	*8.5*	*3.0*	*-0.8*	*0.6*
Yield (t/ha)	2.9	3.3	2.9	3.2	2.6	3.1	3.1	*21.3*	*3.3*	*-0.7*	*0.3*
Beginning stocks	**0.2**	**0.4**	**1.3**	**1.3**	**1.3**	**0.7**	**1.9**	***-44.7***	***-24.6***	***158.0***	***72.3***
Gross production	6.9	8.5	7.5	7.4	5.9	7.8	7.6	*31.6*	*6.5*	*-1.5*	*1.1*
Usable production	6.9	8.4	7.4	7.4	5.8	7.7	7.6	*31.6*	*6.5*	*-1.5*	*1.1*
Imports	0.1	0.0	0.2	0.2	0.1	0.1	0.1	*15.4*	*0.0*	*3.1*	*0.0*
Availability	**7.2**	**8.8**	**8.8**	**8.8**	**7.3**	**8.5**	**9.6**	***17.4***	***2.8***	***12.3***	***9.9***
Domestic use	6.5	7.4	7.3	7.4	6.4	6.4	6.5	*0.9*	*-8.7*	*0.7*	*-7.6*
- Human	1.0	1.1	1.1	1.1	1.1	1.1	1.1	*0.3*	*1.3*	*0.2*	*1.0*
- Seed	0.4	0.4	0.4	0.4	0.4	0.4	0.4	*0.0*	*0.0*	*0.0*	*0.0*
- Industrial	0.1	0.1	0.1	0.1	0.1	0.1	0.1	*0.0*	*0.0*	*0.0*	*0.0*
- Animal feed	5.1	5.8	5.7	5.8	4.8	4.9	4.9	*1.1*	*-12.0*	*0.9*	*-10.0*
Losses (excl. on-farm)	0.0	0.1	0.0	0.0	0.0	0.0	0.0	*31.6*	*6.5*	*-1.5*	*1.1*
Exports	0.2	0.1	0.2	0.1	0.1	0.2	0.1	*34.2*	*0.0*	*-12.5*	*0.0*
Total use	**6.8**	**7.5**	**7.5**	**7.5**	**6.5**	**6.6**	**6.7**	***1.7***	***-8.7***	***0.4***	***-7.7***
Ending stocks	**0.4**	**1.3**	**1.3**	**1.3**	**0.7**	**1.9**	**2.9**	*158.0*	*72.3*	*53.9*	*124.7*
- Market	0.4	1.3	1.3	1.3	0.7	1.9	2.9	*158.0*	*72.3*	*53.9*	*124.7*
Self-sufficiency rate (%)	*105*	*114*	*102*	*100*	*91*	*119*	*117*	***30.4***	***16.6***	***-2.2***	***10.6***

Note 1: the oats marketing year is July-June.
Note 2: Area and yield (of oats) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.9 EU triticale balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	2 754	2 754	2 655	2 585	2 551	2 360	2 475	-7.5	-11.4	4.9	-4.7
Yield (t/ha)	4.1	4.5	4.4	4.4	4.3	4.3	4.4	-0.3	-1.7	3.1	1.3
Beginning stocks	**0.0**	**1.8**	**2.1**	**2.0**	**1.6**	**1.3**	**0.0**	**-19.8**	**-29.4**	**-98.0**	**-98.6**
Gross production	11.2	12.3	11.7	11.4	11.0	10.1	11.0	-7.7	-11.3	8.2	-3.4
Usable production	11.0	12.1	11.4	11.1	10.7	9.9	10.7	-7.7	-11.3	8.2	-3.4
Imports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	132.8	0.0	17.9	0.0
Availability	**11.0**	**13.9**	**13.6**	**13.2**	**12.3**	**11.2**	**10.8**	**-9.2**	**-14.0**	**-3.9**	**-17.4**
Domestic use	9.1	11.7	11.5	11.5	11.0	11.1	10.6	1.0	-1.9	-4.7	-6.9
- Human	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.3	1.2	0.2	1.0
- Seed	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.0	0.0	0.0	0.0
- Industrial	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0
o.w. bioethanol/biofuel	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Animal feed	8.1	10.7	10.5	10.5	10.0	10.1	9.6	1.1	-2.1	-5.2	-7.5
Losses (excl. on-farm)	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-7.7	-11.3	8.2	-3.4
Exports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	30.0	0.0	-15.7	0.0
Total use	**9.2**	**11.8**	**11.6**	**11.6**	**11.1**	**11.2**	**10.7**	**1.0**	**-2.0**	**-4.7**	**-6.8**
Ending stocks	**1.8**	**2.1**	**2.0**	**1.6**	**1.3**	**0.0**	**0.1**	-98.0	-98.6	308.9	-93.5
- Market	1.8	2.1	2.0	1.6	1.3	0.0	0.1	-98.0	-98.6	308.9	-93.5
Self-sufficiency rate (%)	*121*	*103*	*100*	*97*	*98*	*89*	*101*	**-8.6**	**-10.9**	**13.5**	**3.4**

Note 1: the triticale marketing year is July-June.
Note 2: Area and yield (of triticale) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.10 EU other cereals balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	1 454	1 185	1 258	968	837	818	979	-2.3	-28.1	19.7	-1.8
Yield (t/ha)	2.7	3.1	3.0	2.8	2.8	2.7	2.9	-3.1	-6.6	7.5	0.4
Beginning stocks	**0.3**	**0.4**	**0.4**	**0.4**	**0.3**	**0.2**	**0.2**	**-31.0**	**-40.3**	**-20.6**	**-52.6**
Gross production	3.9	3.7	3.8	2.7	2.3	2.2	2.8	-5.3	-35.3	28.7	-2.4
Usable production	3.7	3.5	3.7	2.6	2.2	2.1	2.7	-5.3	-35.3	28.7	-2.4
Imports	0.2	0.2	0.2	0.1	0.1	0.2	0.2	12.4	0.0	-2.1	0.0
Availability	**4.2**	**4.0**	**4.2**	**3.2**	**2.7**	**2.5**	**3.0**	**-7.4**	**-34.7**	**22.5**	**-7.9**
Domestic use	3.8	3.6	3.8	2.8	2.4	2.2	2.3	-7.4	-33.6	0.7	-23.0
- Human	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	1.2	0.2	1.0
- Seed	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0
- Industrial	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0
- Animal feed	3.3	3.1	3.3	2.4	2.0	1.8	1.8	-9.2	-38.9	0.9	-27.3
Losses (excl. on-farm)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-5.3	-35.3	28.7	-2.4
Exports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	44.9	0.0	0.6	0.0
Total use	**3.8**	**3.6**	**3.8**	**2.9**	**2.5**	**2.3**	**2.3**	**-7.1**	**-33.4**	**0.9**	**-22.7**
Ending stocks	**0.4**	**0.4**	**0.4**	**0.3**	**0.2**	**0.2**	**0.7**	**-20.6**	**-52.6**	**320.9**	**130.0**
- Market	0.4	0.4	0.4	0.3	0.2	0.2	0.7	-20.6	-52.6	320.9	130.0
Self-sufficiency rate (%)	*99*	*98*	*97*	*92*	*91*	*93*	*119*	2.3	-2.4	27.8	26.7

Note 1: the other cereals marketing year is July-June.
Note 2: Area and yield (of other cereals) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.11 EU oilseeds balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	**10 364**	**10 660**	**10 635**	**11 915**	**11 866**	**11 619**	**11 444**	***-2.1***	***5.1***	***-1.5***	***0.5***
Rapeseed	5 119	5 322	5 326	5 887	6 193	5 696	5 953	*-8.0*	*3.4*	*4.5*	*5.6*
Soya beans	908	943	940	1 095	985	1 117	988	*13.4*	*16.9*	*-11.6*	*-2.0*
Sunflower	4 338	4 396	4 369	4 934	4 688	4 805	4 503	*2.5*	*7.2*	*-6.3*	*-2.7*
Yield (t/ha)	**2.7**	**2.7**	**2.8**	**2.6**	**2.7**	**2.4**	**2.6**	***-11.7***	***-11.1***	***8.3***	***-2.4***
Rapeseed	3.0	3.1	3.3	3.3	3.2	2.9	3.0	*-8.1*	*-8.9*	*1.9*	*-7.1*
Soya beans	3.0	2.8	2.9	2.2	2.8	2.7	2.7	*-5.8*	*-5.5*	*1.9*	*-1.5*
Sunflower	2.4	2.0	2.1	1.9	2.1	1.7	2.1	*-17.5*	*-17.7*	*20.6*	*3.6*
Production	**28.4**	**28.3**	**30.1**	**31.3**	**32.3**	**28.0**	**31.2**	***-13.5***	***-6.6***	***11.6***	***4.4***
Rapeseed	15.4	16.7	17.1	19.6	19.7	16.7	18.9	*-15.4*	*-6.1*	*13.4*	*6.5*
Soya beans	2.7	2.6	2.6	2.4	2.8	3.0	2.8	*6.8*	*11.7*	*-6.1*	*4.3*
Sunflower	10.2	9.0	10.4	9.3	9.8	8.3	9.5	*-15.4*	*-15.3*	*14.4*	*1.2*
Domestic use	**49.9**	**50.6**	**50.0**	**52.2**	**50.1**	**48.5**	**51.0**	***-3.2***	***-3.4***	***5.0***	***1.5***
Rapeseed	21.6	23.3	22.1	25.9	24.3	23.3	24.3	*-4.3*	*0.2*	*4.2*	*2.6*
of which crushing	21.1	22.7	21.5	25.2	23.7	22.8	23.7	*-3.7*	*0.7*	*4.2*	*3.1*
Soya beans	17.7	17.8	17.0	15.5	15.7	16.9	16.8	*7.7*	*0.7*	*-0.7*	*1.6*
of which crushing	15.8	15.9	15.0	13.4	13.6	14.7	14.6	*8.3*	*-0.3*	*-1.0*	*1.0*
Sunflower	10.6	9.4	10.9	10.8	10.1	8.3	9.9	*-17.3*	*-20.5*	*19.0*	*-1.9*
of which crushing	9.3	8.2	9.7	9.5	8.9	7.3	8.7	*-18.3*	*-21.3*	*19.9*	*-1.8*
Imports	**21.8**	**21.6**	**21.3**	**22.2**	**19.5**	**21.9**	**21.0**	***12.7***	***1.7***	***-4.3***	***-2.9***
Rapeseed	6.1	5.8	5.4	6.8	5.5	7.0	5.8	*27.9*	*20.8*	*-17.2*	*-4.2*
Soya beans	14.7	15.0	14.7	13.3	13.2	14.3	14.2	*8.2*	*0.7*	*-0.7*	*0.9*
Sunflower	1.0	0.8	1.1	2.1	0.8	0.6	1.0	*-17.8*	*-35.8*	*55.7*	*7.5*
Exports	**1.1**	**1.0**	**1.1**	**1.4**	**1.2**	**1.4**	**1.2**	***10.4***	***16.8***	***-11.0***	***-2.2***
Rapeseed	0.3	0.2	0.5	0.5	0.5	0.4	0.4	*-27.1*	*-11.4*	*12.8*	*-4.2*
Soya beans	0.2	0.2	0.3	0.2	0.2	0.4	0.2	*76.2*	*68.4*	*-40.6*	*-4.0*
Sunflower	0.6	0.7	0.4	0.6	0.5	0.6	0.5	*21.6*	*7.5*	*-6.9*	*-0.9*
Ending stocks	**4.0**	**2.3**	**2.6**	**2.6**	**3.0**	**3.0**	**3.0**	***0.0***	***10.9***	***0.0***	***10.9***
Rapeseed	1.5	0.5	0.5	0.5	0.8	0.8	0.8	*0.0*	*36.4*	*0.0*	*36.4*
Soya beans	1.5	1.1	1.2	1.2	1.3	1.3	1.3	*0.0*	*5.4*	*0.0*	*5.4*
Sunflower	1.0	0.7	0.9	0.9	0.9	0.9	0.9	*0.0*	*0.9*	*0.0*	*0.9*
Self-sufficiency rate (%)	*57*	*56*	*60*	*60*	*65*	*58*	*61*				

Note 1: the oilseeds marketing year is July-June.
Note 2: Area and yield (of oilseeds) are reported per calendar year and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.12 EU oilmeals balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2024/25 vs 5-yr. av.
Production	**29.6**	**30.0**	**29.5**	**30.2**	**29.1**	**28.6**	**29.9**	***-1.7***	***-3.6***	***4.3***	***1.1***
Rapeseed	12.0	12.9	12.3	14.4	13.5	13.0	13.5	*-3.7*	*0.7*	*4.2*	*3.1*
Soya beans	12.5	12.6	11.9	10.6	10.8	11.6	11.5	*8.3*	*-0.3*	*-1.0*	*1.0*
Sunflower	5.1	4.5	5.3	5.2	4.9	4.0	4.8	*-18.3*	*-21.3*	*19.9*	*-1.8*
Domestic use	**47.9**	**47.6**	**46.5**	**47.4**	**46.5**	**48.9**	**47.4**	***5.1***	***3.6***	***-3.1***	***0.4***
Rapeseed	11.9	12.6	12.2	14.4	13.4	12.8	13.4	*-5.0*	*0.2*	*5.1*	*3.6*
Soya beans	28.4	28.4	27.6	26.0	25.9	29.8	27.2	*14.9*	*9.0*	*-8.8*	*-0.6*
Sunflower	7.5	6.6	6.8	7.0	7.2	6.3	6.8	*-11.5*	*-8.9*	*6.9*	*0.1*
Imports	**20.3**	**19.7**	**19.5**	**19.6**	**19.8**	**21.9**	**19.8**	***10.6***	***11.2***	***-9.6***	***0.5***
Rapeseed	0.5	0.5	0.6	0.8	0.8	0.5	0.6	*-36.5*	*-16.1*	*19.1*	*-2.8*
Soya beans	16.8	16.6	16.5	16.0	15.7	18.7	16.4	*18.7*	*14.1*	*-12.3*	*0.0*
Sunflower	3.0	2.7	2.4	2.8	3.2	2.7	2.8	*-16.4*	*-3.6*	*3.7*	*3.7*
Exports	**2.0**	**2.1**	**2.4**	**2.4**	**2.4**	**1.6**	**2.3**	***-32.1***	***-29.1***	***40.3***	***-0.5***
Rapeseed	0.6	0.8	0.7	0.8	0.9	0.7	0.7	*-14.3*	*0.0*	*0.0*	*-2.0*
Soya beans	0.8	0.8	0.8	0.6	0.6	0.5	0.7	*-7.9*	*-28.1*	*39.1*	*11.4*
Sunflower	0.6	0.6	0.9	1.0	1.0	0.4	0.8	*-61.7*	*-55.1*	*122.6*	*0.0*
Ending stocks	**0.5**	**0.5**	**0.5**	**0.5**	**0.5**	**0.5**	**0.5**	***0.0***	***0.0***	***0.0***	***0.0***
Rapeseed	0.1	0.1	0.1	0.1	0.1	0.1	0.1	*0.0*	*0.0*	*0.0*	*0.0*
Soya beans	0.3	0.3	0.3	0.3	0.3	0.3	0.3	*0.0*	*0.1*	*0.0*	*0.0*
Sunflower	0.1	0.1	0.1	0.1	0.1	0.1	0.1	*0.0*	*0.0*	*0.0*	*0.0*
Self-sufficiency rate (%)	*62*	*63*	*63*	*64*	*63*	*59*	*63*				

Note: the oilmeals marketing year is July-June.

TABLE 1.13 EU vegetable oils balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2024/25 vs 5-yr. av.
Production	**15.7**	**15.9**	**15.9**	**17.0**	**16.2**	**15.3**	**16.3**	***-5.0***	***-4.0***	***6.3***	***2.0***
Rapeseed	8.7	9.3	8.8	10.3	9.7	9.3	9.7	*-3.7*	*0.7*	*4.2*	*3.1*
Soya beans	3.2	3.2	3.0	2.7	2.7	2.9	2.9	*8.3*	*-0.3*	*-1.0*	*1.0*
Sunflower	3.9	3.5	4.1	4.0	3.7	3.1	3.7	*-18.3*	*-21.3*	*19.9*	*-1.8*
Palm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	*0.0*	*0.0*	*0.0*	*0.0*
Domestic use	**23.8**	**22.1**	**22.3**	**22.2**	**21.7**	**18.8**	**19.3**	***-13.1***	***-15.2***	***2.8***	***-12.1***
Rapeseed	8.8	8.9	9.0	10.1	9.4	9.1	9.6	*-3.8*	*-0.6*	*5.9*	*4.5*
Soya beans	2.7	2.7	2.5	2.3	2.7	2.7	2.5	*-0.5*	*1.2*	*-6.4*	*-4.9*
Sunflower	5.5	4.4	5.3	4.7	5.6	4.7	4.9	*-16.6*	*-9.1*	*4.5*	*-0.2*
Palm	6.9	6.2	5.4	5.1	3.9	2.4	2.3	*-39.0*	*-56.7*	*-2.1*	*-51.0*
Imports	**10.4**	**8.8**	**8.6**	**8.1**	**8.1**	**5.9**	**5.6**	***-27.5***	***-30.7***	***-5.7***	***-33.0***
Rapeseed	0.5	0.3	0.5	0.4	0.5	0.3	0.4	*-35.1*	*-31.8*	*46.5*	*13.1*
Soya beans	0.5	0.5	0.5	0.5	0.7	0.5	0.5	*-30.9*	*-9.9*	*11.0*	*0.0*
Sunflower	2.3	1.7	2.0	2.0	3.0	2.3	2.1	*-20.9*	*10.7*	*-9.7*	*-0.2*
Palm	7.1	6.3	5.5	5.2	4.1	2.8	2.5	*-30.9*	*-50.8*	*-10.7*	*-49.4*
Exports	**2.3**	**2.6**	**2.3**	**3.0**	**2.7**	**2.4**	**2.6**	***-8.0***	***-2.3***	***4.5***	***-0.3***
Rapeseed	0.4	0.7	0.3	0.7	0.7	0.6	0.6	*-21.6*	*0.0*	*0.0*	*-11.0*
Soya beans	0.9	1.0	1.0	0.9	0.7	0.8	0.9	*5.1*	*-20.2*	*25.3*	*6.1*
Sunflower	0.8	0.7	0.8	1.3	1.1	0.7	0.9	*-34.3*	*-19.5*	*24.2*	*1.8*
Palm	0.2	0.1	0.2	0.2	0.1	0.4	0.2	*232.9*	*164.2*	*-62.1*	*0.0*
Ending stocks	**1.5**	**1.5**	**1.5**	**1.5**	**1.5**	**1.5**	**1.5**	***0.0***	***0.0***	***0.0***	***0.0***
Rapeseed	0.6	0.6	0.6	0.6	0.6	0.6	0.6	*0.0*	*0.0*	*0.0*	*0.0*
Soya beans	0.2	0.2	0.2	0.2	0.2	0.2	0.2	*0.0*	*0.0*	*0.0*	*0.0*
Sunflower	0.3	0.3	0.3	0.3	0.3	0.3	0.3	*0.1*	*0.0*	*0.0*	*0.1*
Palm	0.5	0.5	0.5	0.5	0.5	0.5	0.5	*-0.1*	*0.0*	*0.0*	*0.0*
Self-sufficiency rate (%)	*66*	*72*	*71*	*77*	*75*	*82*	*84*				

Note: the vegetable oils marketing year is July-June.

TABLE 1.14 EU protein crops balance sheet (million tonnes)

	EU							% variation			
	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (1 000 ha)	**1 990**	**2 121**	**2 121**	**2 135**	**2 503**	**2 687**	**2 278**	***7.4***	***26.4***	***-15.2***	***1.1***
Field peas	786	789	777	776	982	1 007	841	*2.5*	*28.5*	*-16.5*	*-1.1*
Broad beans	409	447	474	436	478	502	479	*5.1*	*11.0*	*-4.5*	*2.8*
Lupins	174	226	205	260	222	266	236	*19.5*	*22.0*	*-11.1*	*0.0*
other dry pulses	622	658	665	664	820	912	722	*11.2*	*37.6*	*-20.9*	*0.7*
Yield (t/ha)	**1.8**	**1.9**	**1.8**	**1.9**	**1.6**	**1.7**	**1.9**	***7.3***	***-6.1***	***7.9***	***2.8***
Field peas	2.56	2.43	2.36	2.40	1.94	2.07	2.38	*6.5*	*-13.9*	*15.1*	*4.4*
Broad beans	2.53	2.80	2.38	2.97	2.44	2.78	2.75	*14.0*	*7.3*	*-0.9*	*3.0*
Lupins	1.23	1.51	1.57	1.74	1.64	1.81	1.66	*10.4*	*15.1*	*-8.7*	*0.3*
other dry pulses	0.18	0.18	0.20	0.17	0.14	0.13	0.16	*-9.9*	*-28.1*	*26.8*	*-1.7*
Production	**3 966**	**4 562**	**4 340**	**4 646**	**4 549**	**5 271**	**4 787**	***15.9***	***17.6***	***-9.2***	***4.4***
Field peas	2 012	1 920	1 837	1 866	1 907	2 083	2 000	*9.2*	*9.7*	*-4.0*	*5.4*
Broad beans	1 033	1 254	1 126	1 292	1 163	1 393	1 319	*19.8*	*18.0*	*-5.4*	*6.6*
Lupins	215	342	321	452	365	482	391	*32.0*	*40.4*	*-18.8*	*1.2*
Lentils	110	116	132	113	114	115	115	*0.2*	*0.0*	*0.4*	*0.0*
Chickpeas	173	137	181	175	176	175	176	*-0.9*	*0.0*	*0.4*	*0.0*
other dry pulses	423	792	742	747	823	1 024	787	*24.4*	*34.6*	*-23.2*	*-0.1*
Domestic use	**4 843**	**5 578**	**5 471**	**5 946**	**5 750**	**6 369**	**5 892**	***10.8***	***13.7***	***-7.5***	***2.3***
Field peas	2 170	2 266	2 174	2 253	2 361	2 430	2 355	*2.9*	*8.9*	*-3.1*	*2.7*
Broad beans	885	1 007	1 029	1 175	971	1 219	1 135	*25.6*	*21.6*	*-6.9*	*6.0*
Lupins	383	526	524	743	580	682	597	*17.6*	*25.5*	*-12.5*	*0.2*
Lentils	329	327	323	351	350	337	338	*-3.9*	*0.4*	*0.4*	*0.0*
Chickpeas	300	247	276	312	347	304	302	*-12.5*	*2.8*	*-0.7*	*1.5*
other dry pulses	777	1 205	1 145	1 111	1 141	1 397	1 166	*22.5*	*23.4*	*-16.6*	*0.2*
Imports	**1 439**	**1 621**	**1 635**	**1 892**	**1 913**	**1 669**	**1 685**	***-12.8***	***-2.8***	***1.0***	***-2.7***
Field peas	385	574	552	586	808	570	577	*-29.4*	*0.0*	*1.1*	*0.0*
Broad beans	113	82	145	240	114	124	128	*9.2*	*0.0*	*2.9*	*0.0*
Lupins	169	184	203	292	215	201	206	*-6.8*	*0.0*	*2.8*	*0.0*
Lentils	227	218	198	242	243	229	230	*-5.7*	*0.0*	*0.3*	*0.0*
Chickpeas	154	126	106	146	182	142	138	*-22.0*	*0.0*	*-2.9*	*0.0*
other dry pulses	390	438	431	386	351	402	406	*14.6*	*0.0*	*1.0*	*0.0*
Exports	**562**	**605**	**504**	**592**	**712**	**571**	**579**	***-19.8***	***-2.6***	***1.5***	***-1.7***
Field peas	227	228	215	199	354	223	222	*-37.0*	*0.0*	*-0.6*	*0.0*
Broad beans	262	329	243	357	306	299	311	*-2.3*	*0.0*	*4.2*	*0.0*
Lupins	0	0	0	0	0	0	0	*-6.8*	*0.0*	*-1.2*	*0.0*
Lentils	8	7	6	5	7	7	7	*-0.2*	*0.0*	*-1.6*	*0.0*
Chickpeas	28	16	11	9	11	13	12	*15.3*	*0.0*	*-8.6*	*0.0*
other dry pulses	37	25	28	21	33	29	27	*-13.3*	*0.0*	*-5.1*	*0.0*
Self-sufficiency rate (%)	*82*	*82*	*79*	*78*	*79*	*83*	*81*				

Note 1: the protein crops marketing year is July-June.
Note 2: Area and yield (of protein crops) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006)

TABLE 1.15 EU white sugar balance sheet (million tonnes white sugar equivalent)

	EU						% variation			
	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	2025/2026f	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Area (of sugar beet) (1 000 ha)	1 471	1 493	1 426	1 468	1 601	1 471	*9.1*	-	*-8.1*	*-0.4*
Yield (of sugar beet) (t/ha)	68.5	75.9	72.5	75.1	75.6	76.2	*0.7*	-	*0.7*	*2.4*
Production (of sugar beet) (million t of beet)	101	113	103	110	121	112	*9.9*	-	*-7.5*	*2.8*
Beginning stocks	2.2	1.2	1.5	2.1	2.1	2.0	*3.5*	-	*-6.9*	*4.4*
White sugar production	14.5	16.6	14.6	15.6	16.6	15.2	*6.5*	-	*-8.1*	*-2.3*
Imports	1.3	1.4	2.3	1.4	0.7	1.4	*-52.9*	-	*121.4*	*6.3*
Availability	**18.1**	**19.2**	**18.5**	**19.0**	**19.4**	**18.7**	*2.1*	-	*-3.6*	*-1.1*
Domestic use white sugar	**15.9**	**16.9**	**15.8**	**15.3**	**15.7**	**15.7**	*2.5*	-	*0.1*	*-0.8*
- Human	14.7	15.0	14.0	14.1	14.2	14.2	*0.7*	-	*0.1*	*-1.0*
o.w. net exports in processed products	1.8	1.9	1.8	1.7	1.7	1.7	*2.2*	-	*0.6*	*-2.4*
- Industrial	1.2	1.9	1.8	1.2	1.5	1.5	*24.4*	-	*0.0*	*-0.3*
o.w. bioethanol	0.7	0.8	0.7	0.8	0.8	0.8	*1.1*	-	*0.0*	*1.9*
Exports	0.9	0.8	0.6	1.6	1.7	1.0	*6.6*	-	*-40.8*	*-7.2*
Total use	**16.8**	**17.7**	**16.4**	**16.9**	**17.4**	**16.7**	*2.9*	-	*-4.0*	*-2.0*
Ending stocks	**1.2**	**1.5**	**2.1**	**2.1**	**2.0**	**2.0**	*-6.9*	-	*-0.6*	*6.6*
Change in stocks	-0.9	0.3	0.6	0.1	-0.1	0.0				
Self-sufficiency rate (%)	*91*	*98*	*93*	*102*	*106*	*97*				

Note 1: the sugar marketing year is October-September.
Note 2: Area and yield (of sugar beet) are reported per calendar year and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

TABLE 1.16 EU isoglucose balance sheet (thousand tonnes)

	EU						% variation			
	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	0	2024/25 vs 2023/24	2024/25 vs 5-yr. av.	2025/26 vs 2024/25	2025/26 vs 5-yr. av.
Beginning stocks	13.5	13.2	15.0	19.0	23.9	0.0	*25.8*	-	*-100.0*	*-100.0*
Production	619.9	577.4	433.0	494.9	499.6	0.0	*0.9*	-	*-100.0*	*-100.0*
Imports	3.9	2.8	3.9	2.9	2.1	0.0	*-27.6*	-	*-100.0*	*-100.0*
Availability	**637.3**	**593.4**	**451.9**	**516.8**	**525.6**	**0.0**	*1.7*	-	*-100.0*	*-100.0*
Domestic use	**535.9**	**505.7**	**384.6**	**446.7**	**452.9**	**0.0**	*1.4*	-	*-100.0*	*-100.0*
Share in caloric sweetener use %	3.3	2.9	2.4	2.8	2.8	0.0	*0.0*	-	*-100.0*	*-100.0*
Exports	88.2	72.7	48.3	46.1	46.7	0.0	*1.3*	-	*-100.0*	*-100.0*
Total use	**624.1**	**578.4**	**432.9**	**492.8**	**499.6**	**0.0**	*1.4*	-	*-100.0*	*-100.0*
Ending stocks	13.2	15.0	19.0	24.0	26.0	0.0	*8.3*	-	*-100.0*	*-100.0*
Self-sufficiency rate (%)	*116*	*114*	*113*	*111*	*110*	*0*				

Note: the isoglucose marketing year is October-September.

SPECIALISED CROPS

OLIVE OIL

TABLE 2.1 EU olive oil balance sheet (thousand tonnes)

	EU								% variation			
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	23/24 vs 22/23	23/24 vs 5-yr. av.	24/25 vs 23/24	24/25 vs 5-yr. av.
Area (of olives for oil) (1 000 ha)	4 851	4 880	4 854	4 864	4 816	4 671	4 677	4 766	0.1	-3.5	1.9	-0.3
Yield (of olives for oil) (t/ha)	2.1	2.6	2.0	2.4	2.5	1.6	2.0	2.7	22.3	-14.4	36.1	26.6
Yield (of oil of olives) (oil/kg of olives)	0.21	0.18	0.20	0.18	0.19	0.18	0.17	0.16	-10.1	-9.1	-0.9	-9.9
Beginning stocks	322	531	784	677	616	671	410	297	-38.8	-37.3	-27.7	-54.7
Production	**2 188**	**2 264**	**1 920**	**2 051**	**2 273**	**1 392**	**1 532**	**2 104**	**10**	**-26**	**37**	**15**
Imports	182	147	253	168	152	176	205	236	16.3	24.0	15.1	28.9
Exports	624	709	821	804	820	602	608	760	1.1	-21.8	24.9	2.1
Availability	**2 069**	**2 232**	**2 135**	**2 092**	**2 220**	**1 636**	**1 538**	**1 877**	**-6**	**-28**	**22**	**-4**
Consumption	1 538	1 449	1 458	1 477	1 549	1 226	1 242	1 418	1.3	-15.0	14.2	1.9
ES+IT+EL+PT	1 259	1 124	1 112	1 133	1 202	934	941	1 105	0.8	-16.2	17.4	4.1
rest EU	279	324	346	343	348	292	300	313	2.9	-11.1	4.2	-5.1
Per capita consumption (kg)	3.5	3.3	3.3	3.3	3.5	2.7	2.8	3.1	0.8	-15.9	13.9	0.9
ES+IT+EL+PT	9.9	8.8	8.7	8.9	9.4	7.3	7.3	8.6	0.2	-16.6	17.0	3.3
Ending stocks	**531**	**784**	**677**	**616**	**671**	**410**	**297**	**458**	-27.7	-54.7	54.4	-19.0
Self-sufficiency rate (%)	*142*	*156*	*132*	*139*	*147*	*114*	*123*	*148*				

Note 1: the olive oil marketing year is October-September.
Note 2: Area and yield (of olives for oil) are reported per calendar year and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006).

WINE

TABLE 2.2 EU wine balance sheet (million hectolitres)

	EU								% variation			
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	23/24 vs 22/23	23/24 vs 5-yr. av.	24/25 vs 23/24	24/25 vs 5-yr. av.
Area (million ha)	3.2	3.2	3.2	3.2	3.2	3.2	3.2	3.1	-1.0	-1.5	-2.6	-3.9
Yield (hl/ha)	41.7	54.3	44.7	48.9	47.6	49.7	45.3	44.3	-8.9	-7.0	-2.2	-6.3
Vinified production	**134**	**174**	**144**	**157**	**153**	**159**	**143**	**137**	**-9.7**	**-8.2**	**-4.8**	**-9.8**
of which 5 main producing MS[1]	*119*	*157*	*130*	*143*	*138*	*145*	*130*	*125*	**-10.4**	**-8.4**	**-3.7**	**-8.5**
of which other EU MS	*15*	*18*	*14*	*14*	*15*	*14*	*14*	*11*	**-2.9**	**-7.5**	**-15.2**	**-19.1**
Domestic use	**128**	**129**	**125**	**130**	**132**	**126**	**134**	**120**	**6.8**	**4.6**	**-10.6**	**-7.1**
Human consumption	*103*	*104*	*100*	*97*	*103*	*97*	*96*	*93*	-0.9	-4.1	-2.9	-4.9
Per capita consumption (l)	*23.3*	*23.4*	*22.4*	*21.8*	*23.1*	*21.6*	*21.3*	*20.6*	-1.3	-5.1	-3.2	-6.0
other use	*25*	*25*	*25*	*33*	*29*	*29*	*38*	*27*	32.4	38.7	-29.7	-11.0
Imports	8	8	8	7	7	6	6	6	-5.2	-20.2	-0.4	-14.7
Exports	30	30	29	32	32	31	29	27	-7.1	-7.2	-5.7	-11.5
Ending stocks	**148**	**171**	**168**	**171**	**167**	**175**	**162**	**157**	**-7.8**	**-5.0**	**-3.0**	**-7.2**
Self-sufficiency rate (%)	*104*	*135*	*115*	*121*	*116*	*126*	*107*	*114*				

[1] *IT, FR, ES, DE, PT*
Note 1: the wine marketing year is August-July.
Note 2: Area and yield (of wine) are reported per calendar year and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006)

TABLE 2.3 EU apples balance sheet (thousand tonnes fresh equivalent)

	EU								% variation			
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	*23/24 vs 22/23*	*23/24 vs 5-yr. av.*	*24/25 vs 23/24*	*24/25 vs 5-yr. av.*
Area (1000 ha)	518	516	512	506	493	478	472	469	*-1.3*	*-6.2*	*-0.6*	*-4.7*
Yield (t/ha)	19	26	23	24	25	26	26	25	*-2.6*	*2.6*	*-3.5*	*-0.6*
Total production	**9 595**	**13 333**	**11 585**	**11 957**	**12 405**	**12 541**	**12 053**	**11 557**	***-3.9***	***-2.0***	***-4.1***	***-4.8***
of which losses and feed use	637	765	700	715	743	750	718	687	*-4.3*	*-2.5*	*-4.3*	*-5.3*
of which usable production	8 958	12 569	10 885	11 242	11 663	11 791	11 335	10 871	*-3.9*	*-2.0*	*-4.1*	*-4.8*
Production (fresh)	**6 306**	**7 843**	**7 528**	**7 828**	**7 342**	**6 953**	**6 814**	**6 634**	***-2.0***	***-9.9***	***-2.6***	***-8.8***
Exports (fresh)	916	1 398	1 162	1 101	1 141	1 034	949	951	*-8.2*	*-16.3*	*0.1*	*-12.9*
Imports (fresh)	412	361	383	327	313	230	249	271	*8.3*	*-25.3*	*8.9*	*-8.5*
Consumption (fresh)	6 115	6 409	6 964	6 938	6 442	6 356	6 000	6 066	*-5.6*	*-9.0*	*1.1*	*-7.8*
Per capita consumption (kg) - fresh	*14*	*14*	*16*	*15*	*14*	*14.2*	*13.3*	*13.4*	*-6.2*	*-9.8*	*1.0*	*-8.5*
Ending stocks[1]	*148*	*544*	*329*	*445*	*517*	*310*	*423*	*311*	*36.6*	*-1.7*	-	-
Change in stocks	*-312*	*396*	*-215*	*116*	*72*	*-207*	*113*	*-112*				
Self-sufficiency rate (fresh) %	*103*	*122*	*108*	*113*	*114*	*109*	*114*	*109*				
Production (processed)	**2 652**	**4 726**	**3 357**	**3 414**	**4 321**	**4 838**	**4 521**	**4 237**	***-6.6***	***8.8***	***-6.3***	***3.7***
Exports (processed)	995	1 926	1 343	1 015	1 448	1 467	1 246	1 027	*-15.0*	*-12.2*	*-17.6*	*-23.7*
Imports (processed)	1 673	1 158	1 225	1 110	929	946	1 224	1 675	*29.4*	*14.3*	*36.9*	*53.2*
Consumption (processed)	3 330	3 958	3 240	3 509	3 802	4 317	4 499	4 885	*4.2*	*19.8*	*8.6*	*26.0*
Per capita consumption (kg) - processed	*7*	*9*	*7*	*8*	*8*	*9.6*	*10.0*	*10.8*	*3.6*	*18.7*	*8.5*	*25.0*
Self-sufficiency rate (processed) %	*80*	*119*	*104*	*97*	*114*	*112*	*100*	*87*				

[1] stocks by the beginning of July.
Note 1: the apple marketing year is August-July.
Note 2: Area and yield (of apples) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006)
Note 3: trade of processed apples is expressed in fresh apple equivalent. The conversion coefficients used to convert processed products into fresh apple weight rates vary between 1.3 and 6.

TABLE 2.4 EU oranges balance sheet (thousand tonnes fresh equivalent)

	EU								% variation			
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025e	*23/24 vs 22/23*	*23/24 vs 5-yr. av.*	*24/25 vs 23/24*	*24/25 vs 5-yr. av.*
Area (1000 ha)	274	273	272	275	275	277	277	279	*0.0*	*1.0*	*0.7*	*1.1*
Yield (t/ha)	23	24	22	23	24	21	21	21	*-2.7*	*-10.9*	*3.9*	*-3.7*
Total production	**6 252**	**6 515**	**6 102**	**6 389**	**6 586**	**5 881**	**5 721**	**5 984**	***-2.7***	***-9.7***	***4.6***	***-2.3***
Production (fresh)	**5 098**	**5 206**	**5 254**	**5 363**	**5 475**	**5 208**	**5 022**	**5 018**	***-3.6***	***-4.8***	***-0.1***	***-4.9***
Exports (fresh)	443	494	417	411	403	343	308	324	*-10.2*	*-24.9*	*5.2*	*-15.9*
Imports (fresh)	909	881	960	859	734	1 045	942	908	*-9.9*	*4.6*	*-3.6*	*-1.4*
Consumption (fresh)	5 564	5 593	5 797	5 811	5 807	5 911	5 656	5 602	*-4.3*	*-2.6*	*-1.0*	*-3.5*
Per capita consumption (kg) - fresh	*12.5*	*12.6*	*13.0*	*13.0*	*13.0*	*13.2*	*12.5*	*12.4*	*-4.8*	*-3.6*	*-1.2*	*-4.8*
Self-sufficiency rate (fresh) %	*92*	*93*	*91*	*92*	*94*	*88*	*89*	*90*				
Production (processed)	**1 154**	**1 309**	**848**	**1 026**	**1 111**	**673**	**699**	**966**	***3.9***	***-29.7***	***38.2***	***12.6***
Exports (processed)	2 189	2 152	2 259	1 509	1 169	1 126	1 071	962	*-4.9*	*-33.5*	*-10.1*	*-24.1*
Imports (processed)	4 518	4 302	4 262	3 580	3 204	2 933	2 624	1 679	*-10.5*	*-28.7*	*-36.0*	*-48.2*
Consumption (processed)	3 483	3 459	2 851	3 097	3 146	2 480	2 252	1 683	*-9.2*	*-25.7*	*-25.3*	*-40.1*
Per capita consumption (kg) - processed	*7.8*	*7.8*	*6.4*	*6.9*	*7.1*	*5.5*	*5.*	*3.7*	*-9.6*	*-26.5*	*-25.5*	*-40.8*
Self-sufficiency rate (processed) %	*33*	*38*	*30*	*33*	*35*	*27*	*31*	*57*				

Note 1: the oranges marketing year is October-September.Note 2: Area and yield (of oranges) are reported per calendar year, and attributed to the corresponding marketing year starting in a given year (e.g. 2005 = marketing year 2005/2006);
Note 3: trade of processed oranges is estimated using conversion coefficients into fresh equivalent. Conversion coefficients used to convert processed products into fresh oranges weights vary between 0.3 and 12.

TABLE 2.5 EU peaches and nectarines balance sheet (thousand tonnes fresh equivalent)

	EU							% variation			
	2019	2020	2021	2022	2023	2024	2025e	24/23	2024 vs 5-yr. av.	25/24	2025 vs 5-yr. av.
Total area (1000 ha)	207	203	194	190	185	192	190	4.3	-1.8	-1.5	-1.4
Total Yield (t/ha)	20	17	16	17	18	18	17	-1.0	1.2	-4.4	-2.9
Total production	**4 049**	**3 546**	**3 067**	**3 260**	**3 299**	**3 406**	**3 208**	**3.2**	**1.1**	**-5.8**	**-3.4**
Area (1000 ha) - fresh	178	175	170	164	164	172	169	4.8	1.3	-1.7	0.2
Yield (t/ha) - fresh	19	16	15	16	18	17	17	-2.2	3.0	-3.9	-0.2
Production (fresh)	**3 330**	**2 863**	**2 582**	**2 649**	**2 879**	**2 953**	**2 790**	**2.6**	**5.6**	**-5.5**	**-0.2**
of which IT, EL, ES and FR	*3 205*	*2 779*	*2 499*	*2 559*	*2 804*	2 875	2 717	2.5	5.9	-5.5	0.1
Exports (fresh)	259	180	137	125	139	142	136	2.4	-6.7	-4.4	-2.5
Imports (fresh)	24	39	43	41	48	59	62	23.3	43.3	6.5	42.6
Consumption (fresh)	3 095	2 721	2 488	2 564	2 788	2 870	2 717	2.9	6.6	-5.3	1.0
Per capita consumption (kg) - fresh	*6.9*	*6.1*	*5.6*	*5.7*	*6.2*	*6.3*	*6.0*	2.8	6.1	-5.1	0.7
Self-sufficiency rate (fresh) %	*108*	*105*	*104*	*103*	*103*	*103*	*103*				
Area (1000 ha) - processed	29	29	25	26	21	21	21	0.0	-21.5	0.0	-12.7
Yield (t/ha) - processed	25	24	20	24	20	22	20	7.8	-3.0	-8.0	-8.1
Production (processed)	**718**	**683**	**486**	**611**	**420**	**453**	**417**	**7.8**	**-23.6**	**-8.0**	**-19.2**
of which EL and ES	*695*	*667*	*466*	*590*	*409*	*436*	*399*	6.4	-24.1	-8.5	-19.8
Exports (processed)	184	205	170	143	151	158	138	4.9	-5.9	-12.6	-13.4
Imports (processed)	10	9	11	15	19	19	16	-0.1	55.3	-12.8	8.3
Consumption (processed)	**544**	**488**	**327**	**483**	**288**	**313**	**295**	**8.9**	**-27.5**	**-5.9**	**-21.2**
Per capita consumption (kg) - processed	*1.2*	*1.1*	*0.7*	*1.1*	*0.6*	*0.7*	*0.7*	8.7	-28.1	-5.7	-21.4
Self-sufficiency rate (processed) %	*132*	*140*	*149*	*127*	*146*	*145*	*141*				

Note 1: the peaches and nectarines marketing year is January-December (calendar year).
Note 2: trade of processed peaches is expressed in fresh peach equivalent. The conversion coefficient is 1 for all processed products, but 6 for dried peaches and nectarines.

TABLE 2.6 EU tomatoes balance sheet (thousand tonnes fresh equivalent)

	EU							% variation			
	2019	2020	2021	2022	2023	2024	2025e	24/23	2024 vs 5-yr. av.	25/24	2025 vs 5-yr. av.
Total production	**17 277**	**16 901**	**18 770**	**16 200**	**16 698**	**16 868**	**16 423**	**1.0**	**-0.5**	**-2.6**	**-2.4**
Production (fresh)	**6 934**	**6 907**	**6 954**	**6 348**	**6 183**	**5 681**	**5 650**	**-8.1**	**-15.6**	**-0.5**	**-12.8**
Exports (fresh)	461	442	378	357	347	375	384	8.1	-4.3	2.4	3.9
Imports (fresh)	583	621	705	795	804	835	847	3.9	18.1	1.5	10.3
Consumption (fresh)	7 056	7 086	7 281	6 786	6 640	6 140	6 113	-7.5	-12.0	-0.4	-10.6
Per capita consumption (kg) - fresh	*15.8*	*15.8*	*16.3*	*15.1*	*14.7*	*13.6*	*13.6*	-7.6	-12.7	-0.2	-10.9
Self-sufficiency rate (fresh) %	*98*	*97*	*96*	*94*	*93*	*93*	*92*				
Production (processed)	**10 343**	**9 994**	**11 816**	**9 852**	**10 515**	**11 187**	**10 773**	**6.4**	**8.8**	**-3.7**	**2.0**
of which ES,IT, PT	9 411	9 078	10 840	9 015	9 504	9 852	9 550	3.7	5.6	-3.1	0.8
of which other EU countries	932	916	976	837	1 011	1 335	1 223	32.1	41.8	-8.4	26.4
Exports (processed)	4 618	4 743	4 499	4 481	3 788	4 065	3 846	7.3	-10.3	-5.4	-11.6
Imports (processed)	1 930	2 141	2 746	2 324	2 750	2 811	2 316	2.2	16.9	-17.6	-11.2
Consumption (processed)1	7 655	7 391	10 064	7 694	9 477	9 933	9 243	4.8	20.0	-7.0	2.3
Per capita consumption (kg) - processed	*17.1*	*16.5*	*22.5*	*17.1*	*21.*	*22.0*	*20.5*	4.7	19.4	-6.7	2.3
Self-sufficiency rate (processed) %	*135*	*135*	*117*	*128*	*111*	*113*	*117*				

[1] consumption also includes stock variation.
Note 1: the tomatoes marketing year is January-December (calendar year).
Note 2: trade of processed tomatoes is expressed in fresh tomato equivalent. Conversion coefficients used to convert processed products into fresh tomato weights vary between 1.13 and.19.5.

DAIRY

TABLE 3.1 EU milk supply and utilisation

	EU							% variation				
	2019	2020	2021	2022	2023	2024e	2025f	21/20	22/21	23/22	24/23	25/24
Dairy cows (million heads)[1]	**20.5**	**20.2**	**19.9**	**19.8**	**19.6**	**18.9**	**18.8**	***-1.5***	***-0.7***	***-0.8***	***-3.5***	***-1.0***
Milk yield (kg/dairy cow)[2]	**7 304**	**7 484**	**7 578**	**7 643**	**7 746**	**8 084**	**8 177**	***1.3***	***0.9***	***1.4***	***4.4***	***1.2***
Cow milk production (million t)	**152.2**	**154.0**	**153.6**	**153.8**	**154.7**	**155.6**	**155.8**	***-0.3***	***0.2***	***0.6***	***0.6***	***0.1***
Feed use (million t)	3.3	3.3	3.1	3.1	2.8	2.8	2.8	-5.7	-0.1	-10.3	0.0	0.0
On farm use and direct sales (million t)	6.2	5.8	5.8	5.9	7.1	7.1	7.1	-0.5	1.9	20.5	0.0	0.0
Delivered to dairies (million t)	**142.6**	**144.9**	**144.6**	**144.8**	**144.7**	**145.7**	**145.9**	***-0.2***	***0.1***	***0.0***	***0.7***	***0.2***
Delivery ratio (%)[3]	**93.7**	**94.1**	**94.2**	**94.1**	**93.6**	**93.6**	**93.6**	***0.1***	***-0.1***	***-0.6***	***0.0***	***0.0***
Fat content of milk (%)	4.1	4.1	4.1	4.1	4.1	4.2	4.2	0.5	-0.3	1.0	0.5	0.2
Protein content of milk (%)	3.5	3.5	3.5	3.4	3.5	3.5	3.5	-0.1	-0.2	0.6	0.2	0.1

[1] Dairy cow numbers refer to the end of the year (historical figures from the December cattle survey).
[2] Milk yield is dairy cow production per dairy cows (milk from dairy cows represent around 98% of EU total cow milk production).
[3] Delivery ratio is milk delivered to dairies per total production.
Note: due to confidentiality of reported data by Luxembourg it has been removed from the EU aggregates. This is valid only for dairy balance sheets.

TABLE 3.2 EU cheese balance sheet (thousand tonnes)

	EU							% variation				
	2019	2020	2021	2022	2023	2024e	2025f	21/20	22/21	23/22	24/23	25/24
Production (in dairies)	**10 045**	**10 252**	**10 417**	**10 423**	**10 551**	**10 795**	**10 871**	***1.6***	***0.1***	***1.2***	***2.3***	***0.7***
of which from pure cow's milk	9 164	9 333	9 445	9 493	9 619	9 863	9 939	1.2	0.5	1.3	2.5	0.8
of which from other milk[1]	881	919	972	930	932	932	932	5.8	-4.3	0.2	0.0	0.0
Processed cheese impact[2]	394	382	388	379	379	381	381	1.5	-2.2	0.0	0.4	0.0
Total production	**10 439**	**10 634**	**10 804**	**10 802**	**10 930**	**11 176**	**11 252**	***1.6***	***0.0***	***1.2***	***2.2***	***0.7***
Imports[3]	**212**	**223**	**196**	**187**	**174**	**187**	**196**	***-11.8***	***-4.8***	***-7.1***	***7.7***	***5.0***
Exports	**1 348**	**1 402**	**1 385**	**1 327**	**1 386**	**1 388**	**1 389**	***-1.2***	***-4.2***	***4.4***	***0.1***	***0.1***
Domestic use[4]	**9 303**	**9 439**	**9 631**	**9 722**	**9 718**	**9 975**	**10 059**	***2.0***	***0.9***	***0.0***	***2.6***	***0.8***
Change in stocks	0	15	- 15	- 60	0	0	0					
Processing use	331	319	325	316	316	318	318	1.8	-2.6	0.0	0.5	0.1
Human consumption	8 972	9 121	9 306	9 406	9 402	9 657	9 741	2.0	1.1	0.0	2.7	0.9
per capita consumption (kg)	*20.1*	*20.4*	*20.9*	*21.*	*20.9*	*21.4*	*21.5*	2.1	0.4	-0.5	2.4	0.6
Self-sufficiency rate (%)	*112*	*113*	*112*	*111*	*112*	*112*	*112*					

[1] Other milk includes goat, ewe and buffalo milk.
[2] Processed cheese impact includes production and net exports of processed cheese.
[3] Imports and exports include processed cheese.
[4] Domestic use includes stock changes.
Note: the figures on production were updated with the update of Eurostat database on 20th September 2022.

TABLE 3.3 EU fresh dairy products balance sheet (thousand tonnes)

	EU							% variation				
	2019	2020	2021	2022	2023	2024e	2025f	21/20	22/21	23/22	24/23	25/24
Production	**37 802**	**38 308**	**37 930**	**37 030**	**36 763**	**36 792**	**36 495**	***-1.0***	***-2.4***	***-0.7***	***0.1***	***-0.8***
of which Drinking Milk	23 359	23 916	23 205	22 483	22 201	22 411	22 075	-3.0	-3.1	-1.3	0.9	-1.5
of which Cream	2 468	2 483	2 527	2 538	2 570	2 667	2 680	1.8	0.5	1.2	3.8	0.5
of which Acidified Milk	7 663	7 732	7 707	7 688	7 810	8 066	8 107	-0.3	-0.2	1.6	3.3	0.5
of which other Fresh Products[1]	4 311	4 178	4 491	4 320	4 181	3 648	3 633	7.5	-3.8	-3.2	-12.7	-0.4
Imports	**825**	**754**	**624**	**732**	**754**	**798**	**798**	***-17.1***	***17.3***	***3.0***	***5.9***	***0.0***
Exports	**1 649**	**1 781**	**1 988**	**1 613**	**1 541**	**1 823**	**1 878**	***11.6***	***-18.8***	***-4.5***	***18.3***	***3.0***
Consumption[2]	**36 978**	**37 281**	**36 566**	**36 149**	**35 976**	**35 768**	**35 415**	***-1.9***	***-1.1***	***-0.5***	***-0.6***	***-1.0***
per capita consumption (kg)	*82.8*	*83.6*	*82.0*	*80.6*	*79.8*	*79.1*	*78.1*	-1.9	-1.8	-1.0	-0.9	-1.2
Self-sufficiency rate (%)	*102*	*103*	*104*	*102*	*102*	*103*	*103*					

[1] Includes buttermilk, drinks with milk base and other fresh commodities.
[2] Consumption includes stock changes.
Note 1: The figures on imports and exports are referring to total trade, i.e. including inward processing.
Note2: The figures on production were updated with the update of Eurostat database on 20th September 2022.

TABLE 3.4 EU whole milk powder balance sheet (thousand tonnes)

	EU							% variation				
	2019	2020	2021	2022	2023	2024e	2025f	21/20	22/21	23/22	24/23	25/24
Production	**710**	**728**	**629**	**595**	**584**	**561**	**551**	*-13.6*	*-5.3*	*-2.0*	*-3.9*	*-1.7*
Imports	**42**	**27**	**11**	**20**	**18**	**16**	**16**	*-59.2*	*76.1*	*-8.8*	*-13.1*	*0.0*
Exports	**315**	**345**	**298**	**234**	**260**	**209**	**198**	*-13.5*	*-21.7*	*11.4*	*-19.8*	*-5.0*
Domestic use[1]	**437**	**411**	**342**	**381**	**341**	**368**	**369**	*-16.8*	*11.6*	*-10.5*	*7.7*	*0.3*
Self-sufficiency rate (%)	*163*	*177*	*184*	*156*	*171*	*153*	*150*					

[1] *Domestic use includes stock changes.*
Note: the figures on production were updated with the update of Eurostat database on 20th September 2022.

TABLE 3.5 EU skimmed milk powder balance sheet (thousand tonnes)

	EU							% variation				
	2019	2020	2021	2022	2023	2024e	2025f	21/20	22/21	23/22	24/23	25/24
Production	**1 473**	**1 494**	**1 409**	**1 492**	**1 470**	**1 440**	**1 425**	*-5.7*	*5.9*	*-1.5*	*-2.1*	*-1.0*
Imports	**56**	**36**	**32**	**36**	**36**	**41**	**41**	*-11.9*	*13.8*	*-0.6*	*13.8*	*0.0*
Exports	**945**	**831**	**788**	**707**	**775**	**718**	**703**	*-5.2*	*-10.3*	*9.7*	*-7.5*	*-2.0*
Domestic use[1]	**805**	**699**	**673**	**761**	**766**	**763**	**763**	*-3.7*	*13.1*	*0.6*	*-0.3*	*0.0*
Ending stocks	**90**	**90**	**70**	**130**	**95**	**95**	**95**					
Private	90	90	70	130	95	95	95					
Public (intervention)	0	0	0	0	0	0	0					
Change in stocks	- 221	0	- 20	60	- 35	0	0					
Self-sufficiency rate (%)	*183*	*214*	*209*	*196*	*192*	*189*	*187*					

[1] *Domestic use includes stock changes.*
Note: the figures on production were updated with the update of Eurostat database on 20th September 2022.

TABLE 3.6 EU butter market balance sheet (thousand tonnes)

	EU							% variation				
	2019	2020	2021	2022	2023	2024e	2025f	21/20	22/21	23/22	24/23	25/24
Production	**2 346**	**2 400**	**2 322**	**2 297**	**2 334**	**2 310**	**2 317**	*-3.2*	*-1.1*	*1.6*	*-1.0*	*0.3*
Imports	**48**	**34**	**33**	**57**	**44**	**28**	**30**	*-3.9*	*73.9*	*-23.3*	*-35.1*	*5.0*
Exports	**283**	**303**	**254**	**245**	**280**	**268**	**263**	*-16.1*	*-3.4*	*14.2*	*-4.3*	*-2.0*
Domestic use[1]	**2 096**	**2 131**	**2 101**	**2 093**	**2 098**	**2 070**	**2 084**	*-1.4*	*-0.4*	*0.2*	*-1.3*	*0.7*
per capita consumption (kg)	*4.7*	*4.8*	*4.7*	*4.7*	*4.7*	*4.6*	*4.6*	-1.4	-1.0	-0.3	-1.6	0.5
Ending stocks	**135**	**135**	**135**	**150**	**150**	**150**	**150**					
Private	135	135	135	150	150	150	150					
Public (intervention)	0	0	0	0	0	0	0					
Change in stocks	15	0	0	15	0	0	0					
Self-sufficiency rate (%)	*112*	*113*	*111*	*110*	*111*	*112*	*111*					

[1] *Domestic use includes stock changes.*
Note 1: Data refer to butter, butter oil and other yellow fat products expressed in butter equivalent. Figures on imports and exports do not include inward/outward processing.
In June 2021, trade data was revised by applying coefficients on EU-UK inward/outward processing flows which were not reported in intra-EU trade. Details are in STO methodology.
Note 2: the figures on production were updated with the update of Eurostat database on 20th September 2022.

TABLE 3.7 EU whey market balance sheet (thousand tonnes)

	EU							% variation				
	2019	2020	2021	2022	2023	2024e	2025f	21/20	22/21	23/22	24/23	25/24
Production	**2 099**	**2 119**	**2 177**	**2 202**	**2 042**	**2 063**	**2 077**	*2.8*	*1.1*	*-7.3*	*1.0*	*0.7*
Imports	**69**	**52**	**42**	**47**	**44**	**46**	**46**	*-19.3*	*12.8*	*-6.7*	*3.7*	*0.0*
Exports	**638**	**692**	**715**	**661**	**691**	**742**	**757**	*3.3*	*-7.5*	*4.5*	*7.4*	*2.0*
Domestic use[1]	**1 530**	**1 478**	**1 504**	**1 588**	**1 395**	**1 367**	**1 366**	*1.8*	*5.6*	*-12.2*	*-2.0*	*-0.1*
Self-sufficiency rate (%)	*137*	*143*	*145*	*139*	*146*	*151*	*152*					

[1] *Domestic use includes stock changes.*
Note: the figures on production were updated with the update of Eurostat database on 20th September 2022.

MEAT

TABLE 4.1 EU aggregate meat balance sheet (thousand tonnes carcass weight equivalent)

	EU							% variation				
	2019	2020	2021	2022	2023	2024	2025e	21/20	22/21	23/22	24/23	25/24
Gross Indigenous Production	**44 352**	**44 599**	**44 624**	**42 936**	**41 540**	**42 808**	**42 860**	***0.1***	***-3.8***	***-3.3***	***3.1***	***0.1***
Live Imports	11	11	10	9	7	7	7					
Live Exports	352	326	328	305	329	295	278	0.6	-7.0	7.7	-10.2	-5.9
Net Production	**44 011**	**44 284**	**44 306**	**42 640**	**41 218**	**42 520**	**42 589**	***0.0***	***-3.8***	***-3.3***	***3.2***	***0.2***
Meat Imports	**1 560**	**1 329**	**1 221**	**1 397**	**1 430**	**1 443**	**1 538**	***-8.1***	***14.4***	***2.4***	***0.9***	***6.6***
Meat Exports	**7 309**	**7 940**	**7 501**	**6 481**	**5 413**	**5 560**	**5 489**	***-5.5***	***-13.6***	***-16.5***	***2.7***	***-1.3***
Domestic use	**38 261**	**37 672**	**38 025**	**37 556**	**37 235**	**38 403**	**38 639**	***0.9***	***-1.2***	***-0.9***	***3.1***	***0.6***
Per capita consumption [1] (kg)	*68.4*	*67.5*	*68.1*	*66.9*	*66.2*	*68.1*	*68.4*	0.9	-1.7	-1.1	2.9	0.5
Self-sufficiency (%)	*116*	*118*	*117*	*114*	*112*	*111*	*111*					

[1] In retail weight. Coefficients to transform carcass weight into retail weight are: 0.7 for beef and veal meat; 0.78 for pigmeat; 0.88 for both poultry meat, and sheep and goat meat.
Note: Meat production data excludes the offal and fat categories (with the exception of pork lard).

TABLE 4.2 EU beef and veal balance sheet (thousand tonnes carcass weight equivalent)

	EU							% variation				
	2019	2020	2021	2022	2023	2024	2025e	21/20	22/21	23/22	24/23	25/24
Gross Indigenous Production	**7 197**	**7 136**	**7 099**	**6 921**	**6 679**	**6 836**	**6 731**	***-0.5***	***-2.5***	***-3.5***	***2.3***	***-1.5***
Live Imports	2	2	1	1	0	0	0					
Live Exports	236	235	218	200	217	180	162	-7.4	-8.2	8.7	-17.3	-10.0
Net Production	**6 964**	**6 903**	**6 883**	**6 722**	**6 462**	**6 656**	**6 570**	***-0.3***	***-2.3***	***-3.9***	***3.0***	***-1.3***
Meat Imports	**387**	**306**	**284**	**328**	**325**	**351**	**369**	***-7.1***	***15.2***	***-1.0***	***8.3***	***5.0***
Meat Exports	**577**	**593**	**567**	**517**	**525**	**572**	**549**	***-4.3***	***-8.9***	***1.7***	***8.9***	***-4.0***
Domestic use	**6 774**	**6 617**	**6 600**	**6 533**	**6 261**	**6 436**	**6 390**	***-0.3***	***-1.0***	***-4.2***	***2.8***	***-0.7***
per capita consumption (kg)	*10.6*	*10.4*	*10.4*	*10.2*	*9.7*	*10.0*	*9.9*	-0.2	-1.6	-4.6	2.5	-0.9
Self-sufficiency (%)	*106*	*108*	*108*	*106*	*107*	*106*	*105*					

[1] In retail weight. Coefficients to transform carcass weight into retail weight are 0.7 for beef and veal meat.

TABLE 4.3 EU pigmeat balance sheet (thousand tonnes carcass weight equivalent)

	EU							% variation				
	2019	2020	2021	2022	2023	2024	2025e	21/20	22/21	23/22	24/23	25/24
Gross Indigenous Production	**23 039**	**23 240**	**23 658**	**22 321**	**20 876**	**21 299**	**21 207**	***1.8***	***-5.7***	***-6.5***	***2.0***	***-0.4***
Live Imports	1	1	2	1	1	1	1					
Live Exports	43	23	45	45	48	57	57	97.4	0.0	6.7	20.6	0.0
Net Production	**22 996**	**23 219**	**23 615**	**22 277**	**20 829**	**21 242**	**21 150**	***1.7***	***-5.7***	***-6.5***	***2.0***	***-0.4***
Meat Imports	**162**	**159**	**97**	**121**	**108**	**100**	**101**	***-38.8***	***24.8***	***-10.7***	***-7.9***	***1.0***
Meat Exports	**4 177**	**4 944**	**4 752**	**3 993**	**3 017**	**2 944**	**2 856**	***-3.9***	***-16.0***	***-24.4***	***-2.4***	***-3.0***
Domestic use	**18 981**	**18 434**	**18 960**	**18 406**	**17 921**	**18 398**	**18 395**	***2.9***	***-2.9***	***-2.6***	***2.7***	***0.0***
per capita consumption (kg)	*33.2*	*32.2*	*33.2*	*32.0*	*31.0*	*31.7*	*31.7*	2.9	-3.5	-3.1	2.4	-0.2
Self-sufficiency (%)	*121*	*126*	*125*	*121*	*116*	*116*	*115*					

[1] In retail weight. Coefficients to transform carcass weight into retail weight are 0.78 for pigmeat.

TABLE 4.4 EU poultry meat balance sheet (thousand tonnes carcass weight equivalent)

	EU							% variation				
	2019	2020	2021	2022	2023	2024	2025e	21/20	22/21	23/22	24/23	25/24
Gross Indigenous Production	**13 470**	**13 595**	**13 238**	**13 069**	**13 393**	**14 097**	**14 356**	***-2.6***	***-1.3***	***2.5***	***5.3***	***1.8***
Live Imports	3	4	4	3	3	3	3					
Live Exports	10	8	13	7	7	7	7	*56.5*	*-46.9*	*0.5*	*6.1*	*0.0*
Net Production	**13 463**	**13 590**	**13 229**	**13 066**	**13 389**	**14 093**	**14 351**	***-2.7***	***-1.2***	***2.5***	***5.3***	***1.8***
Meat Imports	**849**	**710**	**713**	**793**	**838**	**836**	**903**	***0.4***	***11.2***	***5.8***	***-0.2***	***8.0***
Meat Exports	**2 499**	**2 346**	**2 135**	**1 927**	**1 833**	**2 011**	**2 051**	***-9.0***	***-9.7***	***-4.9***	***9.7***	***2.0***
Domestic use	**11 813**	**11 955**	**11 806**	**11 931**	**12 395**	**12 918**	**13 203**	***-1.2***	***1.1***	***3.9***	***4.2***	***2.2***
per capita consumption (kg)	*23.3*	*23.6*	*23.3*	*23.4*	*24.2*	*25.1*	*25.6*	*-1.2*	*0.4*	*3.4*	*3.9*	*2.0*
Self-sufficiency (%)	*114*	*114*	*112*	*110*	*108*	*109*	*109*					

[1] In retail weight. Coefficients to transform carcass weight into retail weight are 0.88 for poultry meat.

TABLE 4.5 EU sheep and goat meat balance sheet (thousand tonnes carcass weight equivalent)

	EU							% variation				
	2019	2020	2021	2022	2023	2024	2025e	21/20	22/21	23/22	24/23	25/24
Gross Indigenous Production	**646**	**628**	**630**	**625**	**592**	**576**	**566**	***0.3***	***-0.7***	***-5.3***	***-2.7***	***-1.7***
Live Imports	4	4	3	3	3	3	3					
Live Exports	62	61	53	54	57	51	51	*-12.0*	*1.2*	*5.7*	*-10.9*	*1.0*
Net Production	**588**	**571**	**580**	**575**	**538**	**528**	**518**	***1.5***	***-0.8***	***-6.4***	***-1.8***	***-2.0***
of which on-farm slaughterings	*103.2*	*106.0*	*108.1*	*106.9*	*100.4*	*118.9*	*118.9*	*2.0*	*-1.1*	*-6.0*	*18.4*	*0.0*
Meat Imports	**162**	**153**	**126**	**155**	**159**	**156**	**165**	***-17.6***	***22.8***	***2.4***	***-1.7***	***6.0***
Meat Exports	**56**	**58**	**47**	**44**	**38**	**33**	**33**	***-19.2***	***-6.0***	***-13.0***	***-13.9***	***-1.0***
Domestic use	**694**	**667**	**659**	**686**	**658**	**651**	**650**	***-1.1***	***4.0***	***-4.0***	***-1.1***	***-0.1***
per capita consumption (kg)	*1.4*	*1.3*	*1.3*	*1.3*	*1.3*	*1.3*	*1.3*	*-1.1*	*3.4*	*-4.5*	*-1.4*	*-0.4*
Self-sufficiency (%)	*93*	*94*	*95*	*91*	*90*	*88*	*87*					

[1] In retail weight. Coefficients to transform carcass weight into retail weight are 0.88 for sheep and goat meat.
Note: Before 2009, Slovenia, Belgium, Malta, Portugal and Sweden did not report the on-farm slaughtering data.

TABLE 5.1 EU self-sufficiency rate (%)

Crop sectors	EU								
	2017	2018	2019	2020	2021	2022	2023	2024	2025
Arable crops									
Total cereals	108	103	113	108	113	105	105	99	109
Soft wheat	126	113	137	127	136	128	124	110	125
Durum	93	93	83	82	89	82	83	80	89
Barley	113	122	126	122	122	123	115	117	125
Maize	88	84	83	84	90	71	80	78	83
Rye	104	99	114	102	104	97	98	93	103
Sorghum	82	95	152	62	71	46	71	109	86
Oats	103	100	105	114	102	100	91	119	117
Triticale	96	98	121	103	100	97	98	89	101
Others	83	80	99	98	97	92	91	93	119
Oilseeds	68	63	57	56	60	60	65	58	61
Oilmeals	59	61	62	63	63	64	63	59	63
Vegetable oils	70	68	66	72	71	77	75	82	84
Protein crops	93	79	82	82	79	78	79	83	81
Sugar *	112	95	97	91	98	93	102	106	-
Specialised crops									
Olive oil	142	156	132	139	147	114	123	148	-
Wine	104	133	114	120	116	126	107	114	-
Apples (processed)	80	119	104	97	114	112	100	87	-
Apples (fresh)	103	122	108	113	114	109	114	109	-
Oranges(processed)	33	38	30	33	35	27	31	57	-
Oranges (fresh)	92	93	91	92	94	88	89	90	-
Peaches & Nectarines (processed)	128	128	132	140	149	127	146	145	141
Peaches & Nectarines (fresh)	110	107	108	105	104	103	103	103	103
Tomatoes (processed)	125	136	135	135	117	128	111	113	117
Tomatoes (fresh)	100	99	98	97	96	94	93	93	92

** EU + UK for the period 2017-2019.*
Note: Figures for arable crops, olive oil and wine refer to marketing years (20XX means 20XX/20XX+1).

Animal sectors	EU								
	2017	2018	2019	2020	2021	2022	2023	2024	2025
Dairy products									
Cheese	112	112	112	113	112	111	112	112	112
Fresh dairy products	102	101	102	103	104	102	102	103	103
WMP	198	177	163	177	184	156	171	153	150
SMP	192	178	183	214	209	196	192	189	187
Butter	109	110	112	113	111	110	111	112	111
Whey	139	140	137	143	145	139	146	151	152
Meat									
Total Meat	114	114	116	118	117	114	112	111	111
Beef/veal	108	107	106	108	108	106	107	106	105
Pigmeat	117	118	121	126	125	121	116	116	115
Poultry meat	112	113	114	114	112	110	108	109	109
Sheep and goat meat	91	90	93	94	95	91	90	88	87

TABLE 5.2 Share of EU exports by destination (volume)

		CEREALS	Soft wheat	Barley	Maize	SUGAR	MEAT OFFAL LIVE	Beef	Pork	Poultry	INFANT FORMULA	DAIRY PRODUCTS	Cheese and curd	SMP and WMP	Whey powder	OLIVE OIL	WINE	Apples (fresh)	Apples (processed)	Oranges (fresh)	Oranges (processed)	Peaches & Nectarines (fresh)	Peaches & Nectarines (processed)	Tomatoes (fresh)	Tomatoes (processed)
								meat, offal, live animals																	
China	2023	**11%**	3%	38%	12%	**0%**	**16%**	1%	27%	0%	**34%**	**16%**	2%	8%	29%	**2%**	**6%**	0%	1%	1%	8%	0%	0%	0%	0%
	2024	**8%**	6%	19%	2%	**0%**	**15%**	0%	26%	0%	**31%**	**14%**	2%	5%	29%	**3%**	**5%**	0%	2%	1%	5%	0%	0%	0%	1%
	2025Jan-Mar	**0%**	0%	1%	0%	**0%**	**16%**	0%	27%	0%	**31%**	**13%**	2%	4%	27%	**3%**	**4%**	0%	2%	1%	1%	0%	0%	0%	0%
ASEAN	2023	**5%**	7%	4%	0%	**0%**	**9%**	3%	12%	4%	**4%**	**11%**	2%	16%	36%	**2%**	**1%**	2%	1%	0%	1%	1%	6%	0%	1%
	2024	**4%**	4%	5%	0%	**1%**	**10%**	3%	14%	6%	**4%**	**11%**	2%	16%	37%	**2%**	**2%**	2%	1%	0%	1%	1%	4%	0%	1%
	2025Jan-Mar	**1%**	0%	3%	0%	**1%**	**11%**	2%	15%	6%	**4%**	**13%**	2%	24%	36%	**2%**	**2%**	2%	2%	0%	1%	0%	1%	0%	1%
North Africa	2023	**27%**	32%	16%	14%	**3%**	**1%**	6%	0%	0%	**8%**	**8%**	6%	27%	4%	**1%**	**1%**	13%	3%	1%	3%	1%	4%	0%	7%
	2024	**27%**	30%	21%	6%	**10%**	**2%**	9%	0%	0%	**8%**	**8%**	6%	31%	4%	**1%**	**1%**	15%	3%	1%	3%	3%	5%	0%	9%
	2025Jan-Mar	**38%**	43%	35%	5%	**11%**	**2%**	10%	0%	1%	**7%**	**7%**	6%	19%	3%	**1%**	**1%**	20%	4%	0%	4%	1%	4%	0%	9%
Other Africa	2023	**26%**	35%	10%	2%	**10%**	**13%**	9%	6%	31%	**6%**	**11%**	2%	11%	3%	**1%**	**6%**	2%	2%	1%	3%	1%	0%	0%	5%
	2024	**29%**	38%	11%	3%	**22%**	**14%**	10%	7%	32%	**6%**	**11%**	2%	11%	3%	**1%**	**7%**	2%	2%	1%	5%	1%	0%	0%	5%
	2025Jan-Mar	**23%**	32%	10%	3%	**24%**	**15%**	11%	7%	35%	**5%**	**13%**	2%	14%	5%	**1%**	**7%**	3%	1%	1%	4%	1%	1%	0%	5%
Middle East	2023	**9%**	8%	9%	17%	**21%**	**4%**	9%	1%	6%	**16%**	**13%**	10%	21%	4%	**2%**	**1%**	19%	7%	4%	3%	1%	8%	2%	6%
	2024	**11%**	7%	19%	24%	**26%**	**4%**	8%	1%	7%	**16%**	**12%**	10%	22%	4%	**2%**	**1%**	19%	8%	4%	7%	0%	8%	2%	5%
	2025Jan-Mar	**17%**	11%	29%	32%	**33%**	**4%**	10%	0%	6%	**15%**	**11%**	10%	20%	5%	**4%**	**1%**	21%	10%	4%	7%	1%	9%	0%	5%
US Mexico Canada	2023	**2%**	2%	3%	1%	**1%**	**3%**	3%	4%	0%	**4%**	**3%**	12%	0%	1%	**44%**	**30%**	0%	27%	4%	5%	0%	42%	0%	8%
	2024	**2%**	1%	4%	1%	**1%**	**3%**	3%	4%	0%	**5%**	**3%**	13%	0%	0%	**43%**	**30%**	0%	15%	4%	7%	0%	44%	0%	10%
	2025Jan-Mar	**1%**	0%	2%	0%	**0%**	**3%**	3%	4%	1%	**5%**	**3%**	13%	0%	1%	**46%**	**30%**	0%	20%	2%	7%	0%	45%	0%	11%
UK	2023	**4%**	2%	2%	17%	**33%**	**27%**	37%	21%	37%	**10%**	**16%**	31%	3%	6%	**11%**	**23%**	18%	43%	26%	46%	39%	14%	73%	39%
	2024	**8%**	7%	3%	35%	**10%**	**26%**	34%	21%	35%	**11%**	**19%**	31%	3%	6%	**9%**	**23%**	19%	52%	26%	39%	40%	13%	73%	37%
	2025Jan-Mar	**7%**	5%	2%	40%	**10%**	**25%**	36%	18%	35%	**13%**	**16%**	32%	3%	6%	**9%**	**23%**	21%	45%	22%	41%	39%	17%	67%	36%

Source: COMEXT-Eurostat.

Group definitions:

ASEAN: Brunei Darussalam, Cambodia, Indonesia, Lao People's Democratic Republic, Myanmar, Malaysia,Philippines, Singapore, Thailand, Viet Nam

North Africa: Algeria, Ceuta, Egypt, Libya, Melilla, Morocco, Tunisia, Western Sahara

Other Africa: Angola, Benin, Botswana, British Indian Ocean Territory, Burkina Faso, Burundi, Cabo Verde, Cameroon, Central African Republic, Chad, Comoros, Congo, Democratic Republic of Congo, Côte d'Ivoire (Ivory Coast), Djibuti, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mayotte, Mozambique, Namibia, Niger, Nigeria, Réunion, Rwanda; Saint Helena, Ascension and Tristan da Cuhna; Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, United Republic of Tanzania, Togo, Uganda, Zambia, Zimbabwe

Middle East: Armenia, Azerbaijan, Bahrain, Georgia, Islamic Republic of Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Occupied Palestinian Territory, Oman, Qatar, Saudi Arabia, South Yemen, Syrian Arab Republic, United Arab Emirates, West Bank and Gaza Strip, Yemen

NAFTA: Canada, Mexico, United States

METHODOLOGY

This outlook considers the most recent macroeconomic information and the domestic and international market developments and expectations. Data is subject to retrospective review.

DATA SOURCES

- Eurostat
  - Agricultural production yearly for historical data and monthly data for previous and current year for meat and dairy production
  - Farm livestock survey
  - Gross Indigenous Production (GIP) forecast for meat
  - Early estimates for crop products
  - Harmonised Index of Consumer Prices (HICP)
  - COMEXT database (extra and intra-EU trade statistics)[1]
- ISAMM (Information System for Agricultural Market Management and Monitoring) notifications by Member States
  - Monthly milk collection, milk fat and milk protein
  - Annual olive oil, wine and white sugar production
  - Annual ending stocks of olive oil, wine and white sugar
  - Weekly and monthly EU producer prices
- JRC-MARS:
  - Estimates for yields (cereals, oilseeds, sugar beet)
- European Commission Annual Macro-economic database of the European Commission (AMECO)
- S&P Global
  - DataInsight database
  - Commodity Price Watch
- World Bank, Commodity Markets
- Trade Data Monitor (global trade statistics)

Production forecast for current and next year is based on different data source depending on the sector. Cereals, oilseeds and protein crops production forecast is based on Eurostat monthly data, official estimates of ministries, national statistical institutes, national or European organisations, MS notifications to DG Agriculture and Rural Development and on the Crop Monitoring and Yield Forecasting projections (JRC MARS AGRI4CAST[2]). Meat production is based on expert forecasts of Gross Indigenous Production (in heads) sent by MS to the Commission. Dairy production is based on monthly milk deliveries. The estimated and forecast external trade figures are derived from the latest monthly data available by applying trends and annual production patterns.

Trade forecast is based on the latest COMEXT data available until 15th of the month preceding the publication date. If applicable, weekly TAXUD report are used to accompany this database.

Trade data of EU-UK flows: although the UK is considered a third country partner of the EU since January 2021, EU countries continue reporting trade flows to/from the Northern Ireland in INTRASTAT database while flows to/from Great Britain are reported in the database for extra-EU partners. However, the UK figures are consolidated with a delay to reflect reporting for Northern Ireland (70 days instead of 45). Because of this delay in EU trade data completeness, the period covered by trade data might differ from the period for which monthly production data is available (usually 45 days after the end of month, depending on the source). However, some individual data for other extra-EU partners might already be available as described above. And the weight of flows from/to Northern Ireland or Great Britain on the EU figures could differ depending on the market.

Price transmission along the food chain: main data source for individual indices is Eurostat (Food price monitoring tool). However, EU farmer price indices are not available before January 2015. Before this date, the monthly change is estimated based on MS data weighted by their share in the agricultural output. Latest Eurostat monthly indices for EU farmer prices are available in September 2024. Since this date, the index is estimated based on cereals, sugar, milk, meat, tomatoes and apples monthly prices weighted by annual production (updated by the latest edition of short-term outlook: https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/short-term_en).

[1] *Due to some inconsistencies in intra-EU trade reporting, intra-trade is based on export figures only, i.e. imports of France are calculated as extra-EU imports plus exports of EU partners to France. This except for the UK that remains partially in the intra-EU trade reporting (Northern Ireland), even though it is not part anymore of the EU since February 2020 and therefore included in extra-EU trade figures. For trade with the UK, only the declaration of the Member States (MS) is considered, both imports and exports.*

[2] http://mars.jrc.ec.europa.eu/mars/About-us/AGRI4CAST/Crop-Monitoring-and-Yield-Forecasting

ARABLE CROPS

Figures for the marketing years 2024/25 and 2025/26 are based on a forecast that considers the latest developments, and average trends observed in past. These average trends are removing strong year-on-year variations that could have happened due to extreme market and weather events.

Crop areas

For MS in which data is not yet available, the area is estimated through the Olympic average of the last five marketing years or assuming no changes compared to the previous year.

Yields

MS estimates or AGRI4CAST projections are used if available. If these data are not available, preferably the yield trend over the 12 last years is retained, otherwise the Olympic average of the last five marketing years is used.

Trade

Cereal trade figures include cereals as such, plus flour and groats (in cereal equivalent). In the former editions of the short-term outlook, maize trade included additional processed products. This has been revised backward and the balance is closed via an adjustment of the processing demand.

Balance sheets

They are based on a marketing year starting with the harvest: July/June for cereals and Oct/Sept for sugar. Thus, area, yield and production figures of crops refer to the year of harvest.

CEREALS

Human consumption, seed use and other industrial use is based on historic relations regarding population and planted area in the relevant marketing year. Feed use is based on calculations taking into account the forecast production of animal products. Forecast is based on information about the ethanol production development. Stocks are closing the balance for cereals[3]. Intervention stocks equal official figures of the Directorate-General for Agriculture and Rural Development for the past and estimates based on past experience for the current marketing year, if applicable.

OILSEEDS

The balance sheets include rape, soybean and sunflower seed meal and oil, plus palm oil. Stock data represent own estimates based on expert judgement and market information. Thus, the balances close on the domestic use. A coefficient is used to determine the share of oilseeds used in the crushing industry. These crushing coefficients range from 94% to 98% for rapeseed, 88-91% for soya beans and 85 – 89% for sunflower seed. The balance sheets are interlinked, as oilseeds are crushed into meals and oils based on processing coefficients, used to determine the percentage of meals and oils obtained from oilseeds in the crushing process. These processing coefficients equal 57% for rape meal, 79% for soya bean meal and 55% for sunflower meal and 41% for rape oil, 20% for soya bean oil and 42% for sunflower oil.

SUGAR

For sugar beet area, yield and production, the procedure is similar to the other arable crops. It includes sugar beets for sugar production and for ethanol production. The balance sheet includes only sugar beet production processed into sugar[4] and white sugar. The link with white sugar production is made through the white sugar production as notified under the Common Market Organisation (CMO) for sugar. The presented balances do only consider sugar expressed in white sugar equivalent (e.g. no isoglucose) and take into account sugar beet production outside of the quota (up to 2016/17). Trade of products containing sugar is reported under net exports in processed products under domestic uses of white sugar. These are estimated by applying conversion coefficients to trade volumes of over 400 processed food products.

Industrial and biofuel use is based on historical data and projections based on information about ethanol production development. Stocks are taken from MS notifications when they become available and therefore the balance closes over human consumption. When MS information on stocks is not yet available for the projections, they are closing the balance. The reported stocks include carry-forward sugar (up to 2016/17).

For confidentiality reasons with regard to MS notifications on stocks, EU+UK sugar balances are presented in this report up to 2019/20. For the same reason, only change in EU stocks is presented for 2020/21.

ISOGLUCOSE

Production and stocks data originate from MS notifications under the Common Market Organisation (CMO) when they become available. The balance closes over consumption.

SPECIALISED CROPS

OLIVE OIL

The balance sheet is based on a campaign starting with the harvest: October/September.

Production estimates present MS notifications for an ongoing campaign. Exports and imports are based on seasonal trends and trends observed in previous years in main export destinations. Consumption estimates consider different trends in main producing countries (Spain, Italy, Greece and Portugal) and the rest of the EU. In the former, the link between a variation of annual production and consumption change is considered. The balance closes on ending stocks.

[3] For all crops this refers to a situation as of end-June, which may differ from other balances, e.g. IGC for maize, USDA for corn.

[4] Sugar beet production processed directly into ethanol is not accounted for in the white sugar production.

WINE

The balance sheet is based on a campaign from August to July.

The forecast of vinified production is based on MS notifications for an ongoing campaign. An estimate of the vinified production used for 'other uses' is based on total vinified production as well as the consumer demand for products such as vermouth, cleaning products etc.

Exports and imports are based on trends and market expertise.

Consumption estimates consider different trends in main consuming countries (Spain, Italy, France and Germany) and the rest of the EU. The balance closes on ending stocks.

APPLES

The balance sheet is based on marketing year starting with the harvest: August/July. It includes apples both for fresh consumption and for processing.

The forecast of total apple production is based on forecasts of national or European sectoral organisations. These data, as well as last years' production and consumption, are used to estimate use of apples for processing.

When MS information on stocks is available via World Apple and Pear Association (WAPA), the balance closes on consumption.

Exports and imports are based on seasonal trends and trends observed in previous years in main export destinations. Trade of processed apples is expressed in fresh apple equivalent. The conversion coefficients used to convert processed products into fresh apple weight rates vary between 1.3 and 6[5].

ORANGES

The balance sheet is based on a campaign starting with the harvest: October/September. The balance sheet includes fresh oranges and processed oranges (mainly juice and jams) and is expressed in fresh equivalent.

Area, yield and production data comes from Eurostat. Own estimates are used for oranges produced for processing. Trade of processed oranges is estimated using conversion coefficients into fresh equivalent[6]. Conversion coefficients used to convert processed products into fresh oranges weights vary between 0.3 and 12. No stock data is currently available. The balance closes over apparent consumption. Forecast is based on trends and experts' judgment.

PEACHES AND NECTARINES

The balance sheet is based on a calendar year. It includes peaches and nectarines both for fresh consumption and for processing.

Historical data are based on Eurostat. The total production of peaches and nectarines adds up the production of 'peaches' and the production of 'nectarines'. The production of peaches and nectarines for fresh consumption is calculated as the total production of peaches and nectarines minus peaches for processing.

The production forecast is based on estimated production changes by Europeche and applied to the Eurostat data.

Trade of processed peaches is expressed in fresh peach equivalent. The conversion coefficient is 1 for all processed products, but 6 for dried peaches and nectarines. Projections are based on information about production and trends in consumption as well as trends in main export destinations.

Stocks of fresh peaches are assumed zero. Consumption is calculated as a residual.

TOMATOES

The balance sheet is based on a calendar year It includes tomatoes both for fresh consumption and for processing.

The total production of tomatoes consists of the production of 'tomatoes for fresh consumption' and the production of 'tomatoes for processing'. Eurostat is used for the production of fresh tomatoes and World Tomato Processing Council figures for the production of tomatoes for processing.

The production forecast for fresh tomatoes is based on trends and market expertise. The forecast for tomatoes for processing is based on forecasts from the World Tomato Processing Council.

Trade of processed tomatoes is expressed in fresh tomato equivalent. Conversion coefficients used to convert processed products into fresh tomato weights vary between 1.13 and 19.5[7].

Trade projections are based on production, consumption estimates and trends observed in previous years in main export destinations.

Stocks of both fresh and processed tomatoes are assumed to be zero. Consumption is calculated as a residual. This implies that stock changes are included in consumption figures.

MILK AND DAIRY PRODUCTS

The commodity balance sheets cover production of dairy products taking place in dairy processing plants and so far, do not include on-farm production.

Total EU production of dairy products and in particular for SMP and WMP is estimated, where necessary since the concentration in the dairy processing industry has resulted in an increasing number of MS not publishing their (monthly) production statistics due to confidentiality.

Dairy products production for year 2023 is based on Eurostat annual statistics, with estimates for 2023 based on the available monthly statistics, taking into account the country

[5] Conversion coefficients are based on a work conducted by Eurostat in 2009.

[6] Conversion coefficients are laid down in Working Document 'Handbook for compiling supply balance sheets – vegetables (ESTAT/ASA/PE/640rev3_WPM).

[7] Conversion coefficients are based on updates provided by TomatoEurope in March 2024.

coverage and sample characteristics (therefore not fully comparable to reported monthly figures by Eurostat, and based on the comparison of trends between annual and monthly databases in past). Forecast for 2024 and 2025 are based on current market developments, price expectations, the trends stemming from the medium-term projections and on consumption patterns. Assumptions are made on the dairy herd and cow milk yield, milk demand for direct sales, feed and on-farm use, and milk fat and protein content developments.

Milk uses for dairy products are balanced with availability of total milk fat and proteins through a 'residual approach'.

2024 and 2025 market estimates and forecast are first made for milk deliveries and the production of dairy products. The forecast production figures are then converted into protein and fat equivalents and subtracted from the available dairy fat and protein of the milk delivered. In the dairy products balances, consumption is calculated as a residual, i.e. sum of production plus imports less exports plus stock change. Knowledge of private (commercial) stocks and consumption levels is incomplete or lacking for most dairy products. The developments in domestic use may hide considerable changes in private (industry/trade) stocks.

The analysis of the milk collection in the EU countries faces a challenge in this edition of the agricultural outlook due to the inconsistency of the available statistical data among different sources. There is a difference in the reported milk deliveries to Eurostat and to DG Agriculture and Rural Development through ISAMM notifications for the year 2024 for some EU countries. As a result, and after Eurostat stopped collecting monthly cow's milk deliveries from 2025 onwards, the reported statistical data by some MS for 2025 milk deliveries is not fully comparable with historical Eurostat data. Therefore, in this report, the milk supply projections in the EU countries between 2024 and 2025 rely on ISAMM notifications, as a basis for the overall EU milk supply outlook. At the same time, milk deliveries in the EU countries in 2024 are based on monthly milk deliveries reported by Eurostat.

Trade is expressed in milk equivalent using the total solid methodology accounting for the non-fat and protein components of milk, such as lactose. As a consequence, the milk coefficient of cheese (composed of fat and protein only) is lower with this methodology (3.58) than when accounting for fat and protein only (5.97). The other coefficients used are: 6.57 for butter, 7.57 for SMP, 7.56 for WMP, 7.48 for whey powder, 0.85 for drinking milk, 3.21 for cream and 0.98 for yogurts.

In the case of butter, trade flows under inward and outward processing are extracted from trade figures in the butter balance sheet. As those regimes are not reported for flows to/from UK, for imports under inward processing a coefficient of 30% is applied for EU imports from the UK and a coefficient of 20% for EU exports to the UK to account for outward processing. Those values are then extracted from the EU trade flows. This methodology might change when the respective regimes will start to be reported.

MEAT

The meat balance sheets cover the beef, pig, poultry, sheep and goat meat categories. Trade data is divided into live animals and meat products ('fresh and chilled', 'frozen', 'salted' and 'prepared'). The offal and fat categories are excluded (except for pork lard). All data is expressed in carcass weight equivalent unless specified otherwise[8].

Production forecasts for 2025 are based on annual and monthly data on slaughtering, current market developments, MS expert forecast, and the trends in livestock numbers and meat consumption patterns. Net production refers to data on slaughtering taking place in the registered slaughterhouses as well as in other establishments. The other slaughtering is subject to constant reviews; therefore, data on the net production might be sensitive to these changes. GIP is calculated as net production plus live exports minus live imports. Consumption is calculated as a residual, i.e. sum of production plus imports less exports plus stock change.

DATA

All EU balance sheets are available in Agri-Food data portal only, in the form of both tables and graphs.

[8] Carcasses of bovine animals, pigs, sheep, goats and poultry are defined at point 3 ('carcass weight' at point 4) of Annex I of Regulation (EC) No 1165/2008 concerning livestock and meat statistics. For more details as regards the conversion coefficients of product weight into carcass weight equivalent please refer to the Eurostat document ASA/TE/F/655.

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Publications Office
of the European Union

ISSN 2600-0873