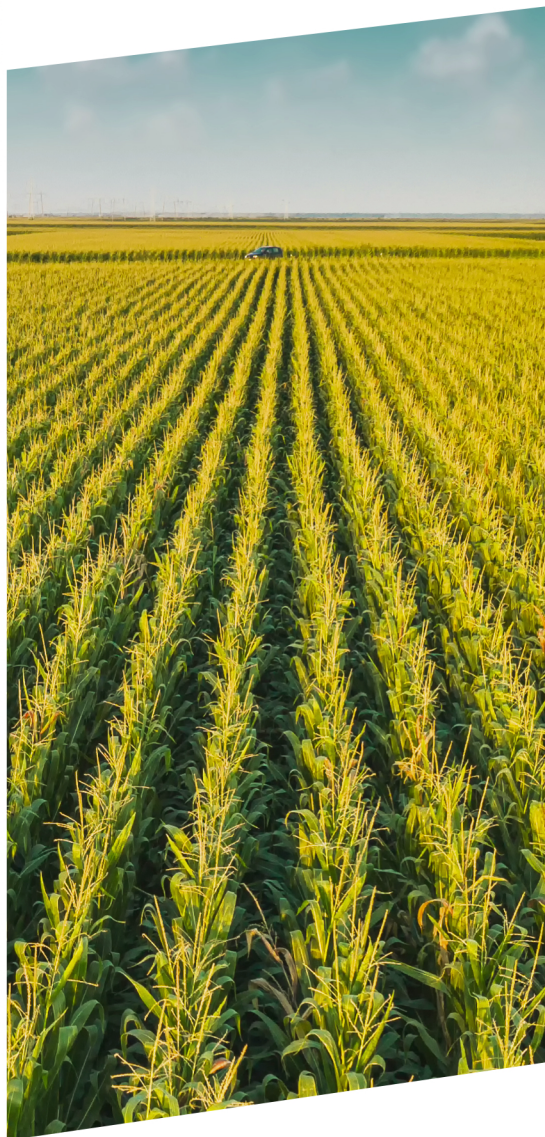


NON-GMO SOY NON-GMO MAIZE NON-GMO RAPESEED



HIGHLIGHTS

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

- Non-GM supply of soy, maize and rapeseed is expected to remain broadly stable, although import structures for all three crops are set to change significantly in 2025/26.
- Ukrainian export policy changes and lower Indian output are reshaping EU Non-GM soy imports in 2025/26, with alternative suppliers partly offsetting tighter supply.
- The record 2025/26 global crop prospects for soy, maize, and rapeseed continue to weigh on global and EU Non-GM prices, with South American harvests and Chinese demand in focus.
- DG AGRI projects growth in EU-27 soy production over the next decade, with maize and rapeseed output expected to hold at current levels.
- Only Non-GM varieties are grown in the EU-27, except for one GM maize variety, which is cultivated on limited areas in Spain and Portugal, accounting for around 1% of EU maize output.



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

- Domestic Non-GM soybean supply in the EU-27 is expected to remain stable in 2025/26, while the structure of Non-GM soy imports is set to change.
- EU-27 soy output in 2025 is estimated at 2.9–3.0 million t, about 4% below the 2024 record. All of it is Non-GM.
- Brazil remains a smaller but relevant partner in the EU's Non-GM supply, while Indian soymeal availability tightens.
- COCERAL projects higher EU-27 soy area and output in 2026, though the estimates remain preliminary, with the sowing campaign still several months away.
- EU Non-GM soybean prices dropped below EUR 400/t by mid-January, reaching a five-year low amid ample global soy supply.
- EU medium-term prospects for soy remain positive, supported by policy backing for protein crops and rising plant-based protein demand.

Crop forecast

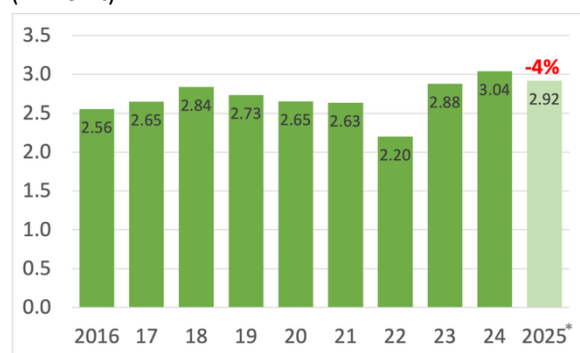
EU-27 soy output in 2025 remained relatively strong despite a 6–8% contraction in planted area, according to estimates from Donau Soja and DG AGRI. Total EU-27 production reached around 2.9–3.0 million t, only about 4% below 2024 record levels, with crop quality reported as good to very good. As only Non-GM soy is legally cultivated in the EU-27 (see Box 1 on the next page), all production figures refer exclusively to Non-GM output.

In its first forecast published in December, grain trade association COCERAL projects the EU-27 soy area to increase by 4.5% to around 1.15 million ha in 2026, lifting production by 5.3% to approximately 3.18 million t. This remains a preliminary estimate, as the sowing campaign – expected to begin in the second half of April – is still several months away.

Positive Medium-Term Outlook for Soy

Despite short-term market volatility, the medium- to long-term outlook for soybeans and pulses in Europe remains positive. This is mainly underpinned by EU policies supporting protein crop production and steadily growing demand for plant-based proteins, as highlighted in DG AGRI's [Mid-Term Outlook](#) published in late 2025.

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



*forecast

Source: DG AGRI

Price developments

In mid-January, Non-GM soybean prices at the Bologna Exchange—a key benchmark for the EU—were quoted at EUR 390–400/t, slightly below levels seen three months earlier (Figure 2). While prices recorded a temporary rebound in December, the broader trend since May 2024 has been downward, reflecting weaker global GM soy prices and ample global soy supply.

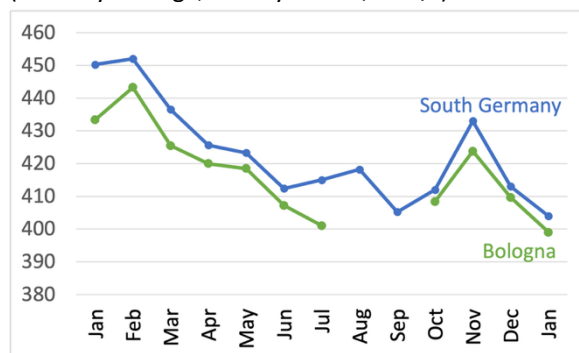
High-protein Non-GM soymeal prices in Northern Germany stood at EUR 445–450/t in mid-January, broadly unchanged from mid-October levels, although prices temporarily increased in December, in line with soybean prices.

Globally, soybean prices have remained under pressure in early 2026, weighed down by abundant supply and high carry-over stocks. Strong production prospects in South America – particularly Brazil – together with solid recent U.S. output have limited price recovery despite steady demand. Key drivers:

- Ample global supply: USDA estimates 2025/26 global soybean production near record levels, supported by another large Brazilian crop and comfortable stocks.
- Trade uncertainty: Uncertainty around U.S. – China trade relations and China’s diversified sourcing strategy continues to reduce the chances of stronger price increases.

In the coming weeks, market attention will focus on South American harvest results, U.S. planting intentions, and Chinese import demand. With supply expected to remain ample, prices are unlikely to rise significantly unless severe weather problems occur.

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



*until mid-January, prices are estimations based on the Bologna Exchange and price indications; Source: Donau Soja

Non-GM supply & demand

The volume of domestically produced Non-GM soy in the EU is expected to remain broadly stable in 2025/26, supported by steady output in Western Europe, particularly in Italy, Austria, and Germany. However, the structure of Non-GM imports is set to change in the current marketing season:

- **Ukrainian (UA)** Non-GM soybean exports to the EU are expected to decline after the late-2025 export tax, with trade moving toward Non-GM soymeal.
- **Brazil’s** role in the Non-GM supply chain is likely to remain smaller than in earlier years but still important, as its Non-GM segment is sufficient to meet current certified export demand to Europe.
- **Indian** Non-GM soymeal availability in 2025/26 is expected to fall sharply due to lower domestic production in late 2025.
- **Other origins**, including Canada, West Africa, and Argentina, are expected to partly offset these changes through higher Non-GM soy shipments.

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

Only Non-GM soybean varieties are permitted for cultivation in the EU member states. 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 (calculated in soybean equivalent). 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).

NON-GMO MAIZE

Highlights

- Non-GM availability in the EU is adequate but tightening as UA supplies fall and GM-origin imports rise.
- Over 99% of EU maize output is Non-GM, with GM maize grown only in Spain and Portugal.
- EU maize output fell again in 2025 to 57.8 million t (-2.4% y/y; -8% vs 5-year avg.) due to lower area and weather losses in South-eastern Europe.
- In 2026, the EU maize area remains low and is set to decline further, with plantings projected at 7.9 million ha (-3.6% y/y) as farmers shift to oilseeds.
- EU Non-GM maize prices have remained broadly stable over the recent 3 months, with Euronext futures around EUR 190/t in mid-January.

Crop forecast

Maize sowing in the EU typically begins in April, several weeks earlier than soybean planting, with harvest usually taking place in October and November. More than 99% of maize cultivated in the EU is Non-GM; GM maize is grown only in Spain and Portugal (see Box 2).

Maize Output Down In 2025

EU maize area remained at a relatively low level in 2025, mainly due to weaker profitability versus oilseeds and protein crops, repeated weather-related yield losses and rising climate risk in marginal regions.

EU grain maize output is estimated at 57.8 million t in 2025, down 2.4% year-on-year and 8% below the five-year average (Figure 3), according to the European Commission's mid-December estimate.

The decline in output reflects both reduced planted area and weather-related yield losses in 2025. Repeated heatwaves in South-eastern Europe caused significant yield reductions in Hungary, Romania, Bulgaria and Greece.

In addition, above-average autumn rainfall in 2025 delayed harvesting in several regions, while isolated fungal infestations in maize cobs raised concerns over elevated mycotoxin levels.

EU Maize Area Continues to Decline in 2026

Although the sowing campaign is still several months away, early forecasts point to a further contraction in maize area. According to COCERAL, EU maize plantings are projected to fall to around 7.89 million ha, down 3.6% year-on-year, as farmers increasingly shift to sunflowers and soybeans following poor recent maize yields, particularly in France and the Balkans. Maize output in 2026 is tentatively forecast at 58.8 million t, slightly above the drought-affected 2025 crop.

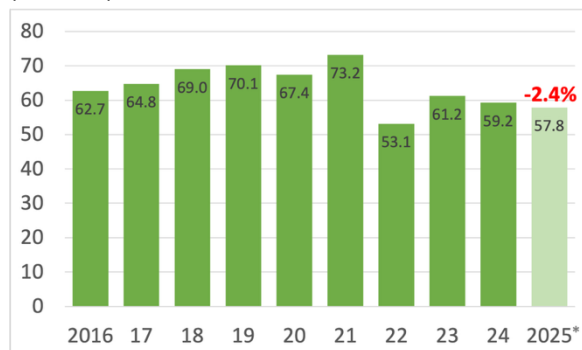
Long-term Outlook

In its [Mid-Term Outlook](#), the DG AGRI projects that EU maize output remain broadly stable at around 61 million t over the next decade, though output is likely to show greater year-to-year volatility rather than sustained growth toward 2035.

Maize area is also projected to remain stable, despite of cereals in general in the EU is expected to decline slightly toward 2035. This trend of cereals is driven by competition from oilseeds and protein crops, weakening feed demand, less supportive biofuel incentives after 2028, and persistently high and volatile input costs.

Maize yields are expected to increase modestly due to technological and management improvements, but growth will be slower than in the past and increasingly constrained by climate change, water scarcity, and heat stress.

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



* forecast

Source: DG AGRI

Price developments

EU Non-GM maize prices have remained largely stable over the past three months (Oct to mid-Jan), with Euronext maize futures hovering around EUR 190/t in mid-January, only slightly above the early-October low (Figure 4).

Ample global supply continues to limit price gains in the EU, despite reduced domestic maize output in the October 2025 harvest. While no significant short-term volatility is expected, prices could move higher if weather conditions in South America – a key maize producing and exporting region currently in the planting phase – deteriorate sharply and threaten production.

In line with futures, cash market prices also showed only minor fluctuations.

- In North-western Germany, compound feed manufacturers paid an average of 215 EUR/t over the month.
- In France, prices in the Upper Rhine region averaged 200 EUR/t, while
- values in Southern Spain and Northern Italy were around 230 EUR/t.
- FOB¹ prices at Ukrainian export ports remained broadly stable at approximately 190 EUR/t.

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



*until 12 January

Source: MATIF

Non-GM supply & demand

Despite the smaller EU maize harvest, Non-GM availability remains adequate, supported by solid output in France, Germany and Poland in late 2025.

UA shipments remain sharply lower year-on-year due to Black Sea infrastructure attacks and delayed harvesting. Meanwhile, imports are increasingly sourced from Brazil and the United States, where maize is predominantly GM.

As a result, Non-GM availability is expected to tighten gradually, though no major supply bottlenecks are anticipated in the near-term.

Box 2 BASIC INFO ON NON-GM MAIZE IN THE 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 that 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-year 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 (five-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 (five-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.

¹FOB (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 supply remains adequate, supported by the large 2025 harvest, though availability is tighter partly due to slower farmer selling.
- EU rapeseed area for the 2026 harvest is estimated at a 16-year high of around 6.5 million ha (+4 – 7% y/y).
- EU rapeseed output is set to rise modestly in 2026 to 21-22 million t as yields are likely to normalise after last season's exceptional performance.
- Rapeseed cultivation in the EU is limited to Non-GM varieties, ensuring Non-GM remains the market standard.
- Non-GM rapeseed prices recovered to around 468 EUR/t by mid-January on Euronext, after a December dip driven by weaker global soybean markets.

Crop forecast

Rapeseed is mainly grown as a winter crop in Europe, typically sown in early autumn and harvested the following summer. Only Non-GM varieties are permitted for cultivation under EU law (see Box 3).

EU rapeseed plantings at 16-year high

EU rapeseed area is expected to increase to around 6.5 million ha for the 2026 harvest, up 7% year-on-year (Figure 5), according to recent estimates from global intelligence service Expana. Based on Expana's data, this would place EU rapeseed area 11% above the five-year average and mark the largest planted area in 16 years.

Despite this robust expansion in area, EU rapeseed output is expected to increase only marginally. COCERAL estimates output at around 20.9 million t, as lower yields are anticipated following the exceptionally high yields recorded last season. Argus Media is more optimistic, forecasting an EU rapeseed harvest of 21.8 million t in 2026, compared with its estimate of 20.8 million t for the 2025 harvest.

Winter rapeseed establishment is broadly positive

Sowing progressed well across most EU rapeseed-producing regions, with generally favourable establishment conditions for winter rapeseed, according to the EU crop monitoring service MARS in its [late-November report](#). Weather conditions in December remained broadly favourable and are not expected to have caused damage, leaving prospects for the 2026 harvest positive.

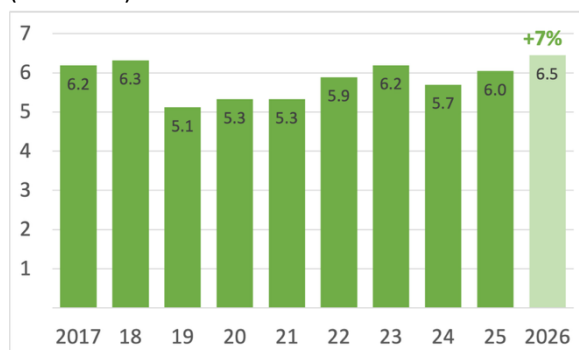
Crop development has been satisfactory in Northern and Western Europe, particularly in France, Germany and Poland, where adequate rainfall and mild temperatures supported early growth, while a late-November cold spell helped crops prepare for winter despite earlier delays in plant hardening.

Conditions were more mixed in South-eastern Europe, with uneven crop development in Romania following dry soils and subsequent heavy rainfall and slightly higher sowings in Bulgaria.

Stable EU Rapeseed Outlook To 2035

According to DG AGRI's [Mid-Term Outlook](#), EU rapeseed production is projected to remain broadly stable at around 18.4 million t by 2035, close to the 2023–2025 average, with yields expected to remain largely unchanged. Production prospects face downside risks from more frequent extreme weather events, reduced availability of plant-protection products and a gradual expansion into lower-yielding areas; however, these pressures are assumed to be largely offset by technological progress, the adoption of more sustainable farming practices and the introduction of new plant-protection solutions later in the outlook period.

Figure 5 Rapeseed area development in EU-27 (million ha)



Source: DG AGRI values and Expana forecast for 2026

Price developments

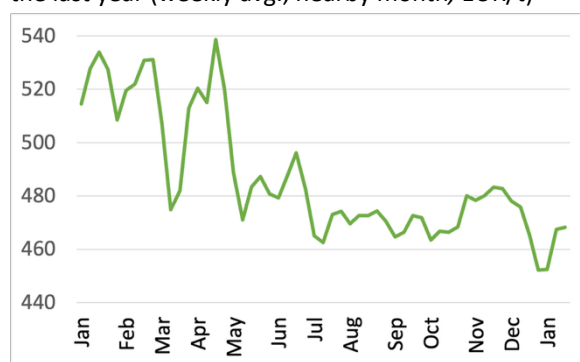
Euronext Non-GM rapeseed prices recovered to 468 EUR/t by mid-January, after a temporary 30 EUR/t (-5–7%) fall in December driven by weaker global soybean prices (Figure 6).

EU rapeseed prices continue to follow global oilseed trends, with US soybean prices setting market direction, while ample supplies from Canada and Australia and weaker vegetable oil markets weigh on prices. Despite record harvests lifting global production to a new high in 2025/26, global trade has contracted sharply due to trade disruptions and political intervention, notably the collapse of Canadian exports to China and reduced Ukrainian shipments.

On the cash market, a similar price decline and subsequent recovery was observed in December.

- In the Upper Rhine region, oil mills were paying around 465 EUR/t for January deliveries at the end of the month,
- while UA rapeseed prices remained broadly stable at around 476 EUR/t, supported by strong domestic crushing demand.
- Rapeseed meal prices in the Upper Rhine ended December at around 195 EUR/t, broadly unchanged from late November, underpinned by firm agricultural demand.

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



*until 12 January

Source: MATIF

Non-GM supply & demand

The large EU rapeseed harvest in summer 2025 (entirely Non-GM) ensures adequate supply, though market availability has been tighter due to slower farmer selling. EU imports declined sharply in early 2025/26, mainly because UA deliveries fell after export duties were introduced.

Meanwhile, strong harvests in Canada and Australia are boosting global availability. As China restricts imports from Canada, more mostly GM Canadian rapeseed is flowing to the EU and needs to be strictly separated. Overall, no shortages of Non-GM rapeseed or rapemeal are expected, although trade flows and sourcing patterns have shifted.

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 (five-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 (five-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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