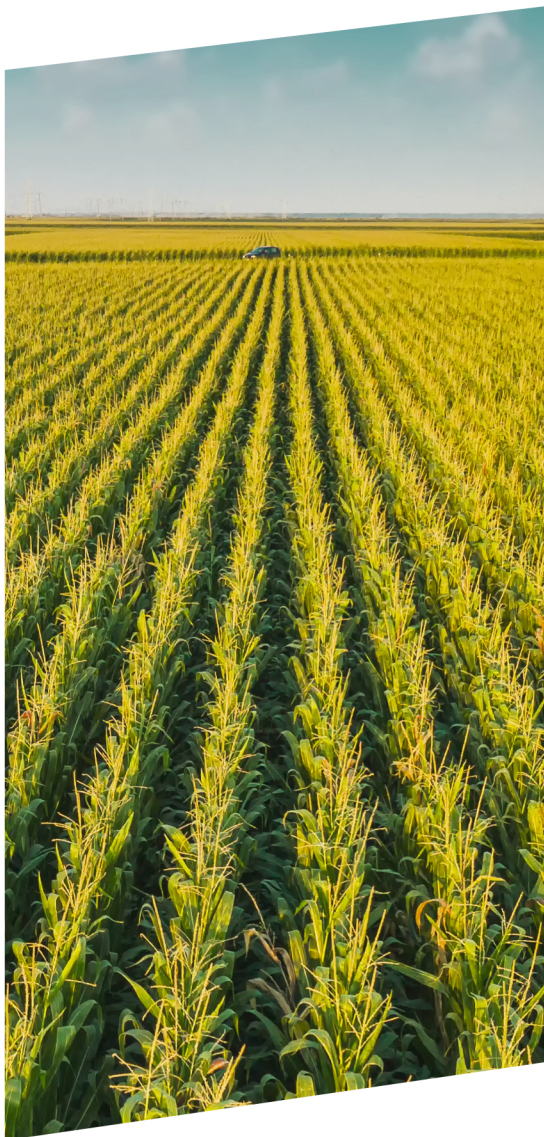


NON-GMO SOY NON-GMO MAIZE NON-GMO RAPESEED



HIGHLIGHTS

The following points summarise the major trends and recent developments that affect the EU Non-GM supply & demand in the current (2024/25) and the upcoming (2025/26) marketing year.

- As of late June, EU 2025 yield forecasts for soy, maize and rapeseed exceed above the 5-year average, supported by favourable weather in key areas, though regional disparities remain.
- EU Non-GM soy supply is likely to decline in 2025/26 as domestic (EU) output & Brazil's supply decrease; higher imports from Ukraine & India is expected to ease the shortfall.
- EU Non-GM maize supply is well covered until October 2025, backed by strong US imports, steady Ukraine flow & rising Brazilian volumes from August.
- The EU Non-GM rapeseed market stayed tight* in early summer 2025, but a double-digit harvest increase in July–August is expected to ease supply pressures.
- Trade policy, weather, and geopolitics — including U.S.-China relations and conflicts — drive price swings and impact the EU Non-GM soy, maize, and rapeseed market outlook.



Facts and figures regarding soy come from the Donau Soja Market Report. The report is published monthly and provides information on the soy industry with a special focus on the European Non-GM market. The Donau Soja Market Report includes news on market developments and forecasts as well as price, supply and demand data.

NON-GMO SOY

Highlights

- EU-27 Non-GM soy area is forecast to fall by 8% to around 1.1 million ha in 2025, following a record 2024 season.
- EU-27 Non-GM soy output is projected to decline by 6.1% year-on-year to 2.8 million t, according to DG AGRI's forecast.
- Most EU soy crops entered summer in good shape, supported by timely sowing and favourable early-season weather.
- In June, EU Non-GM soybean prices hovered around 410 EUR/t, continuing a downward trend driven by weak global GM soy prices and oversupply.
- Brazil's 2024/25 Non-GM soy harvest is projected at just 1.5 million t, down from 2.4 million t in the previous season, partly due to seed shortages.
- The EU may look to increase Non-GM soy import from Ukraine and India in 2025/26 to help offset reduced Brazilian supply.

Crop forecast

In the EU-27, only Non-GM soy is legally cultivated. Following a record-high area and output last season, the bloc's total soy area is expected to decline in 2025. Donau Soja forecasts an 8% drop in EU soy area to around 1.1 million ha.

The reduction in 2025 soy area is largely due to low yields and poor crop quality in 2024, which discouraged some EU farmers from planting soy again. Additionally, seed shortages during this year's planting season created further challenges, particularly in Italy and the Balkans.

This season, EU soy sowing was largely completed within the optimal April–May window under generally favourable conditions. June weather also supported early crop development. However, soil moisture deficits may limit yield potential in some regions, notably Hungary and Northern Croatia.

Overall, the average soy yield forecast for the EU-27 is 2.85 t/ha for the 2025 harvest, up 7% vs the 2020–2024 average, according to DG AGRI. But total EU soy production is projected to fall by 6.1% year-on-year to 2.8 million t due to reduced area (Figure 1).

* **Tight market situation** means that supply is limited relative to demand, leading to potential upward pressure on prices or difficulty securing enough products.

Figure 1 Non-GM soy output development in the EU-27 (million t)



*forecast

Source: DG AGRI

Price developments

In June, EU Non-GM soybean prices moved to around 410 EUR/t. Over the past year, EU Non-GM soybean prices have followed a clear downward trend, driven mainly by falling global GM soy prices and abundant global (GM) supply.

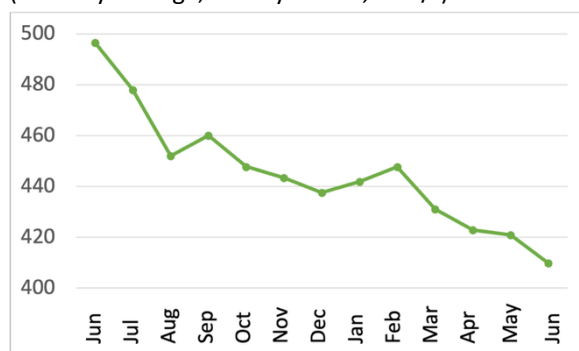
High-Protein (HP) Non-GM soymeal was offered at 460–470 EUR/t in Northern Germany in June, slightly higher than in May. Premiums over conventional soymeal stabilised in the 100–140 EUR/t range during the first half of 2025.

EU Non-GM soy prices remained closely tied to global GM market trends. In recent months, several key developments shaped market dynamics in the global (GM) soy market:

- **Trade policy:** A temporary U.S. – China tariff truce in May (cutting duties from 125% to 10%) raised hopes for stronger U.S. soybean exports to China.
- **Brazilian supply:** Brazil, the world's leading soy producer and exporter, completed harvesting a record 169 million t crop by mid-May (+9.4% year-on-year change), boosting global supply and putting downward pressure on prices.
- **U.S. crop progress:** Planting advanced well in June, with favourable weather supporting machinery operations in major states, though sown area is projected 4% lower compared to the previous season.

Looking ahead, markets will closely monitor Chinese demand, U.S.–China trade relations, U.S. weather during pollination, and ongoing geopolitical tensions.

Figure 2 Non-GM soybean price in the EU over the last year (monthly average, nearby month, EUR/t)*



* estimation based on prices in North Italy & South Germany

Source: Donau Soja

Non-GM supply & demand

Non-GM soy supply in the EU is expected to decline in 2025, driven by lower domestic production (see above) and reduced imports of Non-GM raw materials from Brazil.

Brazil remains a key global supplier of Non-GM soy products—beans, HP meal, and SPC (Soy Protein Concentrate)—for the EU (see Box 1 for details). According to ProTerra Foundation's latest mid-June Outlook, Brazil's 2024/25 Non-GM harvest is projected to fall to a historic low of 1.5 million t, down from 2.4 million t the previous season. This sharp drop is largely due to certified seed shortages and delayed procurement cycles.

In 2025/26, the EU may partially offset the decline in Brazilian Non-GM shipments by increasing imports from other origins. Supply from Ukraine and India is expected to play a key role. In the medium-term, the EU will need to strengthen domestic soy production and secure Non-GM imports from both Brazil and Ukraine to ensure stable supply.

Box 1 BASIC INFO ON NON-GM SOY IN THE EU

Only Non-GM soy varieties are permitted for cultivation in the EU. As a result, 100% of the soy harvested within the EU is Non-GM. However, the EU remains heavily dependent on soybean and soymeal imports, which exceed 30 million t annually*. According to USDA (U.S. Department of Agriculture) estimates, only about 10% of this volume is covered by Non-GM products. The origin of Non-GM soy import is mainly Brazil & Ukraine. Smaller & periodical shipments also come from India, Canada, Serbia and West-African countries (e.g.: Nigeria & Togo).

*calculated in soybean equivalent

NON-GMO MAIZE

Highlights

- EU Non-GM maize supply secure until the new harvest in October 2025, backed by US, UA and Brazil import.
- Over 99% of maize cultivation is Non-GM in the EU; GM maize production is limited to Spain and Portugal.
- EU maize area is predicted to decline by 1.3% to 8.7 million ha in 2025, as farmers favour winter crops.
- EU maize output to rise 8.4% to 64.6 million t in 2025, a 4-year high on gains in Romania and Bulgaria.
- Maize prices fell to 190–195 EUR/t by late June, under pressure from ample supply and a stronger euro.
- Non-GM maize is normally traded at a similar price to its GM counterpart.

Crop forecast

In 2025, maize sowing in the EU progressed largely on schedule and was completed by mid-May amid favourable weather conditions. Most regions reported good early crop development despite some local delays caused by wet spring conditions.

Farmers Cut Maize Area in Favour of Wheat

According to the latest DG AGRI forecast published in June, the EU maize area could fall by 1.3% to 8.7 million ha in 2025. Grain trade association COCERAL expects a larger drop of 6.2%, to 8.3 million ha, in its June forecast. The decline in EU maize area is expected mainly due to two key factors:

- Farmers moving away from spring crops like maize due to repeated heatwaves and drought risks, favouring more resilient winter grains, such as wheat or rapeseed.
- Better sowing conditions for winter cereals in autumn 2024 than the year before, leading to increased winter wheat and barley area, and a slight reduction in land available for spring/summer crops like maize and soy.

Over 99% of maize cultivation in the EU is Non-GM, with GM varieties grown only in Spain and marginal volumes in Portugal (see Box 2 on the next page).

Promising Start, Weather Risks Ahead

The June edition of DG AGRI's crop monitor (MARS report) points to generally positive yield expectations for EU maize in 2025, based on weather conditions observed up to mid-June, despite regional differences.

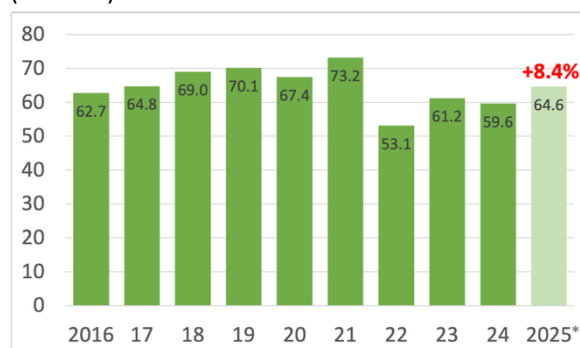
Early vegetative growth was favourable in Romania, Bulgaria, and parts of Italy and Hungary, supported by warm June weather. However, soil moisture deficits in central France, western Poland, Slovenia, and Hungary are raising concerns. Yield results will largely depend on rainfall during the pollination and grain-filling phases in the summer months. Meteorologists expect warm and dry weather in Central Europe in the first half of July. This could damage the corn crops in this region.

2025 EU Maize Output Set for 4-Year High

In 2025, despite reduced planted area, EU maize output is expected to rise by 8.4% (+5.1 million t) to a 4-year high of 64.6 million t (Figure 3), thanks to improved yields compared to last year's drought-hit season.

This year's output increase is mainly driven by stronger yields in key Southeast European producers — especially Romania (+ 4.0 million t) and Bulgaria (+ 1.4 million t) — after severe losses last season in this region. These gains could be partly offset by declines in France (- 1.4 million t), the EU's top maize producer, and Poland (- 1.0 million t), according to the June DG AGRI forecast.

Figure 3 Maize output development in EU-27 (million t)



* forecast

Source: DG AGRI

Price developments

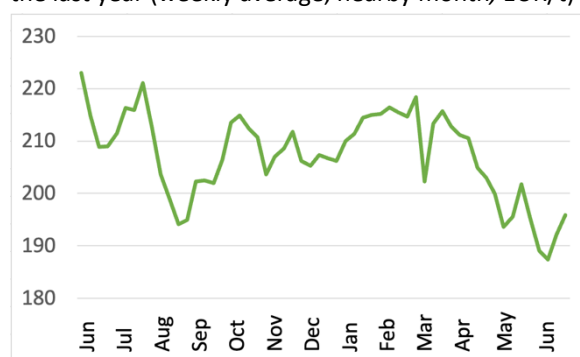
EU Non-GM maize prices have declined modestly over the past three months. At the end of June, Euronext futures for August delivery stood at 190–195 EUR/t, down from 213 EUR/t in late March (Figure 4). Prices fell in early June but recovered by month-end, returning to late May levels. Euronext, Europe's main maize exchange, remains the key price reference.

Maize Prices Fall Amid Strong Global Supply

The price drop reflects expectations of strong global maize supplies. Excellent growing conditions in the US, Brazil, and Argentina support good harvest prospects. In addition, a stronger euro (1.17 USD in early June) has made maize imports cheaper for European buyers, helping to keep prices in check. Meanwhile, wheat prices fell further in June due to strong northern hemisphere harvest prospects, which tends to weigh (put downward pressure) on maize prices because of their market link.

At the physical level, FOB* prices for German and French corn on the Upper Rhine stayed steady at 202 EUR/t between May and June. However, if weather worsens wheat yields, maize prices may rise given their close market relationship.

Figure 4 Maize price on Euronext Paris (MATIF) over the last year (weekly average, nearby month, EUR/t)



Source: MATIF

Non-GM supply & demand

Until the new EU maize harvest begins in October, the bloc's Non-GM maize supply is well secured to meet the needs of Non-GM feeding programs. Supply is supported by large US imports, ongoing deliveries from Ukraine, and increasing volumes expected from Brazil in August.

A record EU maize harvest of 64.6 million t is forecast for 2025/26, up 5 million t year-on-year and is expected to cover Non-GM demand. However, logistics remain a challenge, as stocks are often located far from end users. A smaller Ukrainian harvest in 2025 may also limit future supply.

Box 2 BASIC INFO ON NON-GM MAIZE IN EU MARKET

The lion's share of maize and maize products in the EU market is Non-GM. Non-GM maize is available in large quantities and normally has no higher price than GM maize. However, there are periods when GM maize has a discount (5-40 USD/t) over Non-GM maize in regions with large maize imports from Brazil (such as the Netherlands).

In domestic maize production, GM maize is limited to less than 1% of the total EU maize output. GM maize is the only GM crop which is commercially grown in the EU. Spain and Portugal are the only EU members that have adopted GM varieties in maize production. In 2024, the GM maize area in Spain occupied 69,400 ha, 25% of the total Spanish maize area. GM maize grown in Spain represents 99% of the EU's total GM maize area, and the remaining 1% (931 ha) is produced in Portugal. This GM maize is primarily used as feed locally in Spain & Portugal.

The EU relies on maize imports. Domestic maize production covered around 75–80% of the total EU maize consumption when calculated for the 5 years average of 2020-2024. The yearly maize import of the EU-27 has averaged 18.7 million t and ranged from 14.1 to 23.8 million t over the last 5 years (2020-2024).

USDA estimates that roughly 80% of the EU maize import is Non-GM. The main source of import is Ukraine, responsible for around 55-60% of the total EU maize import (5-year avg. of 2020-2024). Officially, there is no approved GM maize variety for cultivation in Ukraine but there is a limited amount – around 1% – of illegal GM maize production in Ukraine, according to the USDA estimations.

Brazil also plays an important role in supplying maize to the EU, accounting for 20-25% of EU imports (5-year avg. of 2020-2024). The share of GM maize production covers a much higher proportion, around 95% of the total Brazilian maize cultivation (estimation of USDA). This means that the majority of maize from Brazil is GM.

* FOB (Free on Board): a trade term indicating that the seller delivers the goods when they are loaded onto the buyer's chosen mode of transport at the agreed location. From that point onward, the buyer bears all risks and costs associated with transport.

NON-GMO RAPE

Highlights

- EU Non-GM rapeseed and meal supply remains tight before the new harvest but should ease after July/August.
- EU rapeseed area for the 2025 harvest is estimated at 6.0 million ha, +4.5% vs previous season, all Non-GM by law.
- Rapeseed crop conditions are generally good across most of the EU as of late June, with some regional differences.
- EU rapeseed output is forecast to rebound to around 18.9 million t in 2025, up 13.4% vs 2024.
- Non-GM rapeseed prices on Euronext averaged around 483 EUR/t in late June, down 5–10% from April, partly driven by improved crop prospects in the EU & stronger EUR vs USD.

Crop forecast

Only Non-GM rapeseed varieties are cultivated in the EU by law (Box 3 on the next page). As a result, all EU rapeseed production figures refer to Non-GM quality. Rapeseed is mainly grown as a winter crop in Europe—sown in early autumn and harvested the following summer, typically starting in early July in southern regions.

Strong EU Rapeseed Outlook for 2025

For the 2025 harvest, the EU rapeseed area is estimated at 6.0 million ha, up 4.5% from last season and 4.7% above the 5-year average (DG AGRI, June). This expansion was mainly driven by attractive rapeseed prices during the sowing period in autumn 2024.

EU rapeseed output is projected to rebound to 18.9 million t in 2025, a 13.4% rise (+2.2 million t) compared to the drought-affected 2024 season (Figure 5). Forecast agencies Strategie Grains and Oil World expect a similar 12–13% increase.

France and Germany, the two largest producers, are forecast to increase output by 468,000 t (+12.1%) and 268,000 t (+7.4%), respectively.

Romania is expected to see the strongest recovery, with an increase of 882,000 t (+75.8%) as yields improve from last year's poor performance.

Weather Drives Diverging EU Rapeseed Yields

Rapeseed was mostly sown under favourable conditions in autumn 2024, with mild temperatures and adequate moisture supporting good crop establishment.

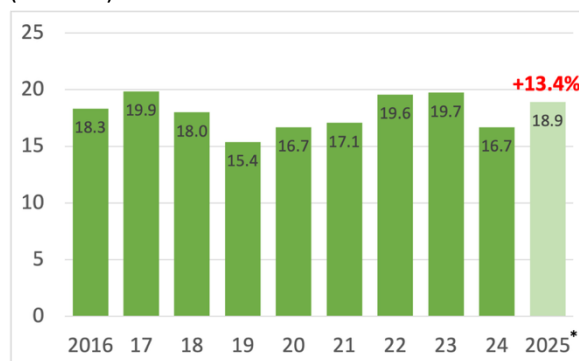
The growing season—which spans from autumn to early summer—has seen mixed weather across the EU:

- Southern and Eastern regions (e.g., Spain, Romania, Bulgaria, Baltics) benefited from timely rainfall and are expecting above-average yields.
- Western Belgium, Central France, Eastern Germany, Poland, and Hungary experienced persistent dryness, putting crops under stress.
- Northern Italy, by contrast, faced excessive rainfall, which is likely to reduce yields.

Average EU rapeseed yield is forecast at 3.18 t/ha, which is higher than both the 2024 level of 2.93 t/ha and the 5-year average of 3.16 t/ha. In the main producing countries, yields are expected to remain close to the 5-year average. France may see a 1% increase, while Germany and Poland could experience slight declines of 2% and 4%, respectively. Romania, Lithuania, Latvia, and Denmark are projected to achieve above-average yields, with increases ranging from 7% to 12%.

Rainfall during the critical grain filling and ripening stages, typically from late May to July, will play a key role in determining final outcomes.

Figure 5 Rapeseed output development in EU-27 (million t)



*forecast

Source: DG AGRI

Price developments

Non-GM rapeseed prices on Euronext averaged 483 EUR/t in the last week of June, about 5–10% lower than in April (Figure 6).

Prices stayed highly volatile between April and June. In June, the following key factors drove price movements:

- Rising oil prices due to Middle East tensions, which supported rapeseed
- A stronger euro making imports cheaper
- Biodiesel policies in Brazil and the US boosting global vegetable oil demand, including rape oil
- Improved EU crop prospects putting downward pressure on prices

Although global rapeseed production is expected to rise slightly in the 2025/26 season, tighter supplies are likely due to lower output and declining stocks in major exporters—Ukraine, Australia, and Canada. This is expected to push prices higher. While EU production is rebounding, import availability remains limited, particularly from Ukraine.

At the end of June, physical prices were around 470 EUR/t in western Germany. Ukrainian and Australian offers stood near 450 EUR/t FOB, while Canadian canola was less competitive at 490 EUR/t.

Figure 6 Rapeseed price on Euronext Paris (MATIF) over the last year (weekly avg., nearby month, EUR/t)



Source: MATIF

Non-GM supply & demand

The supply of Non-GM rapeseed and meal remained tight in early summer in the EU but is expected to ease with the July–August 2025 harvest. EU rapeseed output in 2025 is forecast to rise by double digits. Rapeseed crushing is projected to increase by 1–2 million t, boosting Non-GM rapeseed meal availability. However, Non-GM rapeseed imports from Ukraine are likely to fall sharply due to a smaller harvest and possible export restrictions.

Overall, the Non-GM rapeseed market in 2025/26 should be more balanced than the previous season, with moderate downward price pressure, assuming normal weather and no major trade disruptions.

Box 3 BASIC INFO ON NON-GM RAPESEED IN THE EU MARKET

Similarly to the maize market, the overwhelming amount of rapeseed and rape meal traded within the EU is Non-GM. In the EU Non-GM is the standard quality both in futures contracts and the physical market of rapeseed products. Normally there is no higher price of Non-GM rapeseed versus its GM counterpart. But there are periods when GM rapeseed is traded at a 0–25 EUR/t discount, mostly when a larger import of Australian and Canadian GM import is needed to feed crushing plants in the EU.

In the EU-27, only Non-GM rapeseed is produced. But import is needed to supply the demand within the 27-nation bloc. Less than 25% of the EU rapeseed import is GM according to a rough estimate of USDA (there is no official data here). The total EU-27 rapeseed import ranged between 5.0 and 6.5 million t over the last 5 years (2020–2024). DG AGRI forecasts that the total EU-27 rapeseed import reaches 5.8 million t in the current 2024/25 marketing season.

The rapeseed import in the EU-27 comes from countries with varying adoption rates of GM rapeseed. Ukraine and Australia are the most important rapeseed exporters to the EU, accounting for 39% and 39% of the total EU import respectively (5-year average of 2020–2024). Both nations produce some GM crops on their rapeseed fields. However, even if there is no legitimate commercial production of GM crops in Ukraine, USDA reported that around 10–12% of the Ukrainian rapeseed export is GM. In Australia, the share of GM rapeseed (canola) was 46% in 2024 according to the [report](#) published by the Australian Government.

Canada also plays an important role in supplying rapeseed to the EU with a share of 15% in the total rapeseed import of the EU (5-year average of 2020–2024). In 2024, the share of GM varieties in the total rapeseed (canola) area in Canada accounted for 95%, according to the [estimate of USDA](#).

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