



Brussels, 5 June 2025
(OR. en)

9934/25

Interinstitutional File:
2024/0028 (COD)

POLCOM 121
COEST 443
AGRI 252

COVER NOTE

From: Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director

date of receipt: 4 June 2025

To: Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union

No. Cion doc.: SWD(2025) 157 final

Subject: COMMISSION STAFF WORKING DOCUMENT Bi-monthly report to the Member States Impact of the trade liberalisation measures for Ukraine on the EU market - May 2025

Delegations will find attached document SWD(2025) 157 final.

Encl.: SWD(2025) 157 final



Brussels, 4.6.2025
SWD(2025) 157 final

COMMISSION STAFF WORKING DOCUMENT

Bi-monthly report to the Member States

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

Introduction

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

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

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

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

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

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

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

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

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

The Report

Part A

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

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

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

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

The services of the Commission will continue to monitor imports from Ukraine very closely and all the information received will be carefully analysed as part of the regular monitoring pursuant to Article 4(2) of the ATM Regulation.

Part B

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

Automatic safeguard implementation

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

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

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

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

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

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

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

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

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

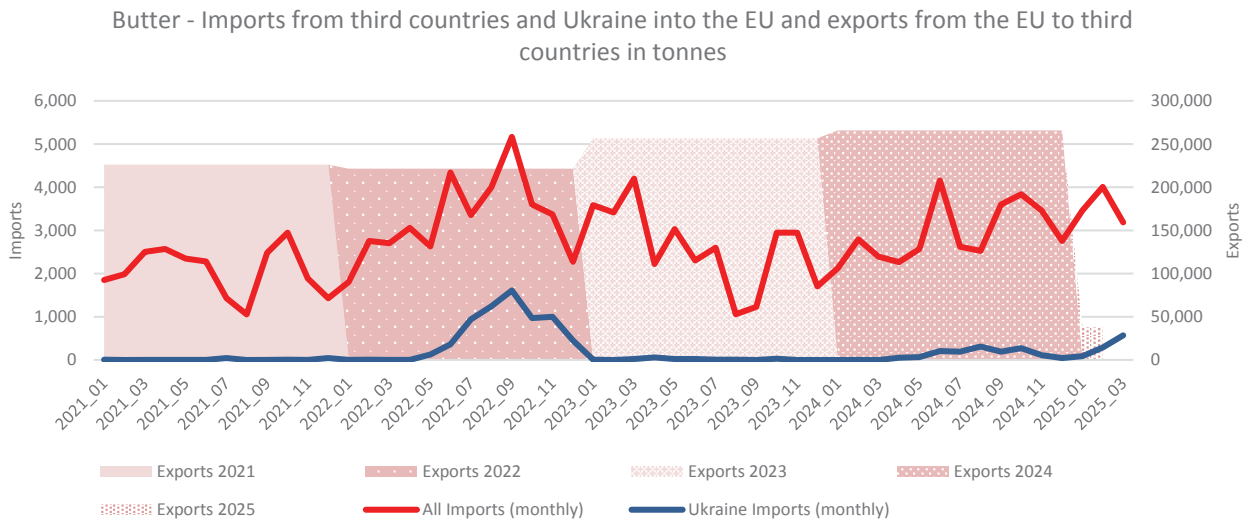
Description / year_month	2024_02	2024_03	2024_04	2024_05	2024_06	2024_07	2024_08	2024_09	2024_10	2024_11	2024_12	2025_01	2025_02	2025_03	Order no.
Beef Meat	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.4270
Pork Meat (TRQ.1)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.4271
Pork Meat (TRQ.2)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.4272
Poultry meat (TRQ.1)	14,447	12,534	15,250	12,567	10,848	10,148	9,870	9,661	9,676	10,044	6,990	9,857	13,196	13,122	09.4273
Poultry meat (TRQ.2)	883	1,167	1,410	954	482	219	262	246	140	107	89	187	197	164	09.4274
Eggs and albumins (TRQ.1 + TRQ.2)	3,532	4,821	4,444	6,042	4,694	5,783	3,707	4,946	6,324	6,061	6,132	7,588	7,511	8,171	09.4275
Common wheat, flour and pellets	575,363	612,044	538,126	626,146	322,970	361,431	338,377	773,443	722,027	361,927	364,877	466,615	324,756	395,186	09.4306
Barley, flour and pellets	13,901	24,460	18,429	35,774	80,693	133,372	22,103	18,220	113,528	60,158	27,180	13,870	15,955	8,859	09.4307
Maize, flour and pellets	1,432,887	1,045,531	1,201,572	1,264,997	1,463,882	1,663,284	668,831	341,675	870,944	1,072,558	1,030,648	1,349,081	1,189,213	1,085,564	09.4308
Milk, cream, condensed milk and yogurts	101	152	269	331	131	226	165	341	386	557	355	311	461	517	09.4600
Milk powder	783	1,098	1,430	1,919	2,730	1,966	1,320	1,000	1,081	879	789	1,210	1,215	1,776	09.4601
Butter and dairy spreads	0	0	51	63	209	187	312	187	274	108	43	88	288	571	09.4602
Sheep meat	0	0	0	0	0	0	0	0	0	0	442	0	0	0	09.6700
Honey	6,093	5,448	5,643	9,407	6,840	6,160	2,429	1,200	1,533	1,507	502	19,079	1,501	1,645	09.6701
Garlic	0	0	0	0	0	3	106	75	82	18	0	0	0	0	09.6702
Oats	1,510	618	1,010	1,791	749	231	69	92	114	442	268	495	1,167	1,475	09.6703
Sugar	50,608	47,854	77,841	87,502	12,219	277	429	222	4,494	279	145	1,509	3,179	20,648	09.6704
Glucose and fructose	247	214	400	389	414	257	225	91	177	172	119	202	272	287	09.6705
Flavoured sugar syrup	3	5	3	3	1	1	0	2	3	1	1	0	1	2	09.6706
Groats, pellets, grains	2,918	3,176	3,102	3,904	3,345	2,382	473	786	905	813	811	4,709	1,886	984	09.6707
Malt and gluten	311	464	513	328	416	2,058	3,323	2,155	1,790	1,385	1,364	922	769	659	09.6708
Starches	1,109	833	2,055	2,458	1,167	1,731	688	1,137	2,290	1,530	918	1,403	1,306	847	09.6709
Starch processed (PAPS)	818	375	161	66	44	22	16	1	1,167	1,011	660	341	1,245	1,303	09.6710
Residues	2,729	2,659	2,969	5,898	5,308	5,887	6,060	4,936	5,018	3,980	4,459	3,015	4,048	6,444	09.6711
Mushrooms	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.6712
Mushrooms	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.6713
Preserved tomatoes	2,255	1,428	1,430	1,290	2,290	2,114	1,523	1,183	1,643	2,281	1,832	1,397	1,404	1,055	09.6714
Grape and apple juice	5,858	4,929	6,479	4,310	1,701	1,834	4,738	14,162	15,660	7,381	4,213	2,462	2,527	1,897	09.6715
Fermented milk (PAPS)	0	0	1	0	0	0	0	0	2	0	0	0	0	4	09.6716
Processed butter (PAPS)	0	0	2	0	2	0	3	0	2	0	2	0	0	5	09.6717
Sweetcorn (PAPS)	97	11	69	75	46	82	125	226	197	55	269	153	66	73	09.6718
Sugar processed products (PAPS)	69	88	191	174	303	555	360	519	390	415	532	505	627	743	09.6719
Cereal processed products (PAPS)	45	24	111	49	177	66	0	68	112	91	45	67	89	2	09.6720
Milk Cream Processed (PAPS)	21	11	22	13	17	0	8	8	6	14	19	15	21	1	09.6721
Food preparations (PAPS)	15	13	9	23	11	46	9	47	24	32	30	9	34	14	09.6722
Ethyl alcohol	2,049	4,288	10,060	7,517	7,542	4,776	4,203	9,960	9,978	4,744	13,617	9,845	6,942	8,571	09.6723
Cigars, cigarettes (PAPS)	0	0	0	3	0	0	0	0	0	0	0	0	0	0	09.6724
Mannitol, sorbitol (PAPS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.6725
Malt-starch processed products (PAPS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	09.6726

Source: EUROSTAT (2024_02 to 2025_02) and DG TAXUD, Surveillance 3 (2025_03), extracted on 19.04.2025

PART A

BUTTER

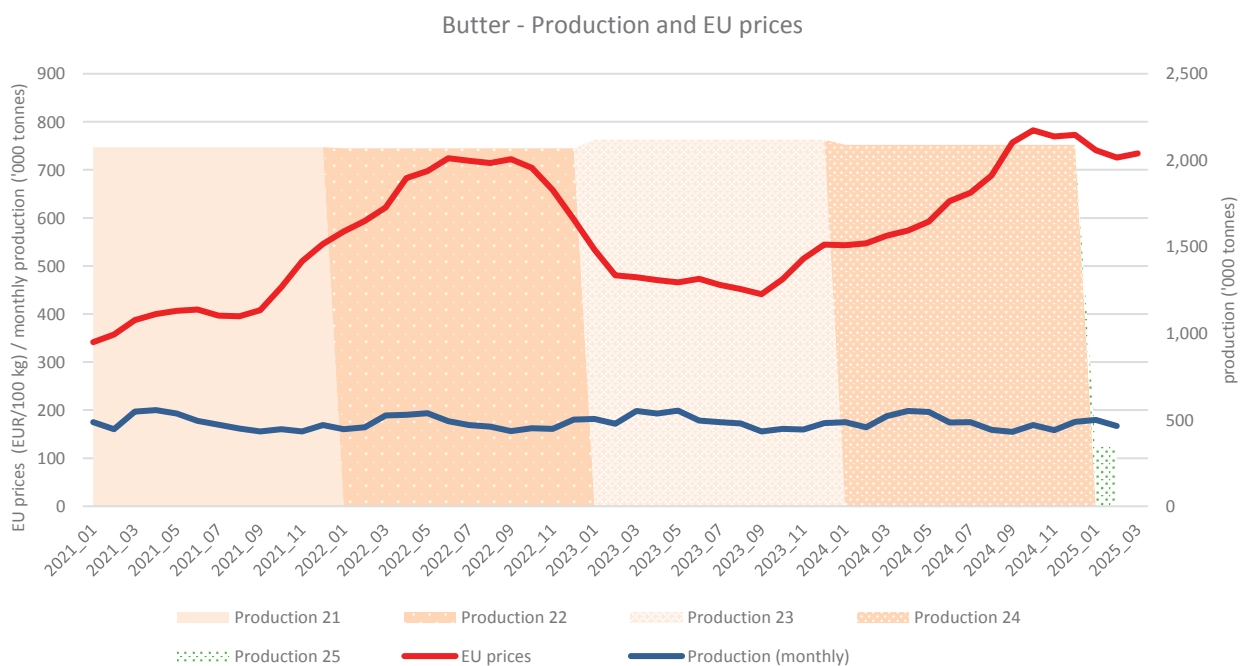
EU imports of butter from Ukraine between January 2025 and March 2025 amount to 946 tonnes, representing 8.9% of total EU butter imports. **EU exports** of butter between January 2025 and February 2025 decreased by 11% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

EU butter price in March 2025 was 30% higher than in March 2024.

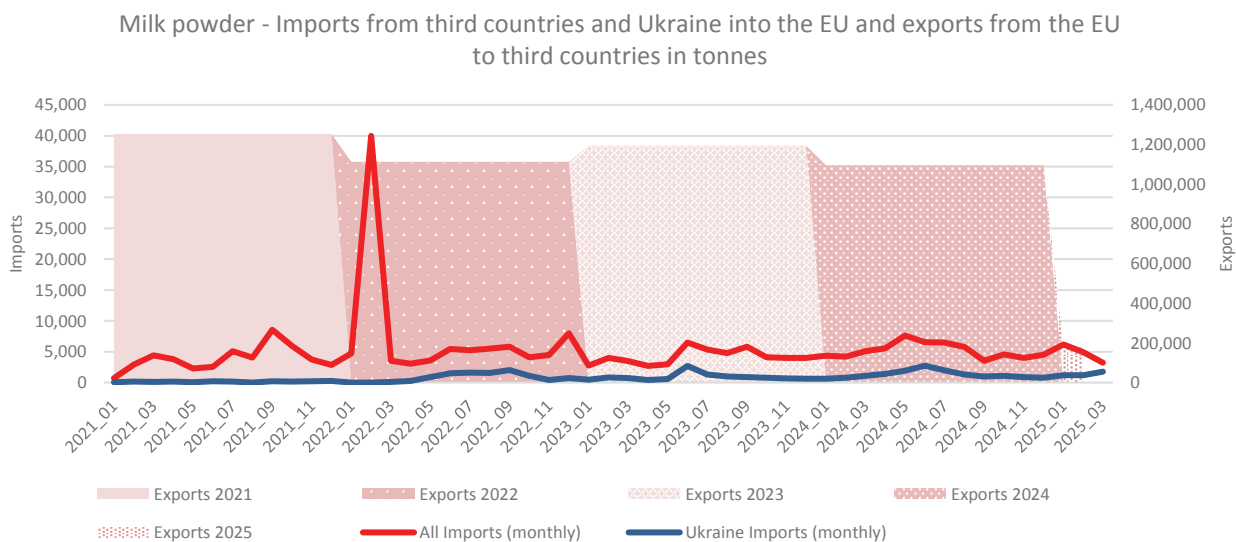
EU butter production between January and February 2025 increased by 1.1% compared to 2024. **Imports of butter from Ukraine** represented 0.11% of **EU butter production** from January 2025 to February 2025.



Source: European Commission

MILK POWDER

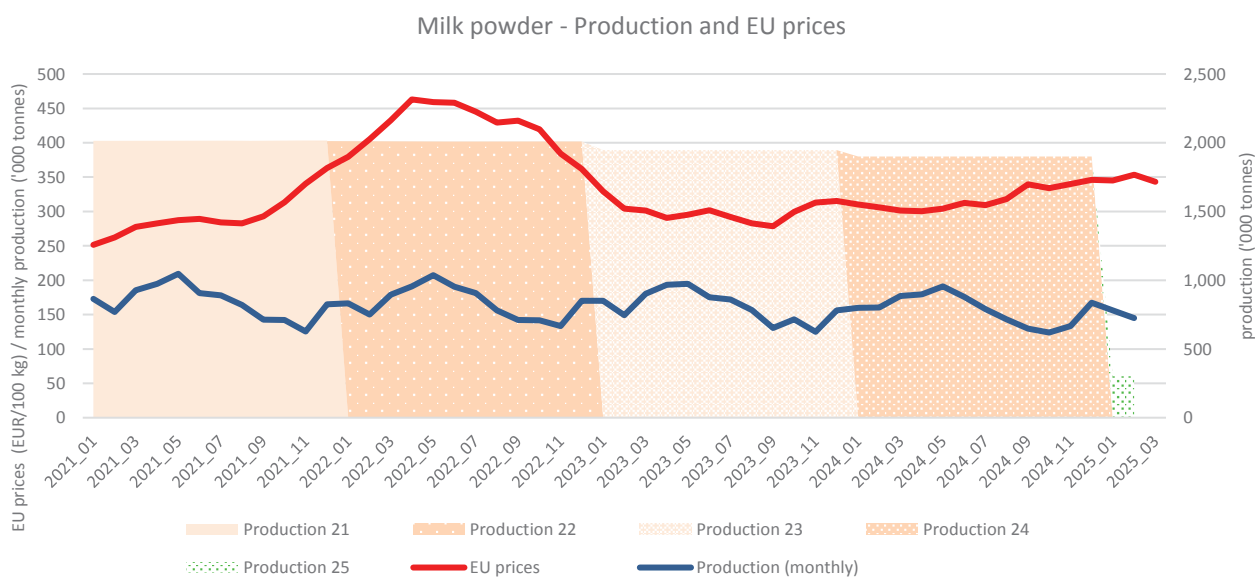
EU imports of milk powder from Ukraine between January 2025 and March 2025 were 68.8% higher than in the same period of 2024 and these represented 29.3% of total EU imports. **EU exports** of milk powder between January 2025 and March 2025 decreased by 2% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

EU milk powder price in March 2025 was 14% higher than in March 2024.

EU milk powder production between January 2025 and March 2025 was 6% lower than in the same period of 2024. **Imports of milk powder from Ukraine** represented 1.4% of **EU milk powder production** from January 2025 to February 2025.



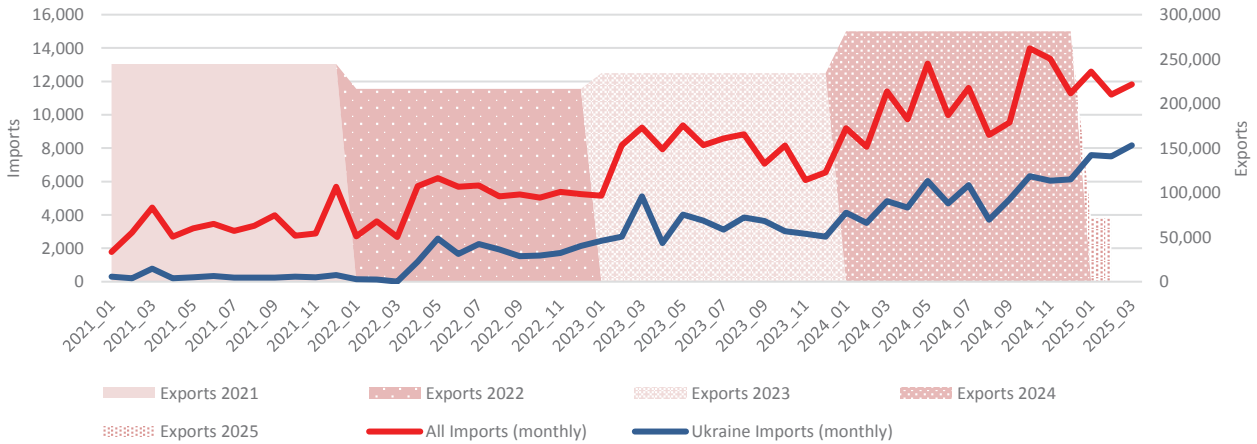
Source: European Commission, based on Whole Milk Powder and Skimmed Milk Powder data

EGGS

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

EU imports of eggs from Ukraine between January 2025 and March 2025 were 86.4% higher than in the same period of 2024 and these represented 65.3% of total EU imports. **EU exports** between January 2025 and February 2025 increased by 83% as compared to the same period of 2024.

Eggs - Imports from third countries and Ukraine into the EU and exports from the EU to third countries in tonnes

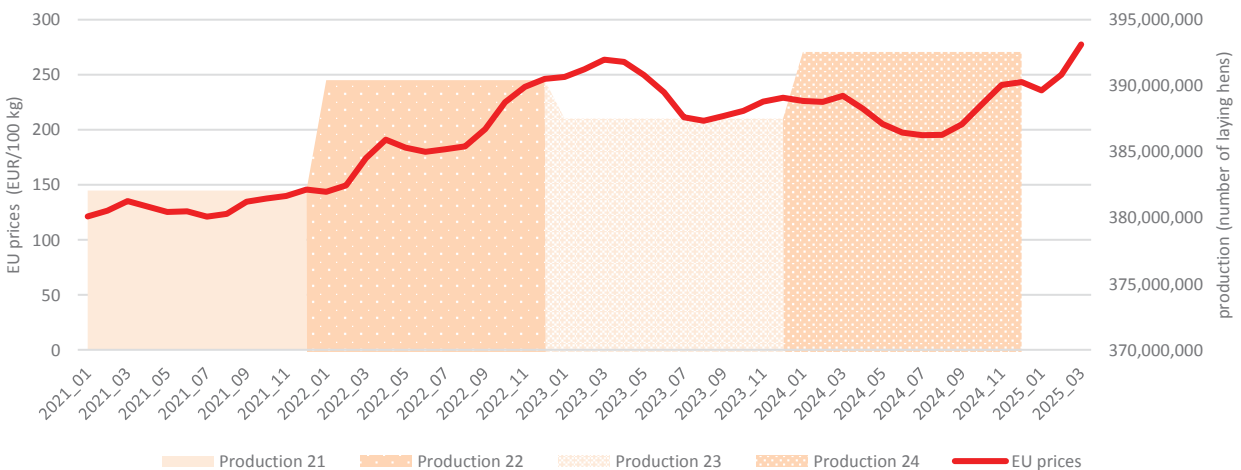


Source: Eurostat & Surveillance 3

EU eggs price in March 2025 was 20% higher than in March 2024.

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

Eggs - Production and EU prices

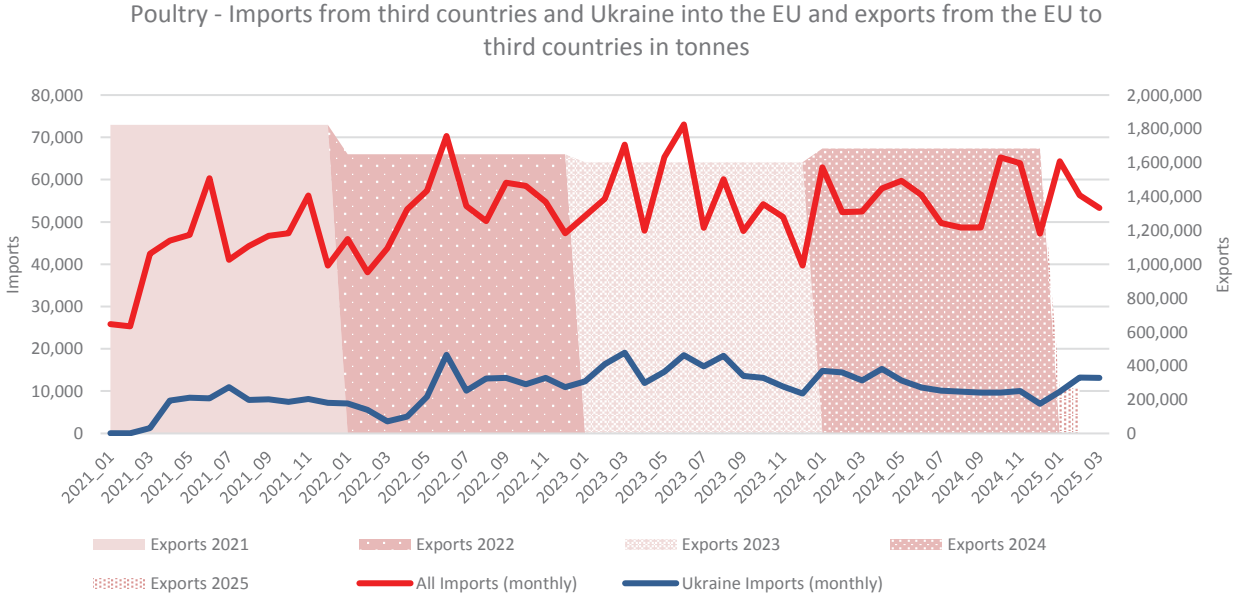


Source: European Commission

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

POULTRY

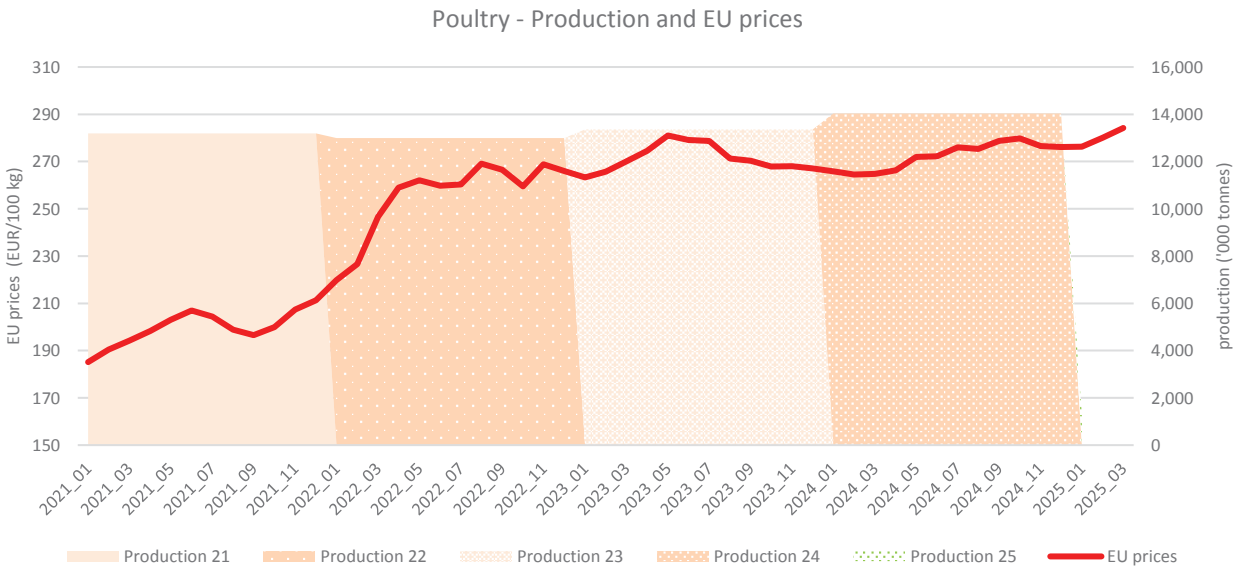
EU imports of poultry from Ukraine between January 2025 and March 2025 were 13.4% lower than in the same period of 2024 and these represented 20.8% of total EU imports. **EU exports** of poultry between January 2025 and February 2025 decreased by 4% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

EU poultry prices in March 2025 were 4% higher than in March 2024.

EU poultry production between January 2025 and February 2025 was 5% higher than in the same period of 2024. It is underlined that EU production data covers the whole broiler carcass (while imports from Ukraine are mainly boneless cuts- breast fillets). This hampers a direct comparability.

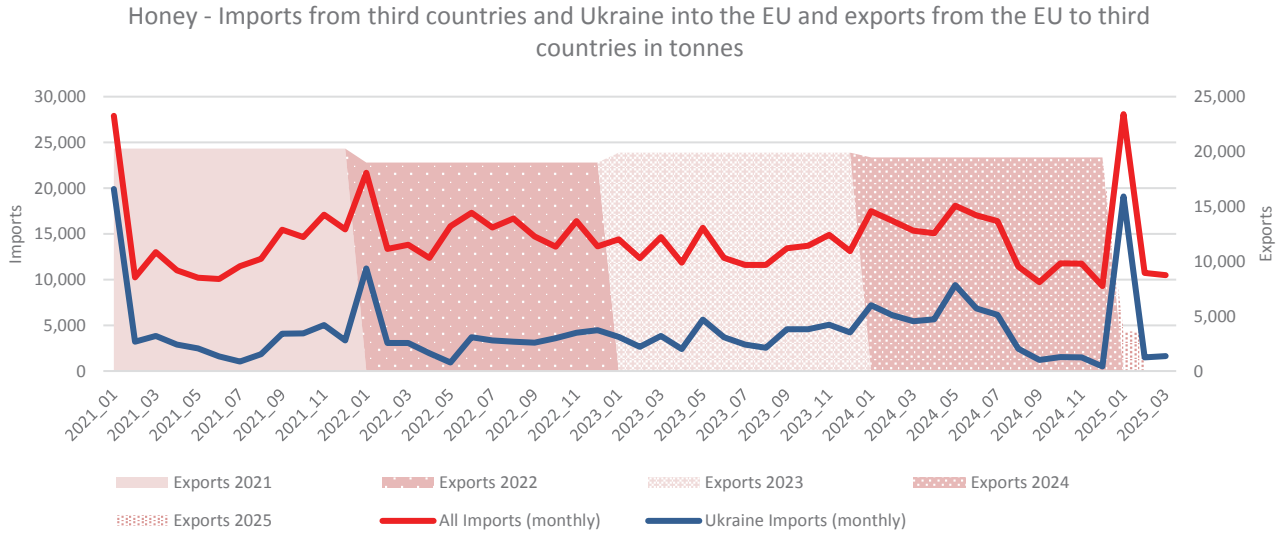


Source: European Commission

HONEY

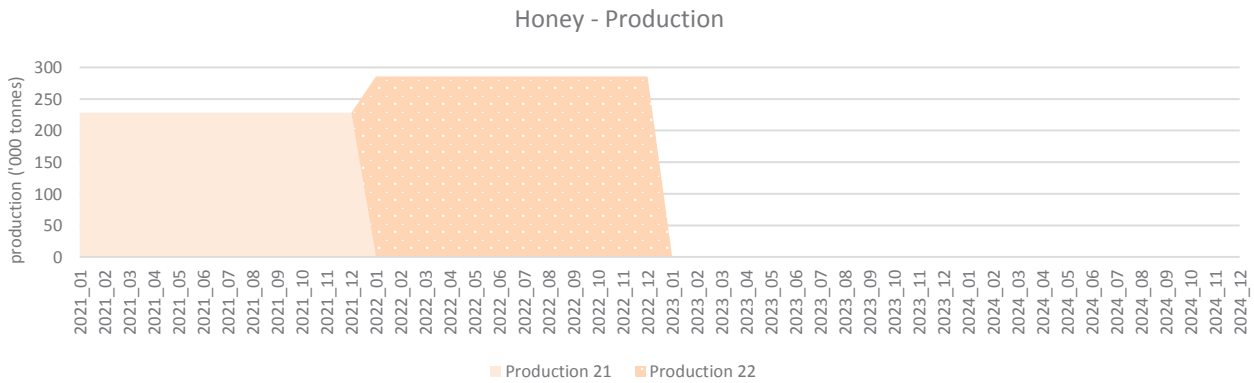
The trigger level for honey was reached in August 2024, and the DCFTA TRQ was re-introduced on 21 August 2024. ⁽¹¹⁾

EU imports of honey from Ukraine between January and March 2025 were 18.6% higher than in the same period of 2024 and represented 45.1% of total EU imports. **EU exports** between January 2025 and February 2025 increased by 11% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

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



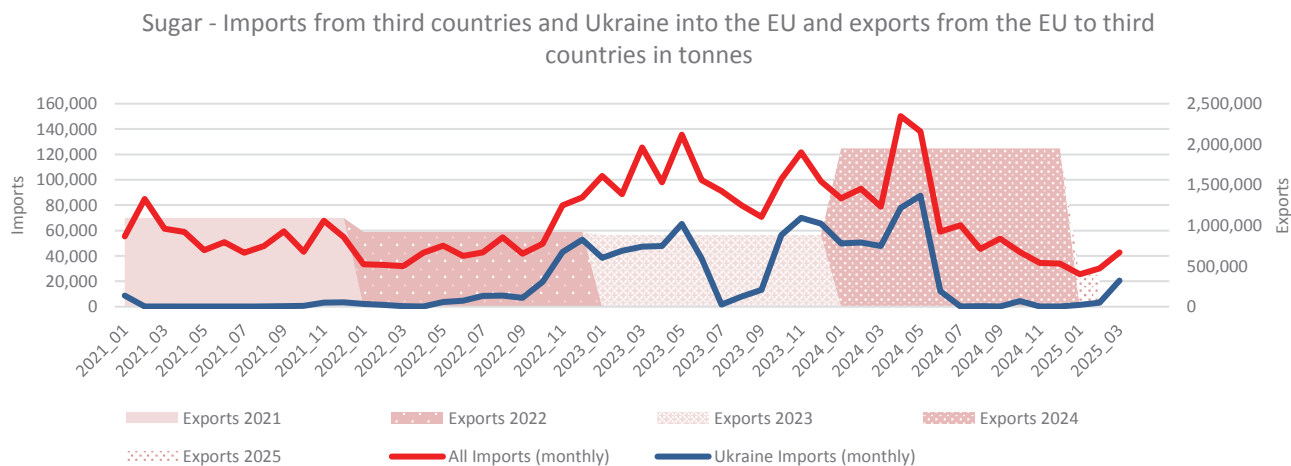
Source: European Commission

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

SUGAR

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

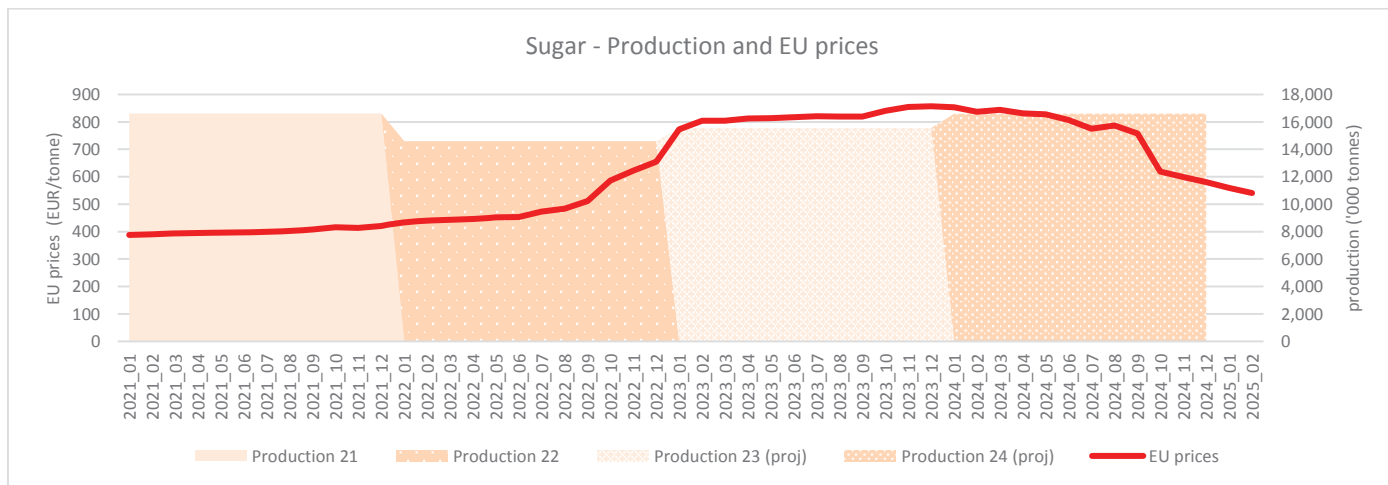
EU imports of sugar from Ukraine between January 2025 and March 2025 were 82.9% lower than in the same period of 2024 and these represented 25.7% of total EU imports. **EU exports** between January 2025 and February 2025 increased by 45% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

EU sugar price in March 2025 was 35% lower than in February 2024.

EU sugar production projection for the current marketing year 2024/25 (that starts on 1 October) is 6.7% higher than in 2023/24 ⁽¹³⁾. Sugar imports from Ukraine between October 2024 and March 2025 represent about 0.18% of the projected total EU production of the marketing year 2024/25.



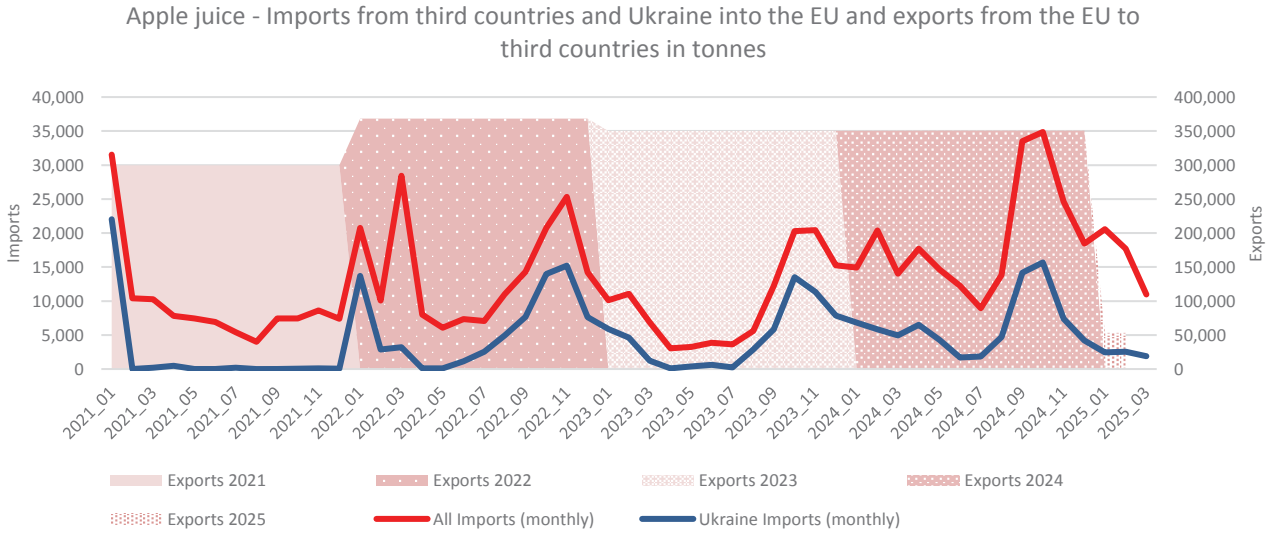
Source: European Commission

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

⁽¹³⁾ https://agriculture.ec.europa.eu/data-and-analysis/markets/overviews/market-observatories/sugar_en

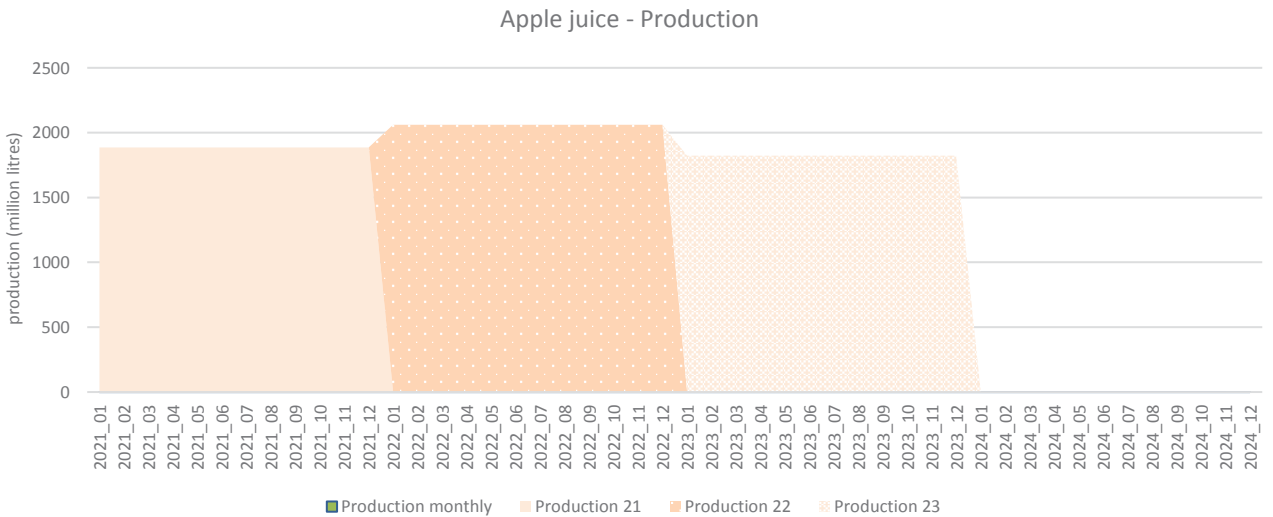
APPLE JUICE

EU imports of apple juice from Ukraine between January 2025 and March 2025 were 60.9% lower than in the same period of 2024 and these represented 14% of total EU imports. **EU exports** between January 2025 and March 2025 decreased by 7.8% as compared to the same period of 2024.



Source: Eurostat & Surveillance 3

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



Source: European Commission

PART B

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

This document is provided on a regular basis to the Member States in relation to the statement¹⁴ by the Commission on the monitoring of imports of grain from Ukraine provided on the occasion of the adoption of Regulation (EU) 2024/1392 of the European Parliament and of the Council of 14 May 2024 on temporary trade-liberalisation measures supplementing trade concessions applicable to Ukrainian products under the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part¹⁵:

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

General trends in a nutshell

According to the International Grains Council (IGC), **world wheat production** is projected to reach a new peak of 806.4 million tonnes (-0.3 million m/m; +1.1% y/y) in 2025/26, assuming moderately higher yields and with harvested area broadly steady y/y. Considering trend yields and assuming that planting intentions are fulfilled, **world maize** production is estimated by the IGC at a record 1 273.9 million tonnes (+4.8 million m/m; +4.6% y/y) in 2025/26.

Since January, cereals shipments have started to slow considerably from the Black Sea reflecting tightening availabilities and the introduced export constraints by Russia and Ukraine. By end of April, Ukraine exported 13.8 million tonnes of wheat (-12% y/y), representing 85.5% of the export quota (16.2 million tonnes). Reduced competition from the Black Sea, at least until the next harvest, could facilitate EU wheat and barley exports.

On the global cereals markets attention is gradually turning to new crop conditions and forecasts. Against improved prospects for the next harvests benchmark cereals prices softened slightly. The IGC wheat sub-index, which indicates global price trends, fell by 8% year-on-year, while the IGC maize sub-index increased by 8% during past year.

Russian **milling wheat prices** eased marginally to USD 251 per tonne. Aided by a weakening US dollar, US wheat prices became more competitive, incl. the Soft Red Winter wheat falling by USD 11 m/m to USD 229 per tonne and the Hard Red Winter wheat down USD 12 m/m to USD 250 per tonne.

Maize prices (fob export) increased slightly further for Ukraine (+USD 3 to USD 242 per tonne) due to tight availabilities. For the other three major exports (ARG, BRA and US) prices are very close to each other in the range of USD 223-225 per tonne.

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

¹⁵ https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L_202401392

Linked to seasonally low availabilities, Ukrainian fob maize prices are now significantly higher than other key origins (close to USD 250 per tonne vs. about USD 210 per tonne).

EU cereals production in marketing year 2024/25 is projected at 254.8 million tonnes (-4.9% y/y and 9.1% below the five-year trimmed average). The production has been affected by adverse climate events or conditions, notably drought in south-eastern Europe and excessive wet conditions in northern and western Europe.

Total EU cereals production for 2025/26 is projected at 280.3 million tonnes (+10% year-on-year). Soft wheat production is projected at 126.3 million tonnes, maize at 65.0 million tonnes and barley at 51.7 million tonnes. This forecast is updated monthly in line with evolving meteorological conditions and update information on area sown. Currently, drought conditions are affecting large parts of eastern and southern Europe, the Mediterranean region, and the Baltic countries and if these conditions persist could start affecting crops yields.

As for **EU cereals' trade**, preliminary data from Taxud Surveillance database shows that imports for marketing year 2024/25 by 20 April 2025 stand at 26.3 million tonnes, including 6.6 million tonnes of soft wheat and 16.8 million tonnes of maize. This represents a reduction of 3% y/y. Of these, cereal imports from Ukraine reached 12.4 million tonnes, of which 8.2 million tonnes of maize and 3.7 million tonnes of soft wheat. Most of the imports from Ukraine were destined to Spain, whereas almost no volumes reached neighbouring Member States from April 2023 onwards. EU cereals exports in the marketing year 2024/25 in turn reached 26.7 million tonnes (-31% compared to the same period of marketing year 2023/24), including 17.2 million tonnes of soft wheat (-34% y/y) and 6.6 million tonnes of barley (-20% y/y). However, cereals exports figures could be significantly underestimated give the persistent problems with availability of customs data from certain Member States, in particular France, a major cereal exporter.

Total **EU oilseed production** for the marketing year 2025/26 is projected to expand by 12.2% year-on-year to 31.5 million tonnes, reflecting a rebound in yields for all oilseeds in the 2025/26 season. **Rapeseed** production is estimated at 18.9 million tonnes. Sunflower seed output projections remain at 9.7 million tonnes, anticipating a significant recovery in key producing Member States.

Preliminary data from Taxud Surveillance database shows that for EU oilseeds and oilseeds' co-products imports for marketing year 2024/25 by 20 April 2025 stand at 38.7 million tonnes (+6% y/y), out of which 11.2 million of soya beans (+9% y/y), and 15.1 million tonnes of soya meal (+26% y/y). The increase in imports of soya beans, rapeseed, and soya bean meal is largely compensating for the decline in rapeseed meal (-62% y/y) and rapeseed oil imports (-53% y/y) from Russia and Belarus. On 20 April, EU oilseed imports from Ukraine, for the current marketing year, reached a total of 7.6 million tonnes, mainly rapeseeds (2.3 million tonnes), sunflower oil (1.7 million tonnes), soya beans (1.3 million tonnes), rapeseed and sunflower seed meals. Oilseeds imports to the Member States neighbouring Ukraine were negligible since April 2023, except for Poland which remained the top EU importer of Ukrainian sunflower and soybean meals and vegetable oils. EU exports of oilseeds reached 3.6 million tonnes (-6% y/y).

EU oilseed prices followed global trends. EU rapeseed quotations are up by 17% year-on-year and sunflower seed by 50% year-on-year. Prices increased on reduced level of the harvest in key producing countries and strong export demand from the food, feed and biofuel markets.

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

CONTENTS

1.	EU cereals production evolution.....	14
2.	EU oilseeds production evolution.....	15
3.	EU cereal trade (data from TAXUD surveillance) (1/7/2024-4/5/2025) (all origins).....	15
4.	EU oilseeds trade (data from TAXUD surveillance) (1/7/2024-4/5/2025) (all origins).....	17
5.	Official Ukrainian exports figures and share of the EU among destinations	19
6.	Main importing Member States (data based on Eurostat/Comext)....	21
7.	Imports into Member States neighbouring Ukraine (from 1/1/2022 to 4/5/2025).....	24
8.	Ukrainian export destinations (data is based on the Ukrainian State Customs Service)	25
9.	Price developments for main cereals and oilseeds (in the EU and globally).....	26

1. EU cereals production evolution

- Total EU production

EU-27: usable production by selected crops (thousand tonnes)								5-Year TrimAvg	2025p vs 5Y TrimAvg
Crop	2019	2020	2021	2022e	2023e	2024f	2025p		
Soft wheat	131 126	118 099	129 009	125 814	125 185	111 671	126 333	123 033	🟡 2.7%
Durum wheat	7 397	7 345	8 079	7 464	7 413	7 213	7 933	7 407	🟢 7.1%
Maize	70 120	67 433	73 193	53 116	61 225	59 140	65 008	62 599	🟡 3.8%
Barley	55 042	53 937	51 443	51 418	47 047	49 143	51 729	50 668	🟡 2.1%
Triticale	10 979	12 100	11 442	11 139	10 750	9 924	11 011	11 110	🟡 -0.9%
Oat	6 869	8 401	7 399	7 360	5 831	7 676	7 485	7 478	🟡 0.1%
Rye	8 269	8 740	7 773	7 285	7 385	6 928	7 311	7 481	🟡 -2.3%
Sorghum	965	978	774	504	787	989	779	846	🔴 -7.9%
Other cereals	3 865	3 481	3 655	2 610	2 218	2 101	2 721	2 770	🟡 -1.8%
Total cereals	294 632	280 514	292 767	266 708	267 841	254 785	280 310	271 688	🟡 3.2%

Source: European Commission, DG AGRI, *update 24 April 2025*

- Production of Member States neighbouring Ukraine

Update: 24/4/2025	Soft wheat			Maize			Barley			Total cereals		
	2025/26	y/y (%)	y/5-y av (%)	2025/26	y/y (%)	y/5-y av (%)	2025/26	y/y (%)	y/5-y av (%)	2025/26	y/y (%)	y/5-y av (%)
Bulgaria	6.6	-1.9	1.9	2.9	81.4	10.6	0.9	-15.4	29.8	10.5	10.0	9.7
Hungary	5.7	14.2	14.2	6.4	21.5	6.6	1.8	17.2	13.6	14.7	15.7	6.1
Poland	12.9	4.9	1.9	8.3	-11.2	-0.3	3.4	12.8	14.3	35.5	2.5	1.3
Romania	9.2	-8.0	-1.7	10.1	68.7	13.0	2.4	-11.2	25.5	22.2	15.5	13.7
Slovakia	2.0	52.7	9.2	1.3	31.5	3.7	0.6	8.5	-2.1	4.3	31.9	9.1
Total 5 MS	36.4	3.0	3.1	28.9	25.0	6.8	9.0	2.7	17.0	87.3	9.9	6.4
Total EU	126.3	13.1	2.7	65.0	9.9	3.8	51.7	5.3	2.1	280.3	10.0	3.2

Source: European Commission, DG AGRI

2. EU oilseeds production evolution

EU-27: production by selected crops (thousand tonnes)								5-Year TrimAvg	2025p vs 5Y TrimAvg
Crop	2019	2020	2021	2022	2023e	2024f	2025p		
Rapeseed	15 380	16 687	17 072	19 561	19 737	16 763	18 902	17 799	↑ 6.2%
Sunflower seed	10 244	9 001	10 365	9 302	9 799	8 290	9 669	9 367	↔ 3.2%
Soybean	2 742	2 617	2 649	2 448	2 792	2 991	2 888	2 686	↑ 7.5%
Linseed	73	85	106	84	82	65	70	84	↓ -15.8%
Field peas	2 012	1 920	1 837	1 866	1 907	2 068	1 841	1 898	↔ -3.0%
Broad/field beans	1 033	1 254	1 126	1 292	1 163	1 403	1 278	1 236	↔ 3.4%
Lupins	215	342	321	452	365	318	341	343	↔ -0.7%
Total oilseeds	28 439	28 390	30 192	31 395	32 410	28 110	31 529	29 992	↑ 5.1%
Total protein crops	3 260	3 516	3 285	3 610	3 435	3 790	3 460	3 520	↔ -1.7%

Source: European Commission, DG AGRI, update 24 April 2025

- Production of Member States neighbouring Ukraine

Update: 24/4/2025	Rapeseed			Sunflower seed			Soybean			Total oilseeds		
	2025/26	y/y (%)	y/5-y av (%)	2025/26	y/y (%)	y/5-y av (%)	2025/26	y/y (%)	y/5-y av (%)	2025/26	y/y (%)	y/5-y av (%)
Bulgaria	0.3	59.7	-2.6	1.9	16.3	2.6	0.0	615.9	-11.1	2.1	20.3	0.7
Hungary	0.4	-14.2	-38.3	1.8	-1.4	1.4	0.2	-33.1	1.1	2.3	-6.9	-11.5
Poland	3.4	1.3	-0.4	0.0	-3.4	-2.7	0.0	-50.5	1.9	3.5	0.1	-0.7
Romania	2.0	68.1	55.7	2.2	49.5	7.1	0.3	2.7	-1.3	4.5	52.1	23.3
Slovakia	0.4	1.5	-8.4	0.2	9.9	4.7	0.1	-11.1	5.1	0.7	0.5	-1.9
Total 5 MS	6.4	15.9	6.8	6.1	19.3	3.8	0.7	-16.2	0.8	13.1	15.2	4.1
Total EU	18.9	12.8	6.2	9.7	16.6	3.2	2.9	-3.5	7.5	31.5	12.2	5.1

Source: European Commission, DG AGRI

3. EU cereal trade (data from TAXUD surveillance)¹⁶ (1/7/2024-4/5/2025) (all origins)

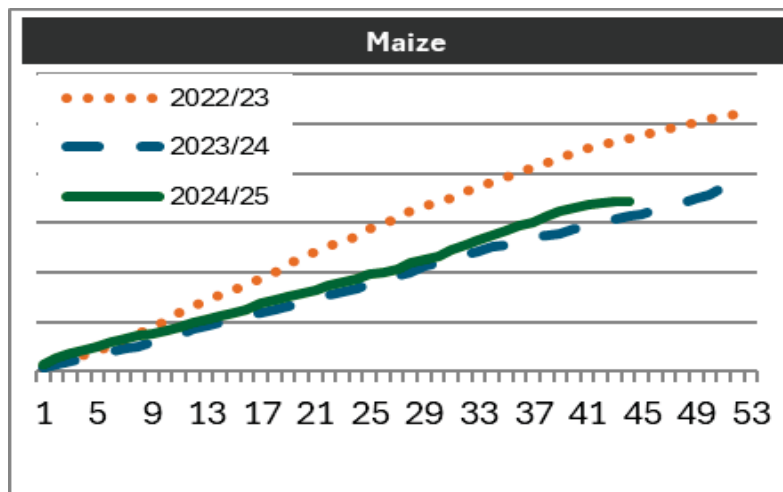
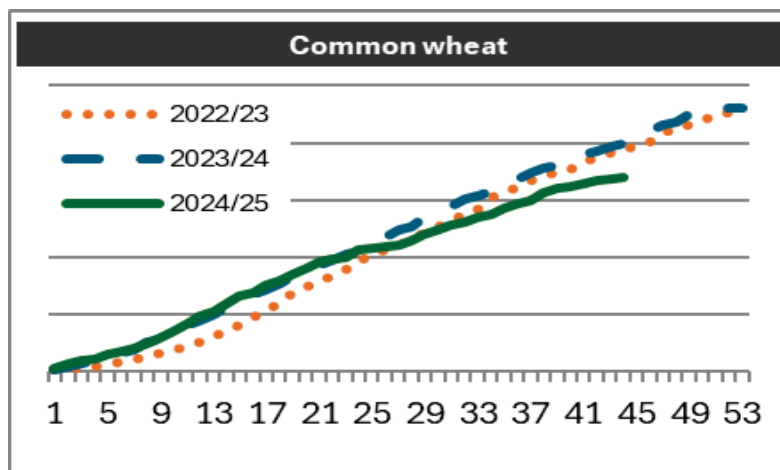
Customs Surveillance (tonnes)	EU 01/07/2024 - 04/05/2025				EU 01/07/2023 - 05/05/2024		EU 01/07/2022 - 07/05/2023	
	Export	YY variation	Import	YY variation	Export	Import	Export	Import
Common wheat	17 806 753	↓ -34%	6 770 885	↓ -15%	26 977 088	7 971 570	27 344 015	7 721 472
Common wheat flour (grain equivalent)	318 321	↓ -23%	252 002	↔ -0%	414 276	252 267	401 087	257 392
Durum wheat	464 690	↓ -27%	1 678 024	↓ -24%	640 935	2 212 735	616 786	1 558 098
Durum wheat meal (grain equivalent)	153 722	↓ -12%	3 429	↑ +25%	175 000	2 741	144 803	3 160
Total Wheat	18 743 486	↓ -34%	8 704 340	↓ -17%	28 207 299	10 439 314	28 506 691	9 540 121
Barley	4 149 404	↓ -22%	1 044 606	↓ -37%	5 318 251	1 650 900	5 812 001	1 762 429
Malt (grain equivalent)	2 586 502	↓ -1%	21 626	↓ -34%	2 612 808	32 991	2 724 961	25 795
Maize	1 902 840	↓ -46%	17 200 514	↑ +10%	3 500 650	15 653 580	2 706 007	23 502 072
Rye	74 344	↓ -58%	7 691	↓ -96%	177 699	189 732	130 974	107 322
Oats	68 738	↓ -25%	49 877	↓ -51%	91 121	101 020	59 884	141 877
Sorghum	11 847	↑ +162%	17 330	↑ +60%	4 525	10 852	10 436	31 811
Total Coarse grains	8 793 675	↓ -25%	18 341 645	↑ +4%	11 705 053	17 639 074	11 444 262	25 571 306
General Total	27 537 161	↓ -31%	27 045 985	↓ -4%	39 912 352	28 078 388	39 950 953	35 111 427

- Data per Member State (1/7/2024-4/5/2025) (all origins):

¹⁶ Taxud Surveillance database records and centralizes all trade data directly from the national customs authorities, however, for various reasons regular transmission could be delayed or interrupted and data could be incomplete (in particular for France, Ireland and Bulgaria for the last few months).

Import (tonnes)	Common wheat	Common wheat flour (grain equivalent)	Durum wheat	Durum wheat meal (grain equivalent)	Barley	Malt (grain equivalent)	Maize	Rye	Oats	Sorghum
BE	10 846	150	85 890	469	91 244	686	514 497		10 462	323
BG		580	22	6		3 086	149 866			
CZ	2 533	16 742		48	42	952	7 846		102	102
DK	2 901	168		2	6 206	193	18 713		39	2
DE	112 355	7 679	128	442	32 386	815	386 398	94	2 581	677
EE		21	139			1 143	3 273			
IE	99 044	122 149	5	95	134 144	1 542	1 001 956		4 866	27
EL	342 390	197	16 801	19	43 962	412	423 328			42
ES	3 490 734	2 545	132 584	286	316 425	286	6 574 504	7 172	28 677	1 418
FR	51 772	29 829	217	1 243	11 063	5 016	75 242		176	93
HR	14 234	23 663	1	38	8 005	140	5 726			
IT	1 460 706	3 867	1 370 663	239	25 142	786	2 373 705		1 236	11 356
CY	9 354	145		1	144 803	392	229 319			
LV	45	793	37 051	2		25	2 287			
LT	766	1 106		11		368	8 184			
LU		25								
HU		6 373		14		11	79 779		667	3
MT	9 624	77		33	46		690		2	
NL	204 288	6 952	1	362	114 589	576	2 977 648	23	632	812
AT	1 250	317		9		6	182 950			
PL	67	245	1 323	29		1 870	54 435		22	2 204
PT	250 579	8	28 361	11	29 631	250	1 256 458			272
RO	358 871	24 267	856	4	54 360	1 603	79 375	393	49	
SI	348 478	1 159	3 895	1	23 477	426	790 381		324	
SK	25			8		2				
FI		43				84	74			
SE	23	2 900	87	57	9 081	957	3 881	8	42	
EU	6 770 885	252 002	1 678 024	3 429	1 044 606	21 626	17 200 514	7 691	49 877	17 330

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



4. EU oilseeds trade (data from TAXUD surveillance)¹⁷ (1/7/2024-4/5/2025)
(all origins)

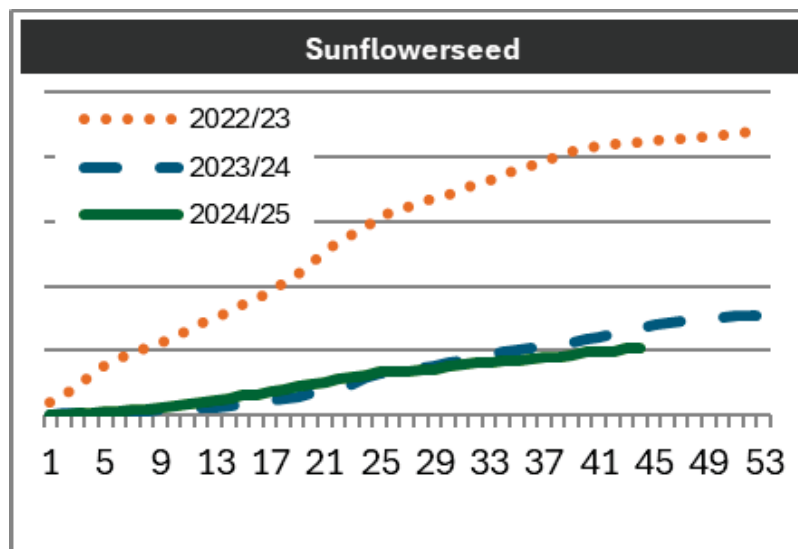
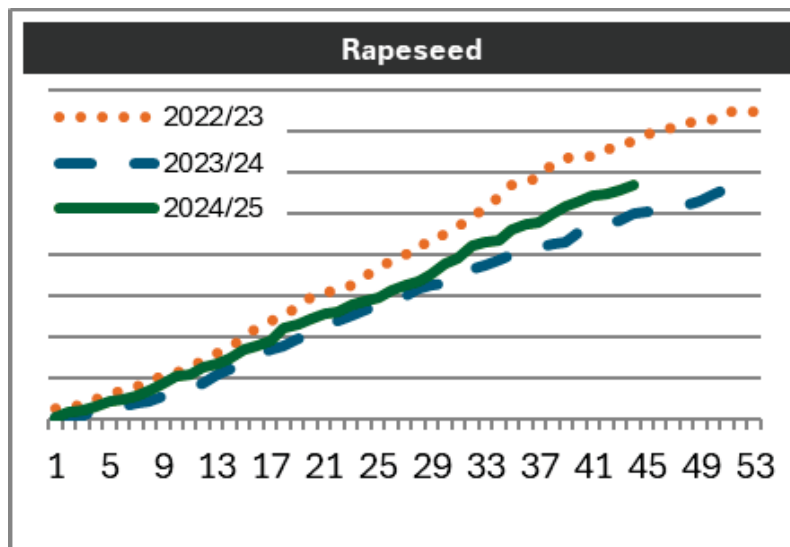
(tonnes)	EU 01/07/2024 - 04/05/2025				EU 01/07/2023 - 05/05/2024		EU 01/07/2022 - 07/05/2023	
	Export	Y/Y	Import	Y/Y	Export	Import	Export	Import
Soyabeans	355 369	↑ +82%	11 726 294	↑ +7%	195 711	10 916 234	205 615	10 636 335
Rapeseed	313 033	↓ -33%	5 680 805	↑ +14%	465 637	5 001 862	504 319	6 798 349
Sunflowerseed	484 790	↑ +17%	520 614	↓ -23%	413 761	675 960	457 164	2 115 275
Total seeds	1 153 192	↑ +7%	17 927 713	↑ +8%	1 075 109	16 594 055	1 167 099	19 549 959
Soyameal	399 950	↔ +0%	15 769 994	↑ +24%	398 774	12 740 521	473 451	13 178 642
Rapeseed meal	621 766	↔ +0%	282 777	↓ -62%	619 303	750 959	674 608	679 718
Sunflowerseed meal	302 770	↓ -32%	1 987 356	↓ -28%	444 802	2 758 486	847 130	2 317 089
Total meals	1 324 486	↓ -9%	18 040 127	↑ +11%	1 462 880	16 249 966	1 995 189	16 175 449
Soyaoil	576 231	↑ +6%	253 515	↓ -47%	545 008	480 762	734 642	397 169
Rapeseed oil	474 597	↓ -18%	215 636	↓ -48%	577 901	416 300	577 047	348 909
Sunflowerseed oil	466 185	↓ -31%	1 922 026	↓ -22%	671 915	2 474 793	1 034 137	1 570 319
Palm oil	328 810	↑ +26%	2 429 966	↓ -18%	261 317	2 958 929	141 444	3 616 096
Total oils	1 269 592	↓ -16%	4 567 628	↓ -22%	1 511 133	5 850 022	1 752 628	5 535 323
General Total	3 747 270	↓ -7%	40 535 468	↑ +5%	4 049 121	38 694 044	4 914 915	41 260 731

- Data per Member State (1/7/2024-4/5/2025) (all origins):

Import (tonnes)	Soyabeans	Rapeseed	Sunflower-seed	Soyameal	Rapeseed meal	Sunflower-seed meal	Soyaoil	Rapeseed oil	Sunflower-seed oil	Palm oil
BE	329 552	1 720 069	2 080	407 708		5 112	217	59 408	12 842	72 208
BG	29	153 075	124 529	9 072		23	27 668	7 667	148 980	965
CZ	11 994	122 621	7 178	6 499	22	1 735	4 659	194	10 009	56
DK	7 462		163	777 531		56 187	27 553	248	1 284	65 624
DE	2 004 868	1 095 675	21 279	1 253 205	10 062	25 372	4 778	1 116	10 304	189 400
EE		4 879	1 603	575	2 162	10 026	300	46	1 231	115
IE	8 776	137	407	360 817	40	6 471	27 052	4 338	2 220	49 470
EL	202 414	184 727	12 438	507 535	2 272	20 845	14 720	4 380	22 499	107 236
ES	2 882 695		51 677	2 403 021	105 962	142 588	5 225	15 142	550 560	243 434
FR	544 523	703 780	64 538	1 698 092	25 387	401 902	753	1 388	144 322	23 392
HR	465	4 066	271	1 183		1 291	3 495	837	17 394	6 826
IT	1 709 439	270	2 462	1 555 667	5 456	207 804	4 376	17 160	338 382	739 816
CY			92	116 773		12 660	2 152	667	6 296	105
LV		35 570	451	12 328	26 839	23 540	1 489	3 445	5 732	153
LT		91	2 627	28 347	17 021	6 673	2 884	16 982	14 741	1
LU									63	
HU	62 010	11 568	1 893	193 501	41 139	141	3 393	147	368	2 670
MT	3				195	140	89	10	1 712	324
NL	2 693 110	1 462 986	18 847	1 998 813	4 534	517 773	23 145	68 519	361 499	842 346
AT	38 675	8 426	2 404	3 216		1	72	2 215	19 449	1 117
PL	179 963	28 493	9 182	2 925 454	30 644	435 187	53 948	2 049	15 686	2 675
PT	746 417	69 164	21 067	149 796				12	42 345	4 381
RO	202 828	65 739	172 288	510 661	1 023	5 511	13 659	30	55 380	8 818
SI	99 293		230	723 577	7 772	86 160	11 354	6 081	125 042	2 782
SK	266	4	510			24	963		7 711	
FI	506		1 448	3 126		3 464		25	366	12
SE	1 005	9 463	948	123 498	2 245	16 725	19 572	3 530	5 610	66 040
EU	11 726 294	5 680 805	520 614	15 769 994	282 777	1 987 356	253 515	215 636	1 922 026	2 429 966

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

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



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

- Cereals

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

Table 1. Ukrainian cereals exports since April 2022								
Quantity in tonnes	April 2022 - October 2024	November 2024	December 2024	January 2025	February 2025	March 2025	April 2025	Total 1 April 2022 - 30 April 2025
MAIZE	66 487 194	2 553 100	2 612 882	2 483 558	2 173 813	2 391 450	1 567 578	80 269 574
WHEAT	43 364 080	1 325 290	800 615	891 180	1 179 185	1 129 723	771 116	49 461 190
BARLEY	6 959 212	155 150	121 987	64 906	62 276	68 667	47 273	7 479 471
TOTAL CEREALS	116 810 486	4 033 541	3 535 484	3 439 644	3 415 275	3 589 839	2 385 967	137 210 235

Source: Ukrainian State Customs Service

EU imports from Ukraine based on the TAXUD surveillance system.

Table 2. EU cereals imports from Ukraine since April 2022								
Quantity in tonnes	April 2022 - October 2024	November 2024	December 2024	January 2025	February 2025	March 2025	April 2025	Total 1 April 2022 - 30 April 2025
MAIZE	33 648 325	1 082 474	1 036 018	1 344 465	1 194 125	1 084 607	561 576	39 951 590
WHEAT	14 903 112	366 289	364 849	470 308	322 803	399 391	172 447	16 999 198
BARLEY	2 000 301	58 775	25 846	12 746	15 955	8 859	18 717	2 141 200
TOTAL CEREALS	50 551 738	1 507 537	1 426 713	1 827 520	1 532 883	1 492 857	752 740	59 091 989

Source: TAXUD Surveillance System

- Oilseeds and oilseeds products

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

Table 3. Ukrainian oilseeds and oilseeds products exports since April 2022								
Quantity in tonnes	April 2022 - October 2024	November 2024	December 2024	January 2025	February 2025	March 2025	April 2025	Total 1 April 2022 - 30 April 2025
Rapeseed	9 456 060	327 024	213 352	102 853	30 148	32 474	84 365	10 246 276
Sunflowerseed	3 741 158	1 404	1 085	20 120	979	24 100	979	3 789 825
Soyabeans	7 737 179	466 058	359 628	223 034	381 578	369 156	330 187	9 866 821
Rapeseed oil	691 728	9 385	7 556	1 483	1 271	854	2 258	714 535
Sunflower oil	13 986 948	482 782	378 783	378 115	324 542	440 772	478 241	16 470 184
Soyaoil	777 968	48 833	33 709	42 972	59 109	53 828	45 207	1 061 626
Sunflower & Rapeseed meals	10 569 051	298 073	416 790	274 134	197 854	346 699	307 216	12 409 816
Soyameal	1 450 012	85 252	102 316	132 185	149 807	146 789	115 787	2 182 148
TOTAL OILSEEDS & PRODUCTS	48 410 104	1 718 812	1 513 219	1 174 896	1 145 287	1 414 673	1 364 240	56 741 231

Source: Ukrainian State Customs Service

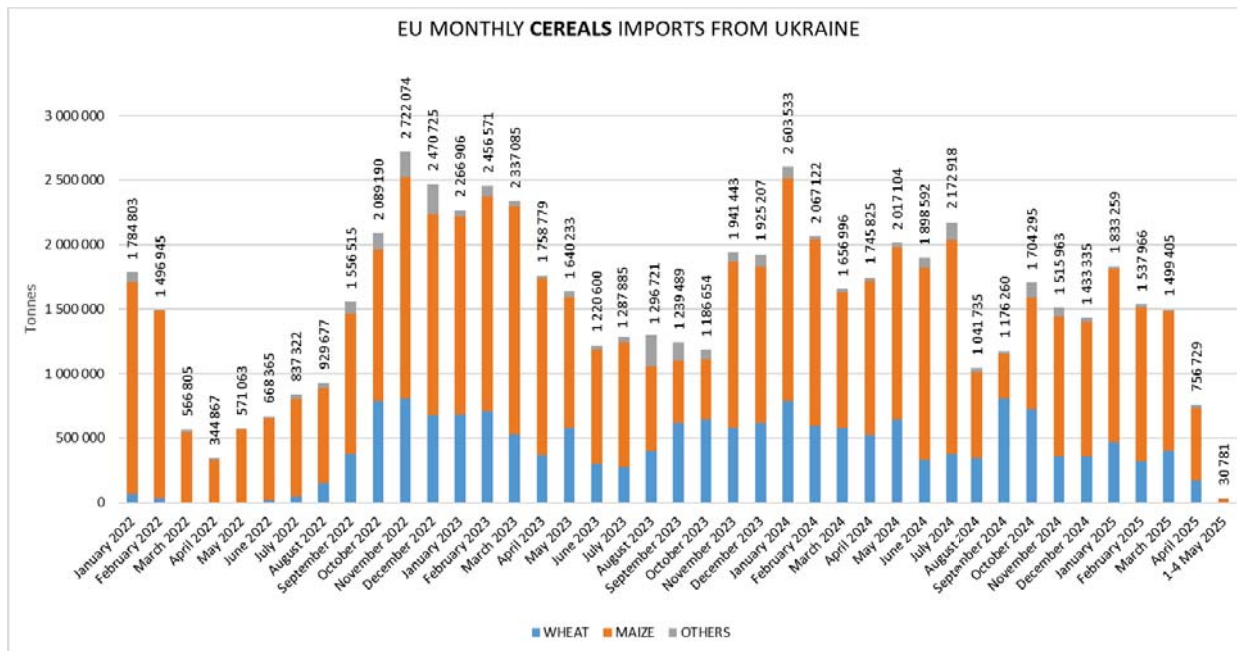
EU imports from Ukraine based on the TAXUD surveillance system.

Table 4. EU oilseeds and oilseeds products imports from Ukraine since April 2022								
Quantity in tonnes	April 2022 - October 2024	November 2024	December 2024	January 2025	February 2025	March 2025	April 2025	Total 1 April 2022 - 30 April 2025
Rapeseed	7 702 902	253 164	222 227	185 880	99 811	35 323	25 219	8 524 526
Sunflowerseed	2 563 354	1 118	1 146	13 667	6 177	23 519	761	2 609 742
Soyabeans	2 825 226	202 243	180 255	116 530	147 605	145 437	141 404	3 758 699
Rapeseed oil	292 349	13 544	700	482	849	762	940	309 626
Sunflower oil	5 420 692	184 746	187 022	182 265	184 226	250 876	177 697	6 587 524
Soyaoil	514 951	3 898	5 653	3 458	8 003	24 996	43 834	604 794
Sunflower & Rapeseed meals	3 607 255	217 538	123 898	212 092	129 877	118 919	114 780	4 524 359
Soyameal	1 134 401	69 711	69 173	98 520	159 288	102 881	85 486	1 719 461
TOTAL OILSEEDS & PRODUCTS	24 061 130	945 962	790 075	812 894	735 836	702 713	590 121	28 638 732

Source: TAXUD Surveillance System

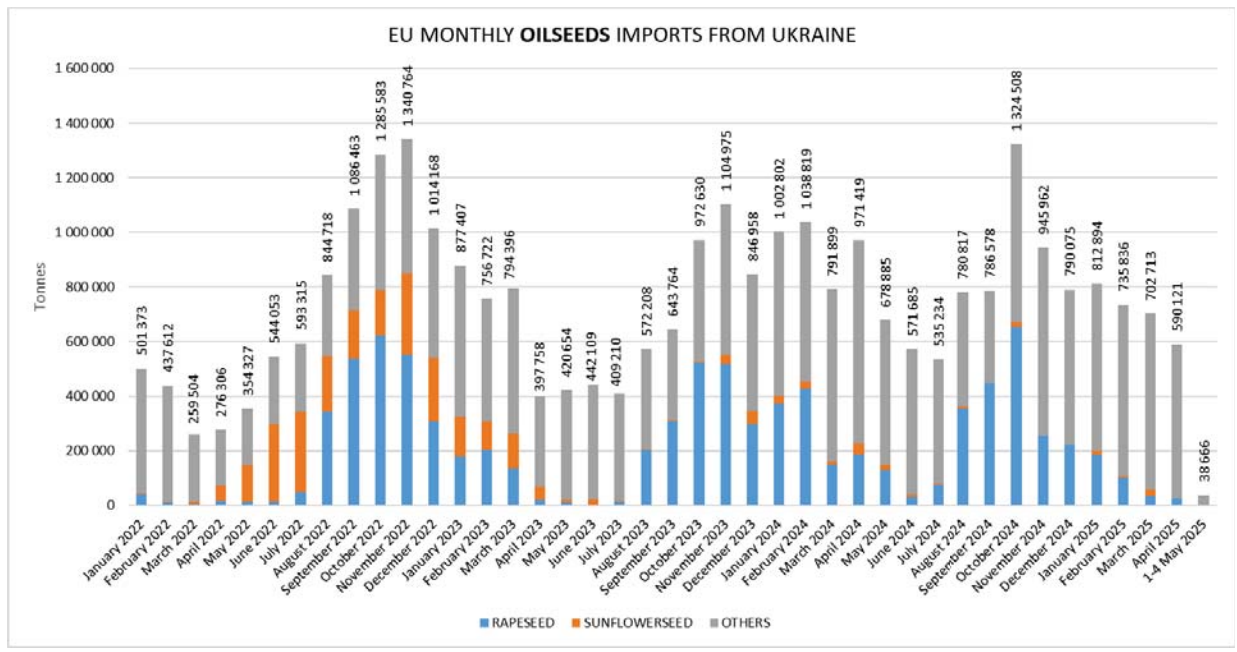
Monthly EU imports of cereals and oilseeds from Ukraine (data from TAXUD surveillance from 1/1/2022 to 4/5/2025)

- EU cereals imports from Ukraine:



Source: TAXUD Surveillance System

- EU oilseeds imports from Ukraine

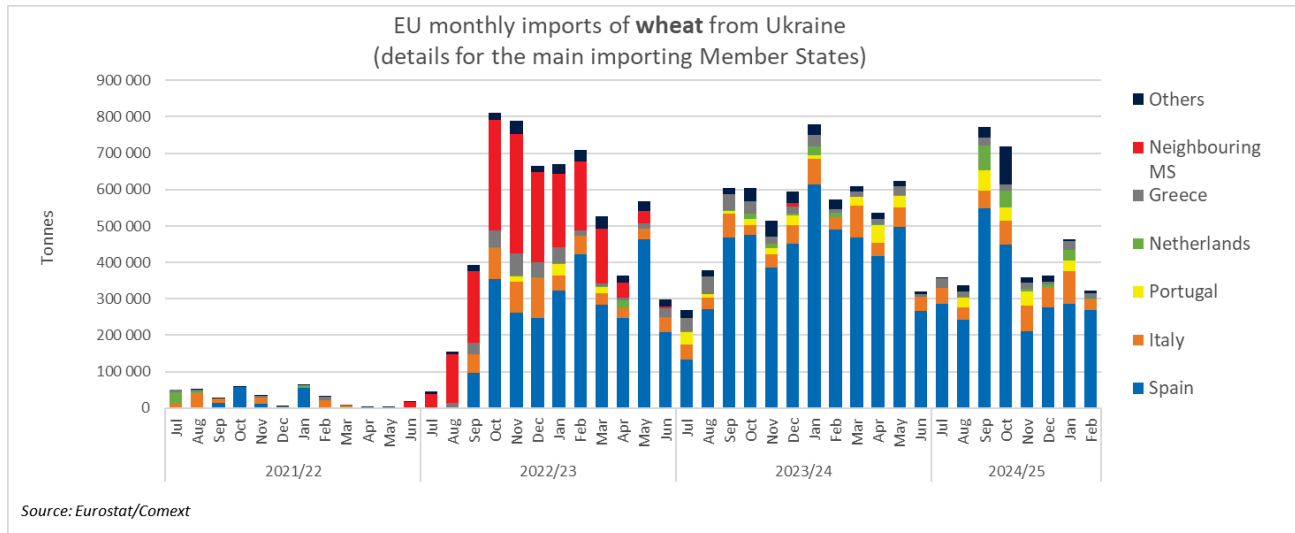


Source: TAXUD Surveillance System

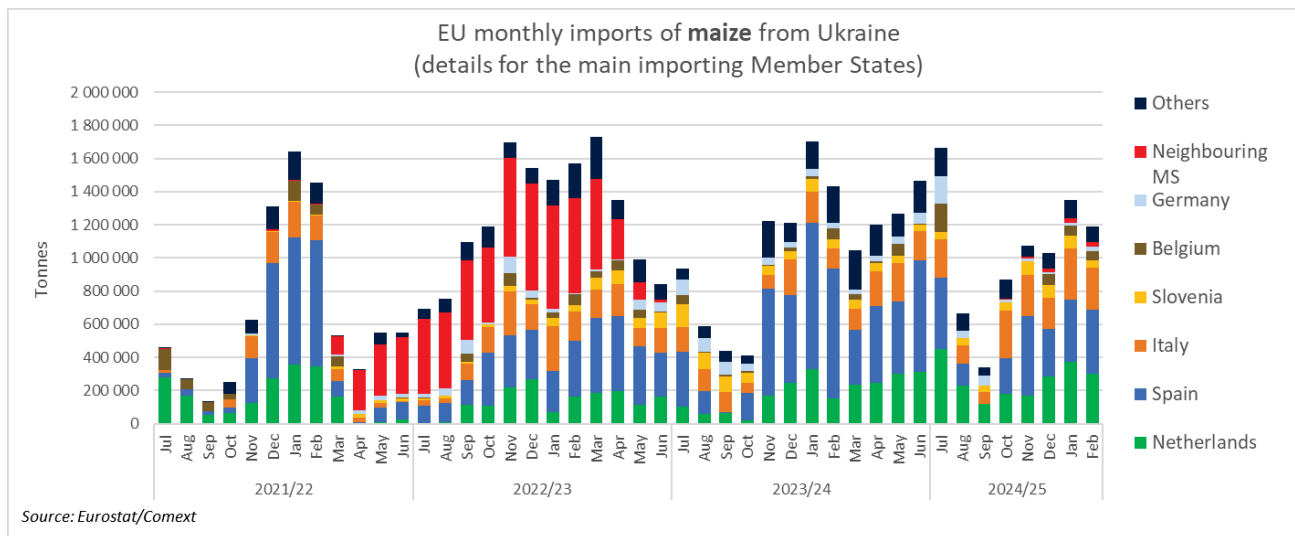
6. Main importing Member States (data based on Eurostat/Comext)

Details for the main importing EU Member States for the period 1/7/2021 to 28/2/2025.

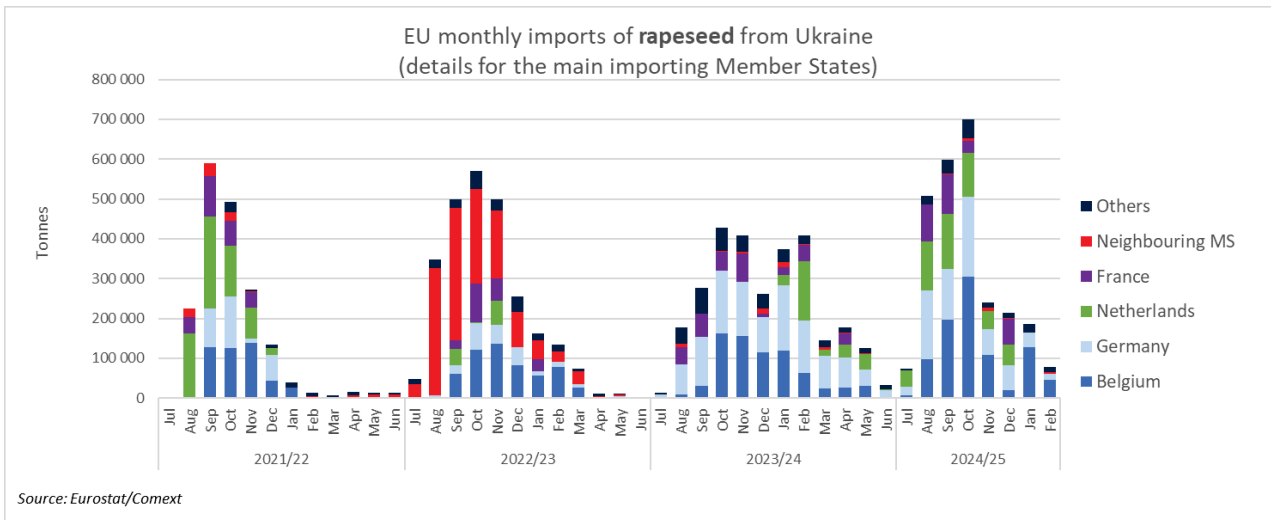
- EU monthly imports of **wheat** from Ukraine



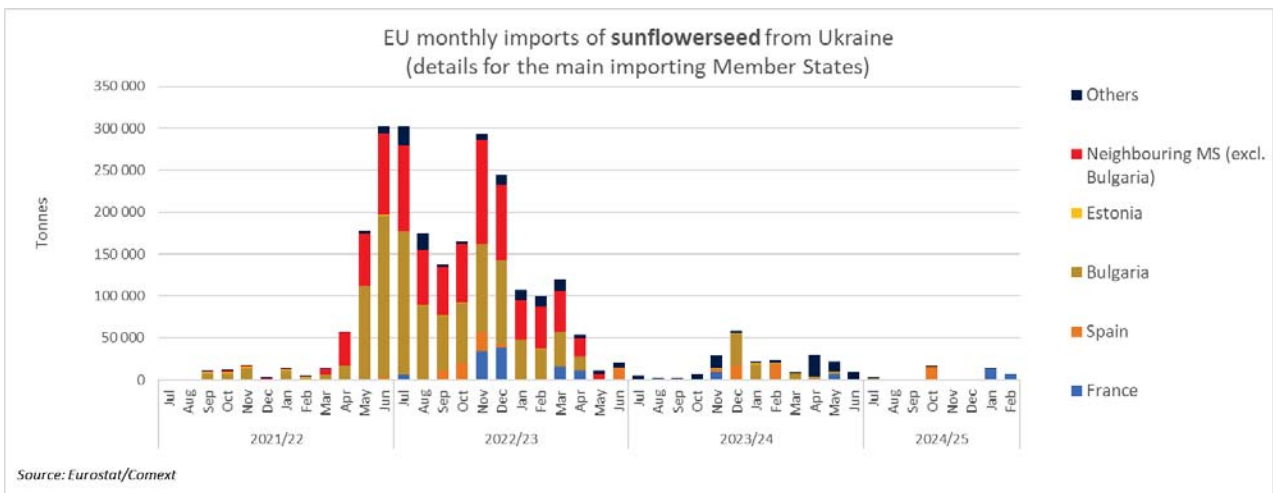
- EU monthly imports of **maize** from Ukraine



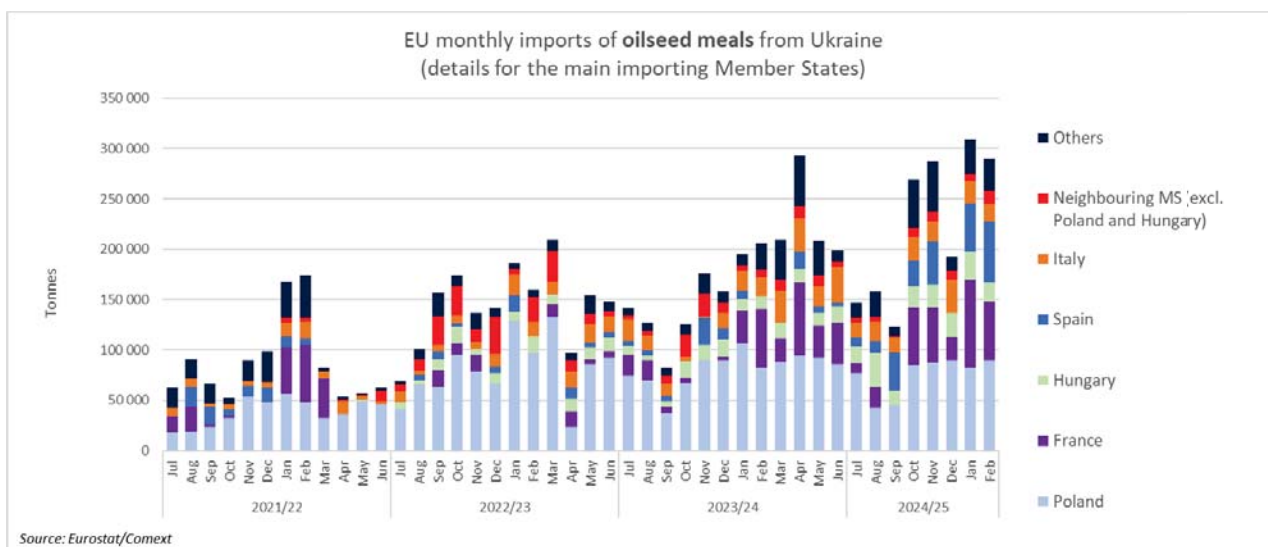
- EU monthly imports of **rapeseed** from Ukraine



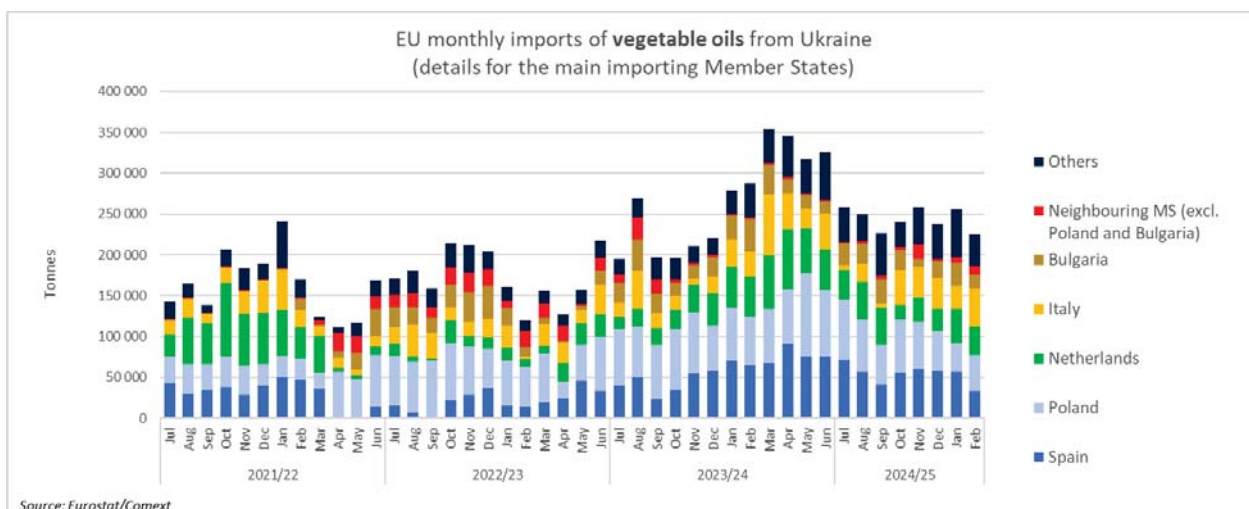
- EU monthly imports of **sunflower seed** from Ukraine



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

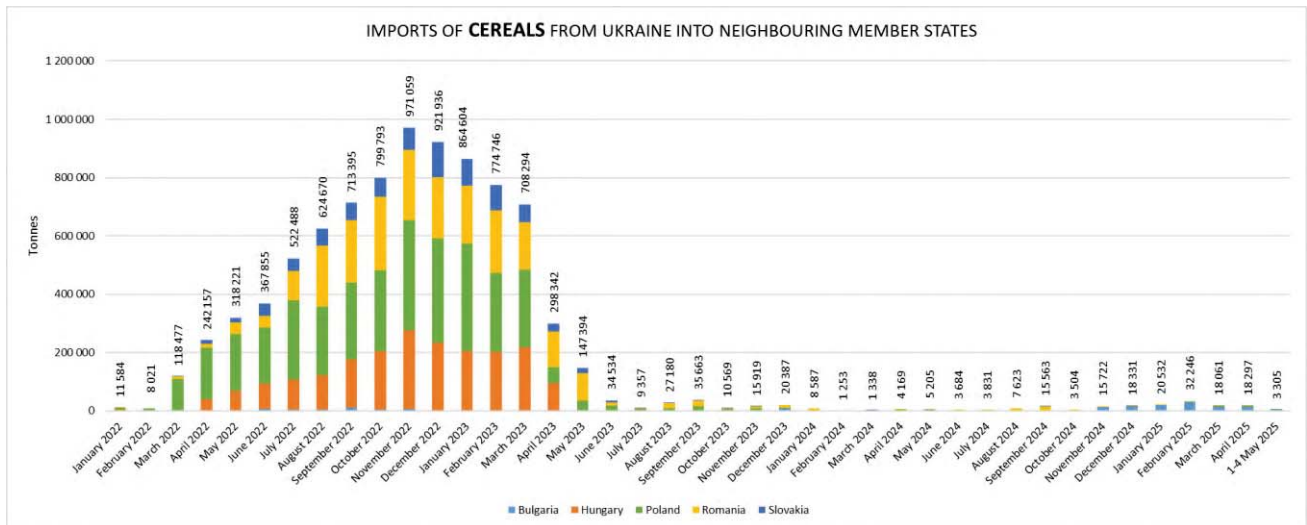


- EU monthly imports of **vegetable oils** from Ukraine



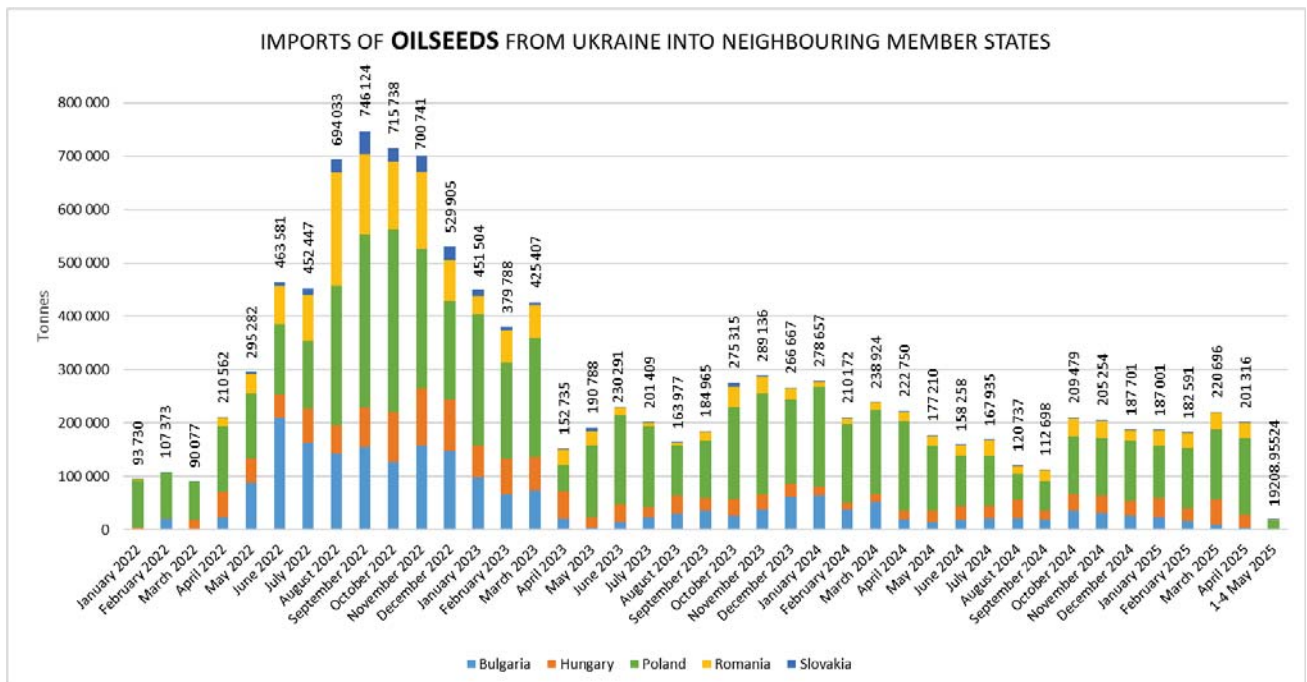
7. Imports into Member States neighbouring Ukraine (from 1/1/2022 to 4/5/2025)

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



Source: TAXUD Surveillance System

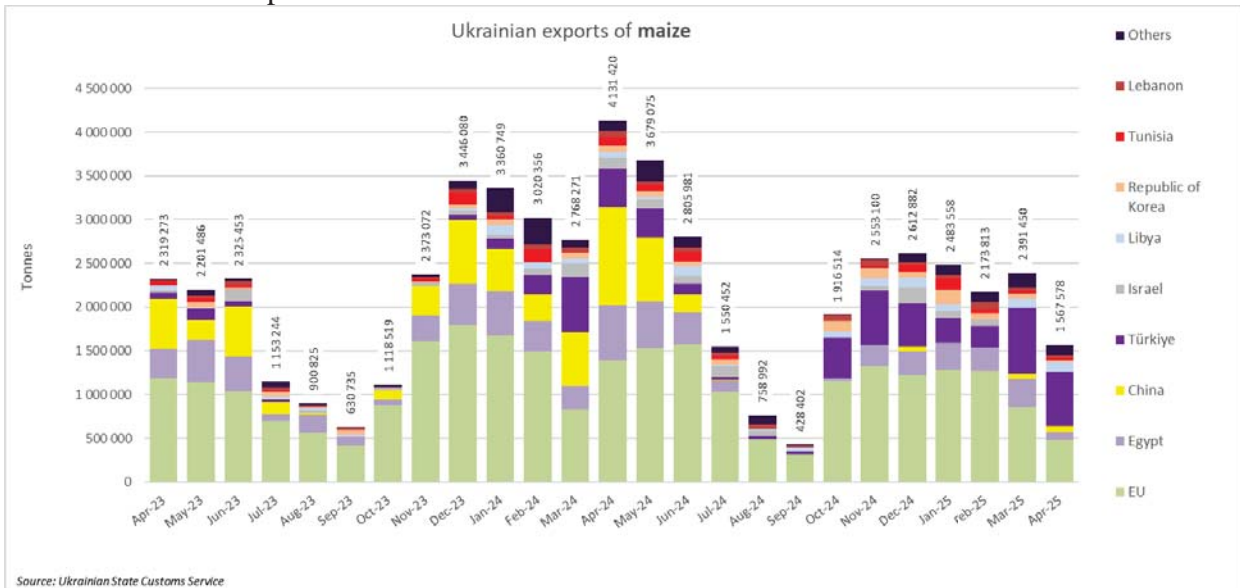
- **Oilseeds** imports from Ukraine by the five neighbouring Member States



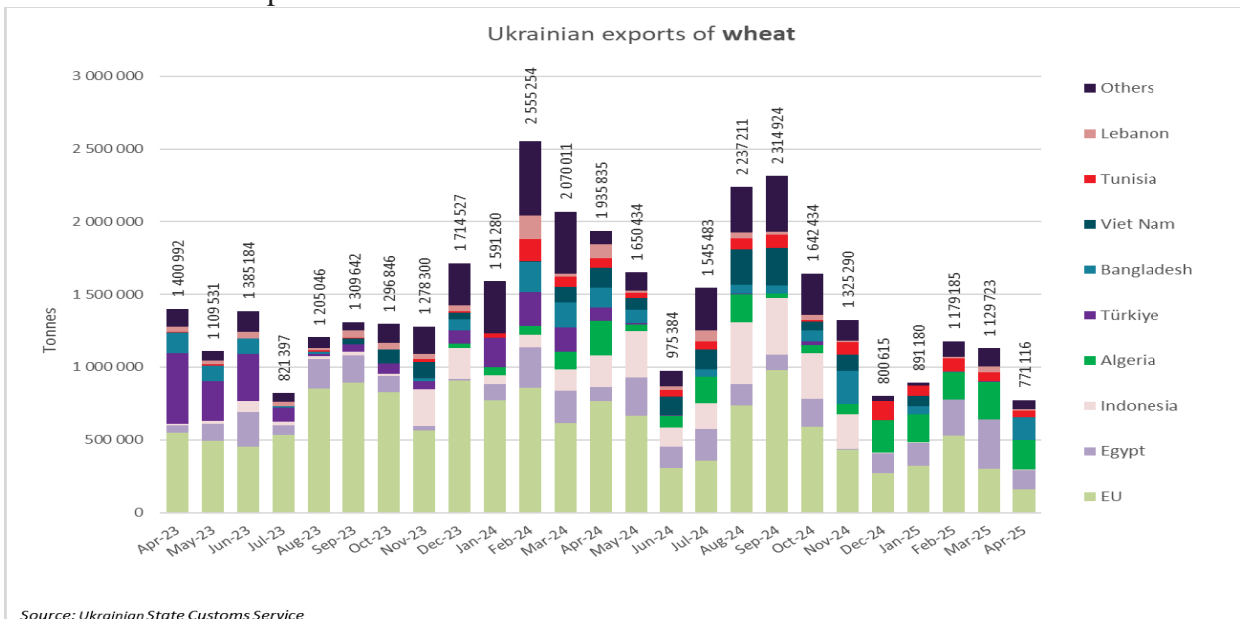
Source: TAXUD Surveillance System

8. Ukrainian export destinations (data is based on the Ukrainian State Customs Service¹⁸)

- Ukrainian exports of maize



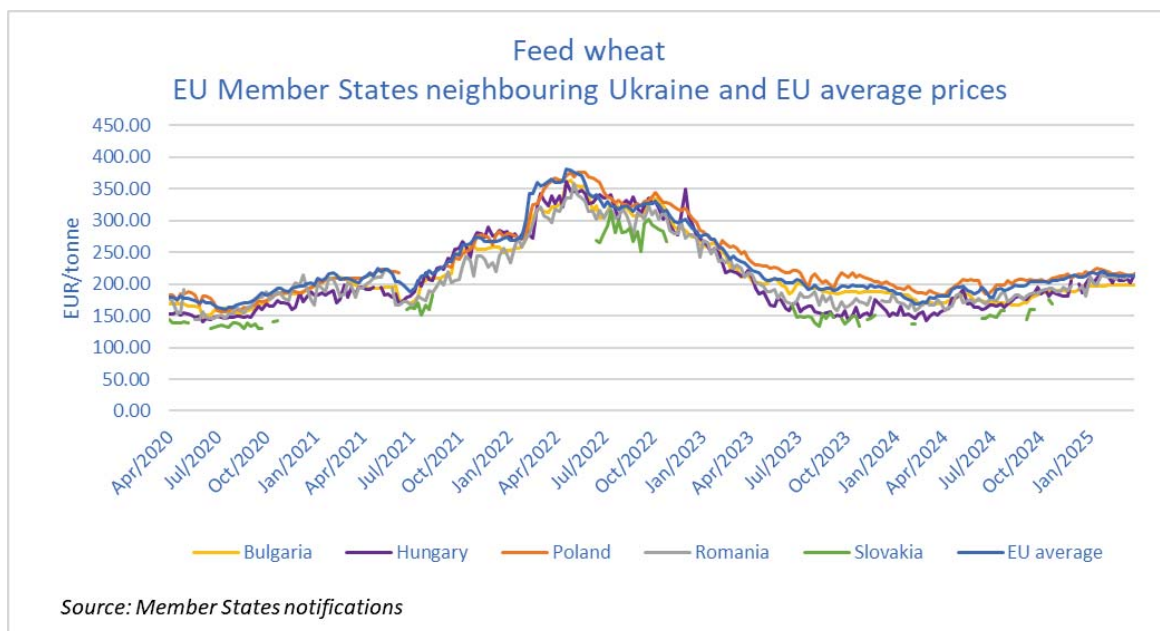
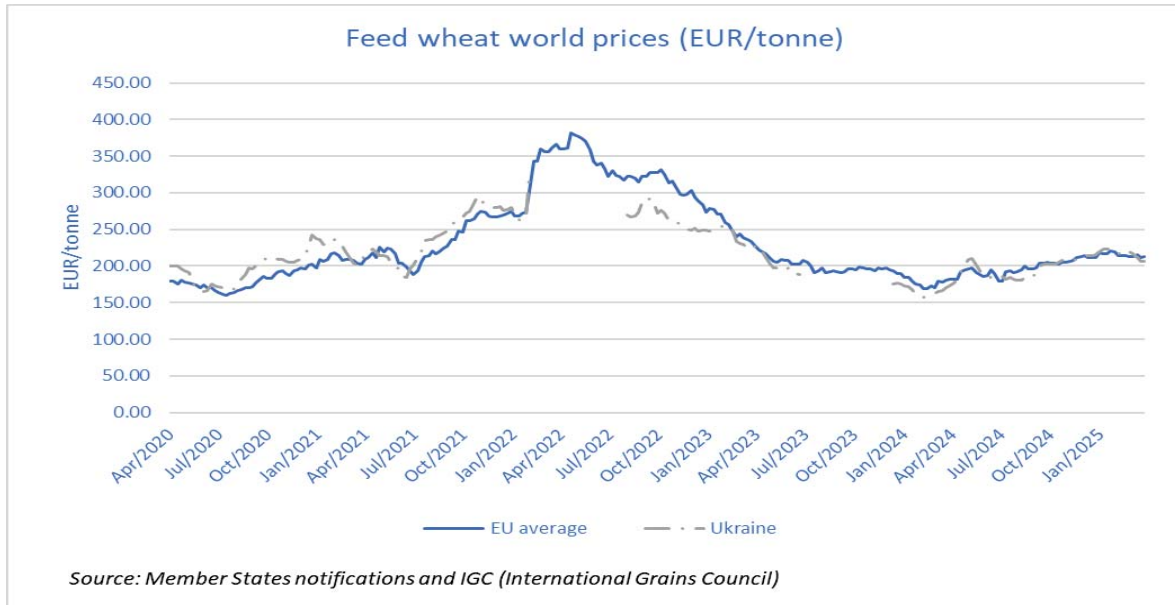
- Ukrainian exports of wheat



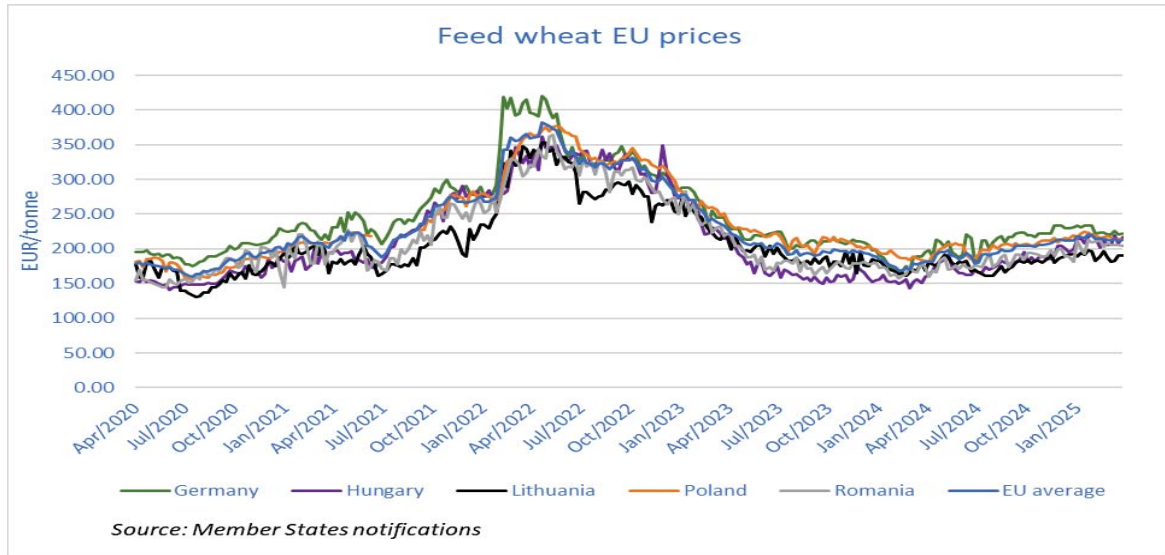
¹⁸ What is declared as destined for the EU is not necessarily imported into the EU. Some declarations indicate the EU as the final destination but the products only transit through the EU. For example, during a period of 1 July to 31 December 2023 there were 11.25 million tonnes of maize, wheat and barley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

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

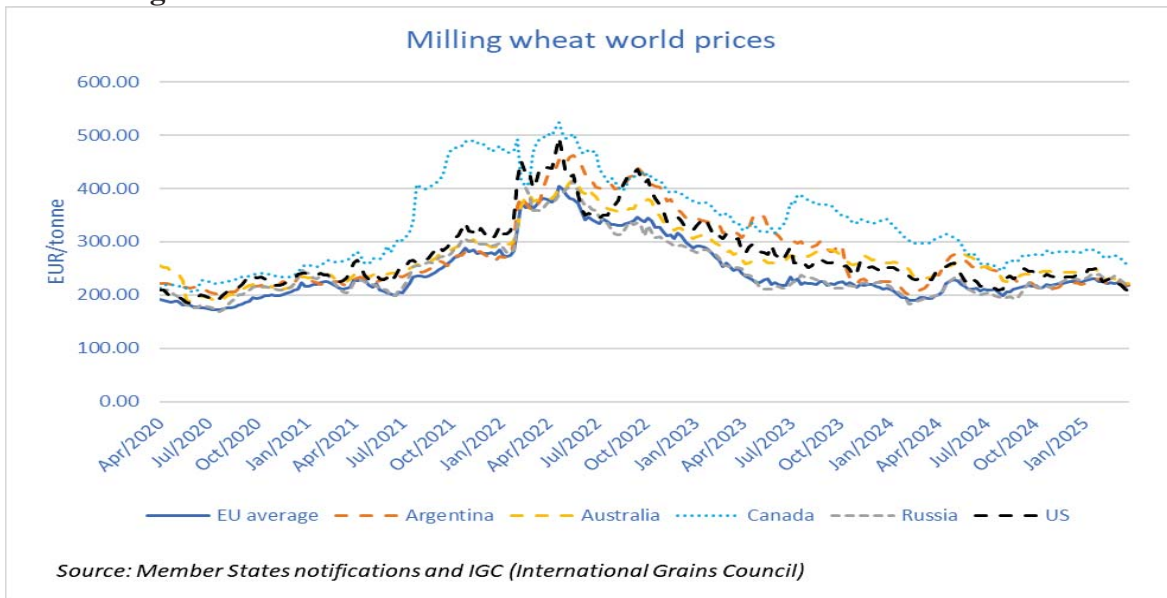
• Feed Wheat¹⁹



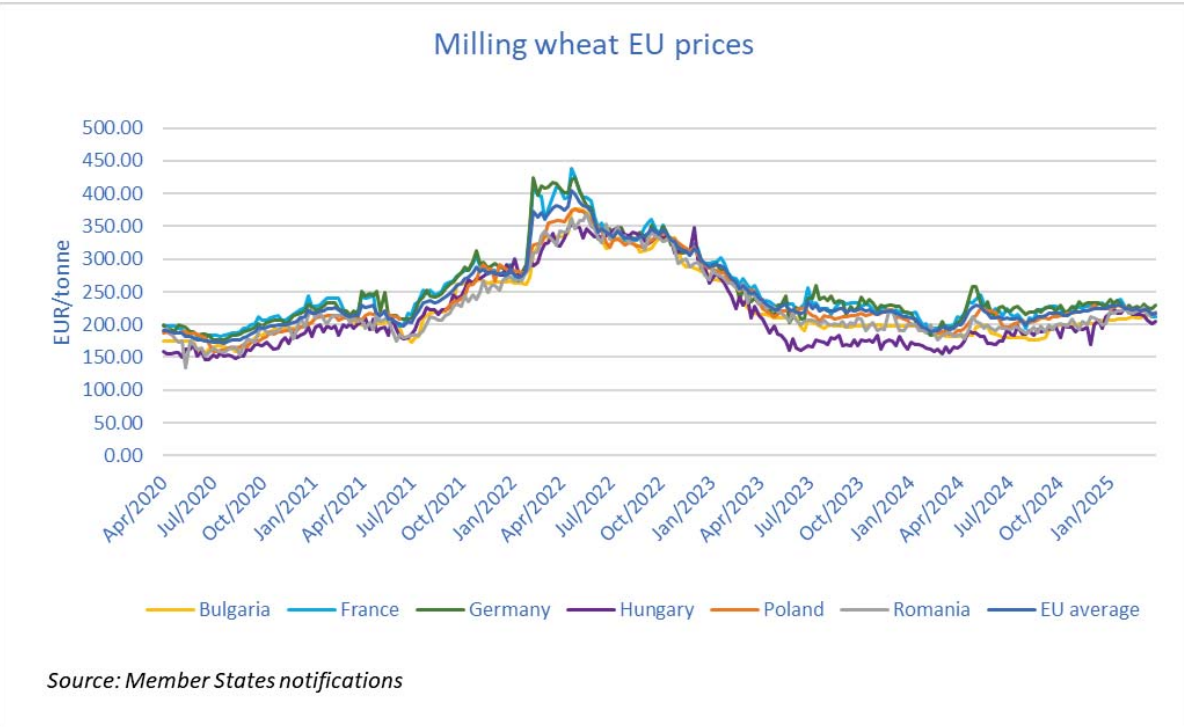
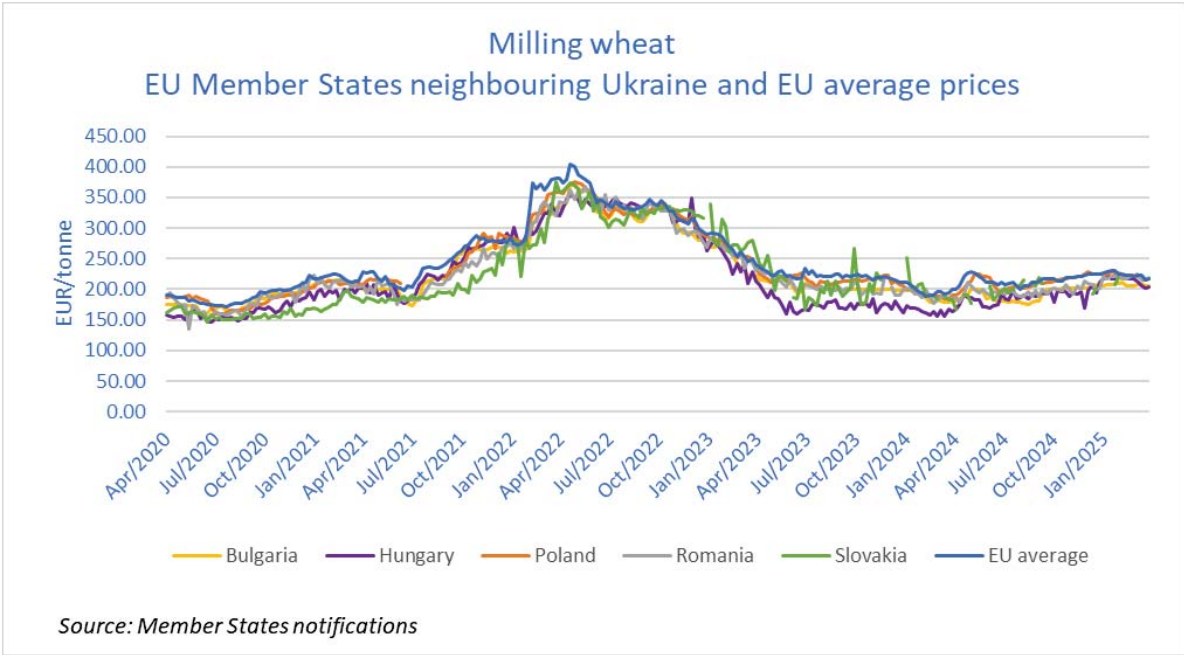
¹⁹ EU average feed wheat price is based on prices of major soft wheat producing Member States: BG, DE, HU, LT and PL (FR representative price not available). The prices are weighted based on these Member States soft wheat five-year trimmed average production.



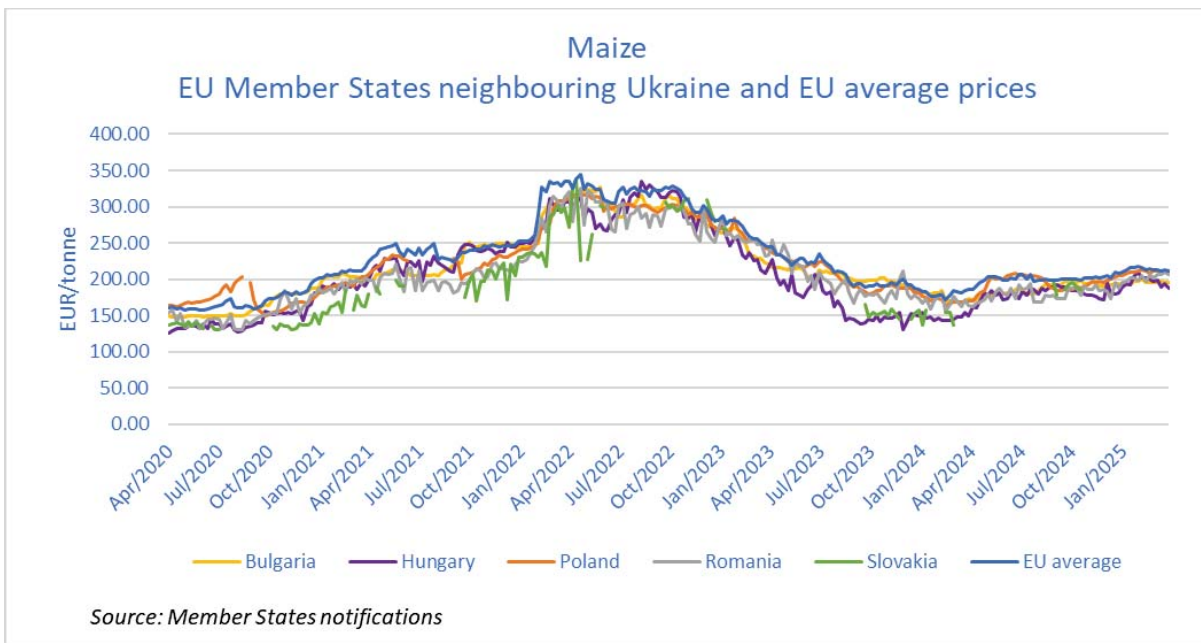
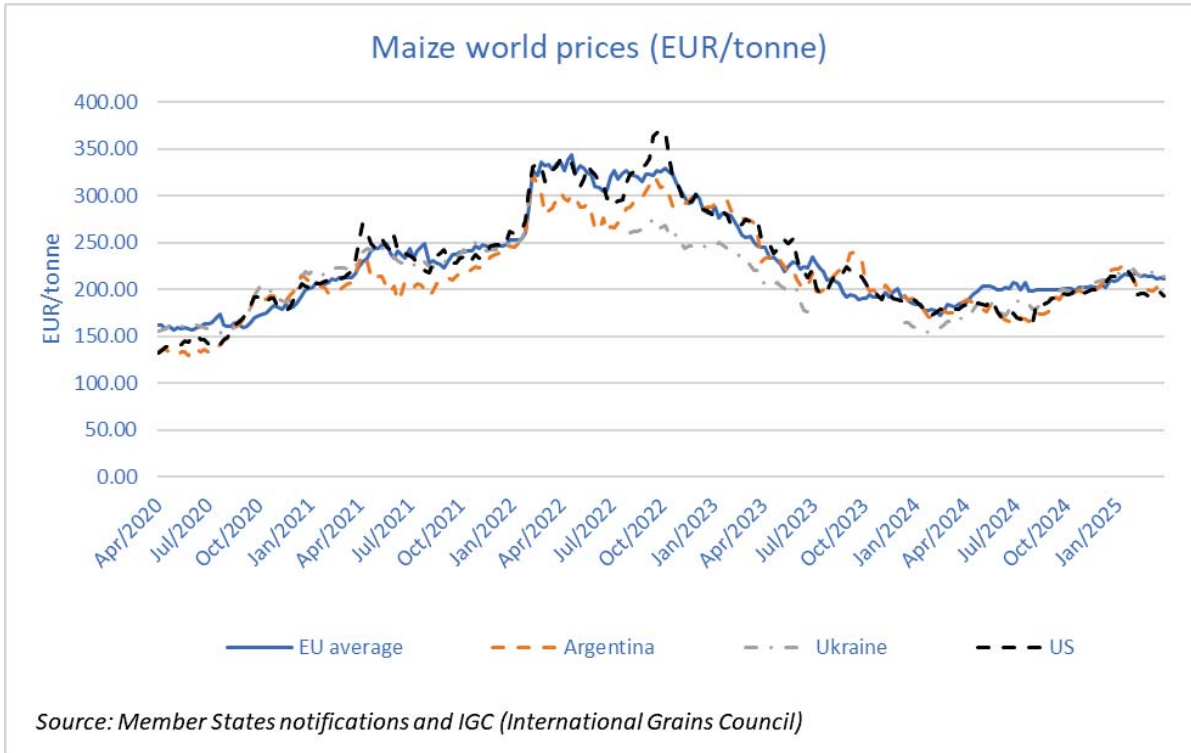
• **Milling wheat²⁰**



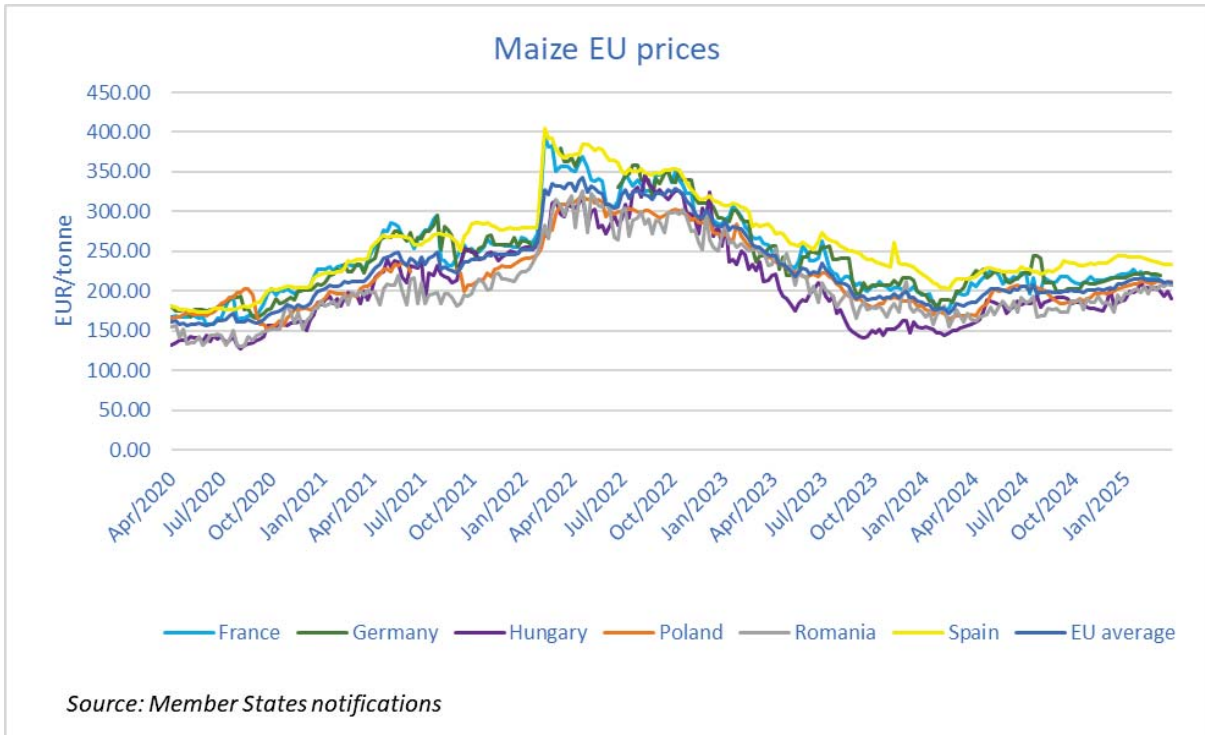
²⁰ EU average milling wheat price is based on prices of major wheat producing Member States: BG, CZ, FR, DE, HU, LT, PL, RO, ES and SE. The prices are weighted based on these Member States soft wheat five-year trimmed average production.



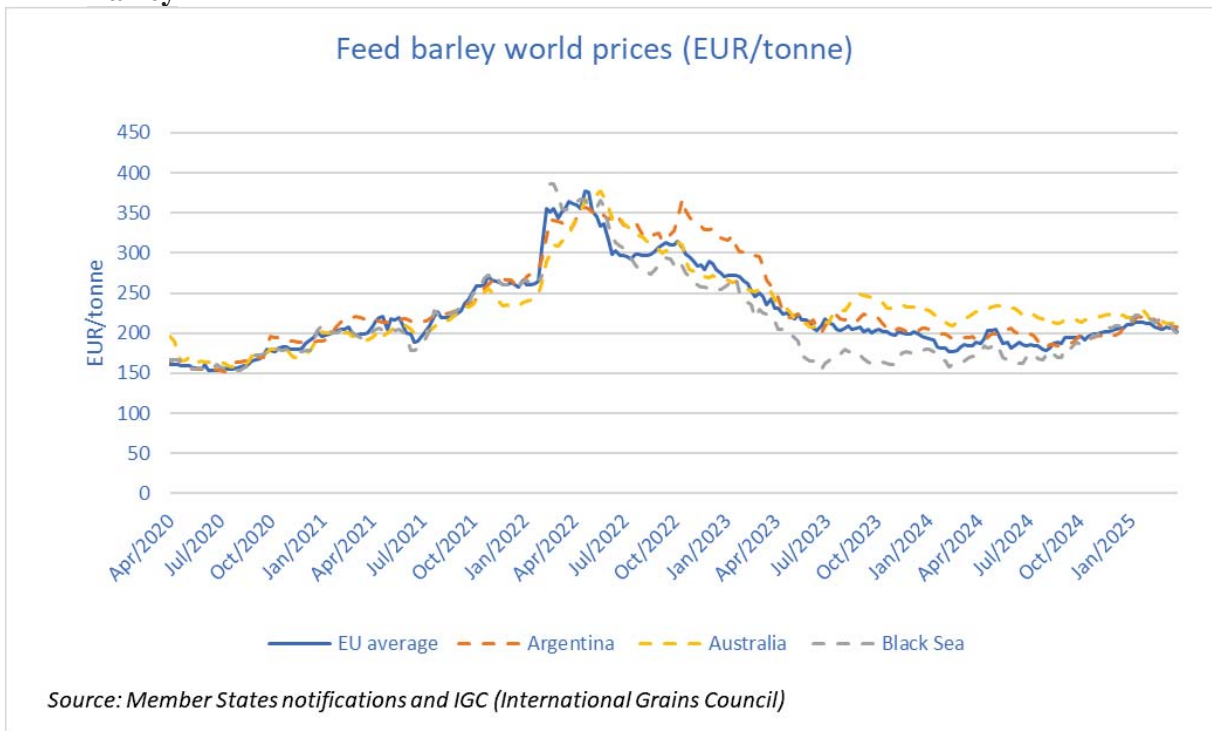
- **Maize**²¹



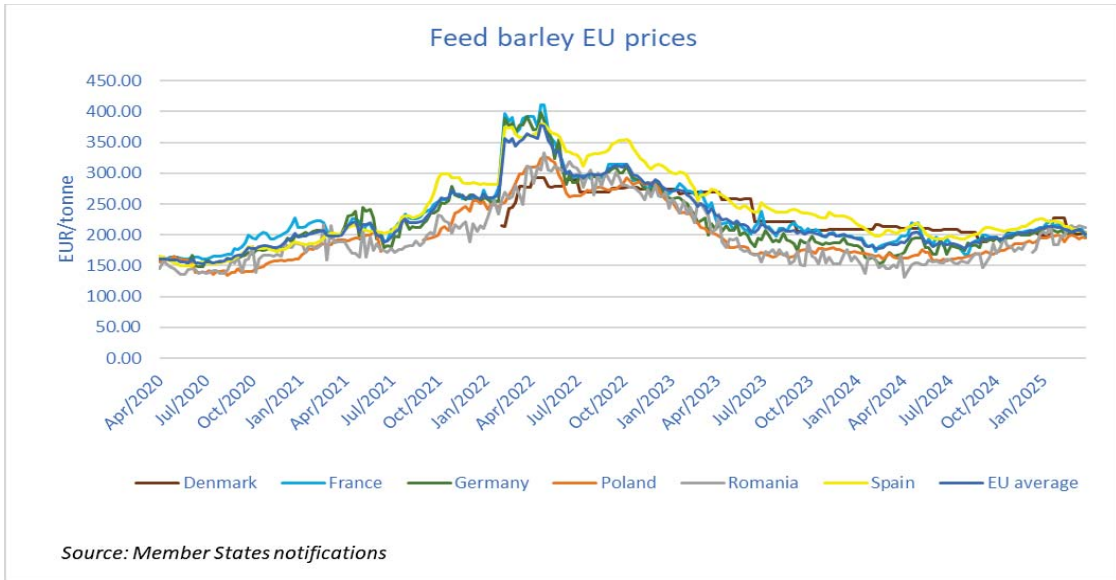
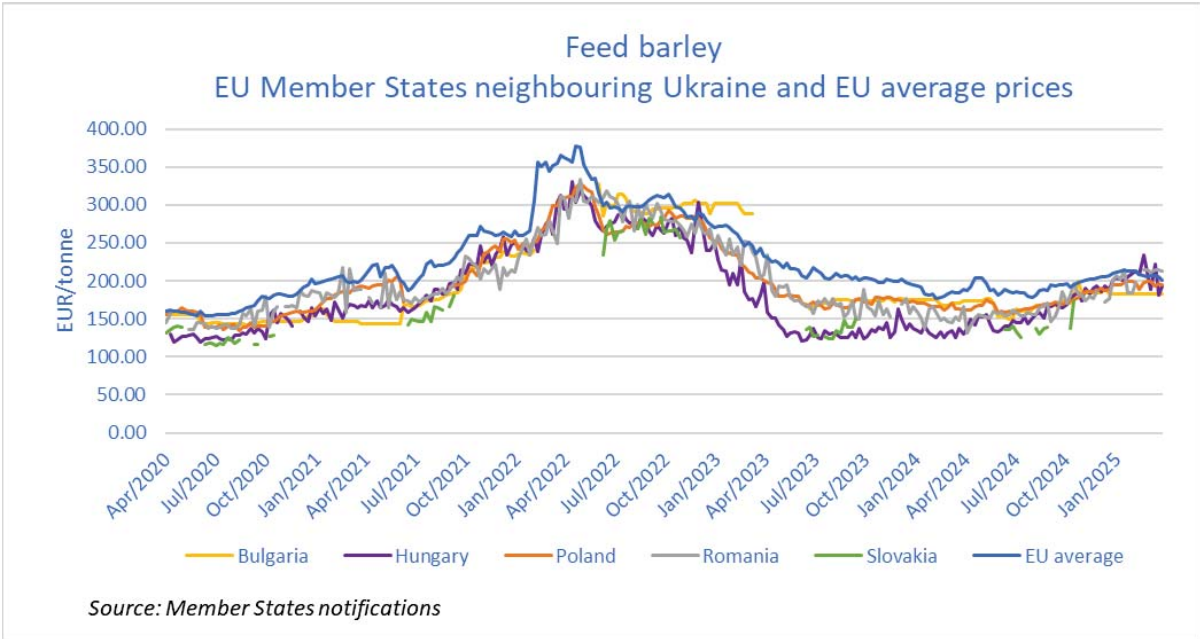
²¹ EU average maize price is based on prices of major maize producing Member States: AT, BG, HR, FR, DE, HU, IT, PL, RO and ES. The prices are weighted based on these Member States five-year trimmed average maize production.



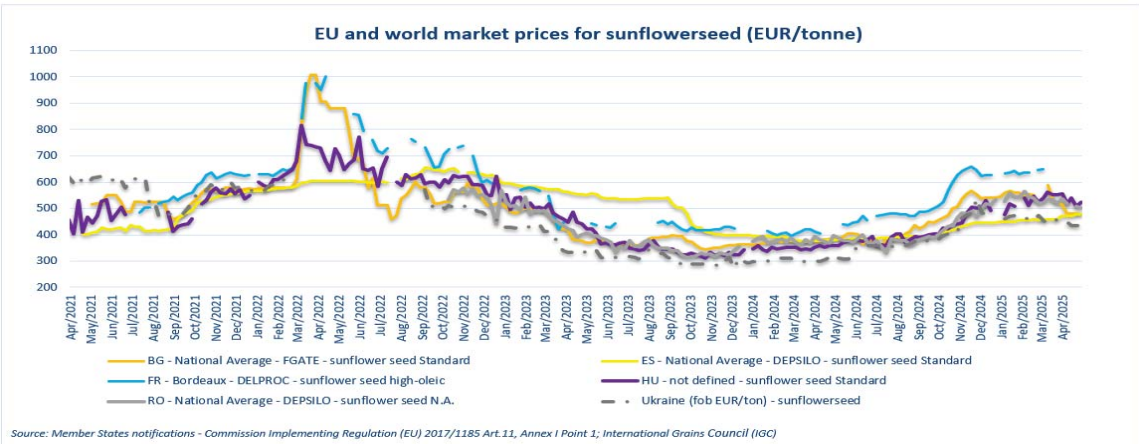
- **Barley²²**



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

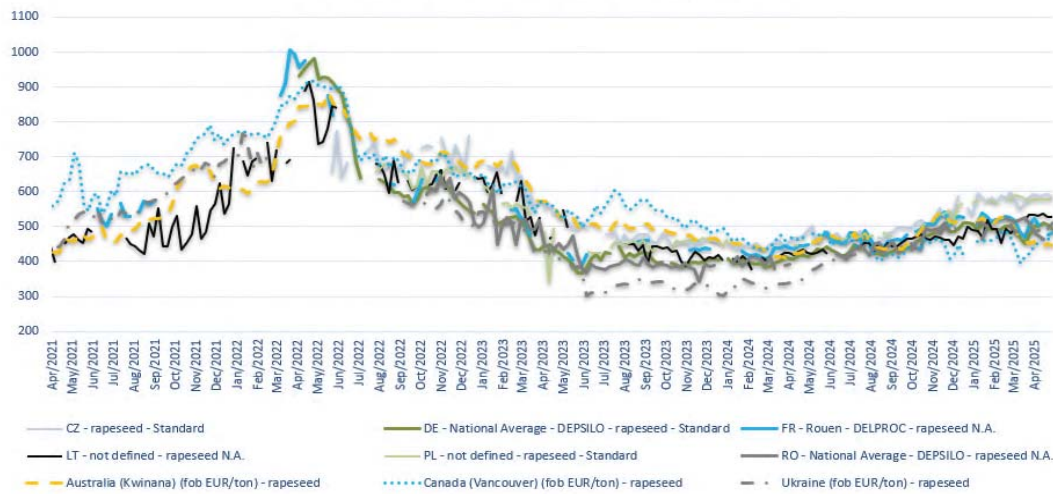


- **Sunflower seeds**



- **Rapeseeds**

EU and world market prices for rapeseed (EUR/tonne)



Source: Member States notifications - Commission implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1; International Grains Council (IGC)