MARKET REPORT
Edition 12/Oct2026

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



European Non-GMO Industry Association

DONAU SOJA

ProTerra™

HIGHLIGHTS

The following points summarise the major trends and recent developments that affect the EU Non-GM supply and demand in the current (2026/27) marketing season.

- EU Non-GM supplies are expected to tighten across the soy, maize and rapeseed markets in 2026/27, mainly due to lower domestic production and constraints on Non-GM imports.
- EU soy and maize production is forecast to fall sharply in 2026, by around 20% year on year, while rapeseed output is expected to decline by 4%, despite a record harvested area.
- EU Non-GM soy and maize prices rose by 10-20% over the past three months, driven partly by worsening harvest prospects in the EU and uncertainty surrounding Ukrainian exports.
- Brazil's role as a major Non-GM soy supplier to Europe could strengthen again amid constrained Ukrainian exports and limited alternative supplies.
- All EU crop production is Non-GM, with the exception of GM maize grown in Spain and Portugal, which accounts for less than 1% of total 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

- The EU Non-GM soy supply is likely to tighten in the 2026/27 marketing season, partly due to the sharp decline in EU production.
- EU Non-GM soy production is forecast at 2.2-2.4 million tonnes in 2026, a massive drop after the very hot and dry summer.
- EU Non-GM soybean prices rose by 10-15% over the past three months, reaching 505 EUR/t at the Bologna Exchange in early October.
- Non-GM soy prices were driven upward by tight old-crop supplies, worsening EU harvest prospects, Ukrainian export disruptions and higher global soy prices.
- While all soy grown in the EU is Non-GM, the EU relies heavily on imports, most of which are GM.
- Brazil has a unique opportunity to expand its Non-GM soy exports to Europe, although stronger supply-chain cooperation and investment will be needed.

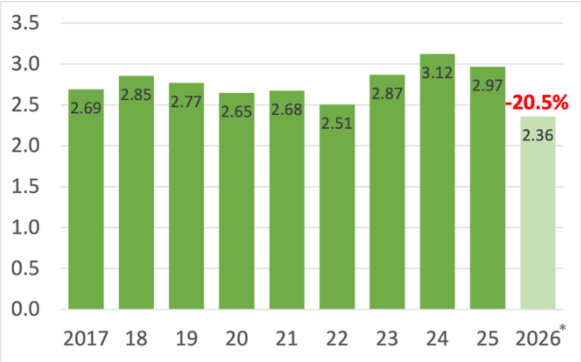
Crop forecast

All soy grown in the EU is Non-GM, meaning that all production forecasts below refer to Non-GM soybeans (Box 1). The EU soy harvest was mainly finished by late-October. The 2026 soy crop is expected to be among the poorest in the past two decades, following the hottest summer on record in Western Europe. Although the growing season started with relatively favourable yield prospects, intense heat and drought from late June onwards, particularly across western and central Europe, led to successive downward revisions.

According to JRC MARS, the EU crop-monitoring service, the average soy yield was forecast at just 2.26 t/ha in late September, 15% below the five-year average. The EU soy area is also estimated to have declined by around 5-6% in 2026.

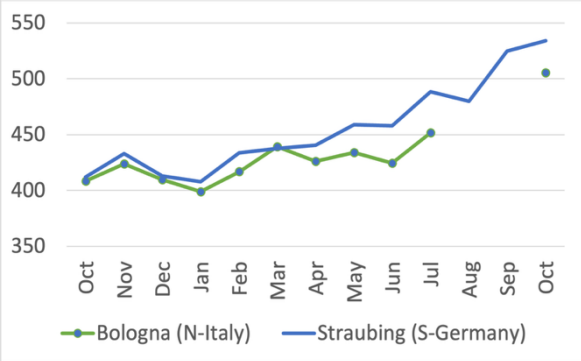
As a result, EU soy production is expected to fall by around 20% to 2.4 million tonnes (t) in 2026, according to Donau Soja's forecast (Figure 1). DG AGRI and Expana, a market intelligence firm, have similarly weak expectations. In their latest forecasts, published in late September, they estimated EU-27 soy output at 2.2 million t and 2.3 million t, respectively.

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



*forecast
Source: Donau Soja

Figure 2 Non-GM soybean prices over the last year (weekly avg., EUR/t, until early Oct)



Source: Donau Soja estimate based on data from the Bologna Exchange and the Deutscher Sojaförderring (Straubing).

Price developments

Non-GM soybean prices in the EU continued to rise over the past three months. At the Bologna Exchange, a key EU benchmark, prices reached 505 EUR/t in early October, around 10-15% higher than in early July (Figure 2). In southern Germany (Straubing), a major Non-GM soy-crushing region, prices reached 530-540 EUR/t by early October, up around 10% over the same period.

The Non-GM soymeal market was particularly tight in August and September, with limited availability for prompt delivery ahead of the new harvest. Northern Europe was especially affected by these shortages. In northern Germany, high-protein (HP) Non-GM soymeal was offered at around 670 EUR/t for delivery in early October.

Non-GM soymeal premiums (the price difference between Non-GM and GM products) also increased over the past few months.
In northern Germany, the premium for HP Non-GM soymeal exceeded 150 EUR/t in August, reaching its highest level since early 2025.

The price increases for Non-GM soy products were driven by higher global soybean prices and several factors that tightened Non-GM supplies in Europe. These included:

- Successive downward revisions to EU soybean production forecasts;
- Dwindling stocks from the previous harvest ahead of the new harvest;
- Logistical difficulties affecting Ukrainian exports, aggravated by Russian attacks on transport and port infrastructure.

Non-GM supply & demand

Non-GM soya availability in the EU is expected to tighten in the 2026/27 marketing year, mainly due to a sharp decline in domestic production. Two additional factors are likely to tighten supplies further. First, imports from Ukraine, one of the EU's main external suppliers of Non-GM soy products alongside Brazil, have become more uncertain. Ukrainian production is expected to decline, while Russian attacks on transport and port infrastructure continue to disrupt exports. Second, alternative suppliers face constraints, with fewer supplies of Non-GM soymeal available for export from India and West Africa facing production, logistical and regulatory challenges.

These developments could strengthen Brazil's position as a key supplier of Non-GM soy products to Europe. However, expanding supply would require investment in dedicated Non-GM production, processing and storage facilities, as well as reliable segregation and traceability systems. Closer cooperation between producers, exporters and European buyers will also be essential to ensure stable, long-term supply.

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

Only Non-GM soy varieties are permitted for cultivation in 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. Brazil and Ukraine are the main sources of Non-GM soy imports. Smaller and occasional shipments also come from India, Canada, Serbia and West-African countries (e.g.: Nigeria and Togo).

NON-GMO MAIZE

Highlights

- EU Non-GM maize supply is expected to remain tight in 2026/27, mainly due to the large decline in domestic output.
- The EU maize crop is forecast to fall sharply to around 48 million t in 2026, its lowest level in decades, following the severe summer heat and drought.
- France faces an exceptional maize crop decline, while Poland could become the EU's largest maize producer in 2026.
- By early October, Euronext maize prices had reached around 270 EUR/t, mainly reflecting the weaker EU crop outlook.
- More than 99% of EU maize production is Non-GM; GM maize is grown only in Spain and Portugal.

Crop forecast

By mid-October, the maize harvest was well advanced across many major producing regions. More than 99% of the EU maize area is Non-GM, while GM maize is grown only in Spain and Portugal (see Box 2). Therefore, maize produced elsewhere in the EU can be considered Non-GM.

EU maize harvest drops to decades-low level
EU-27 maize production is expected to fall sharply in 2026. According to DG AGRI's latest estimate, published in late September, output is forecast at 48.3 million t, down 19.8% year on year. This would be the lowest EU maize crop since at least 2000. The decline reflects both a historically low maize area and severe weather-related yield losses in several maize producer countries.

Other organisations expect a similar trend. COCERAL, a grain trade association, forecasts EU maize production at 48.6 million t, down 14.0% year on year. Expana is even more pessimistic and expects production of only 46.2 million t, down around 19%.

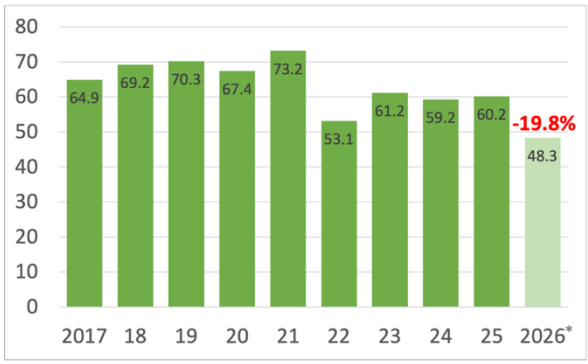
France hit hard, Poland moves to the top
France, traditionally one of the EU's largest maize producers, is facing an exceptional decline. In its mid-September estimate, the French Agriculture Ministry forecast grain-maize production at just 8.1 million t in 2026, down 42% from 2025 and potentially the lowest harvest since 1980. The decline reflects both a 21% drop in yield and a 26% reduction in the harvested grain-maize area.

Poland could become the EU's largest maize producer for the first time in 2026, with output estimated at around 8.7 million t.
By contrast, Hungary is expected to record one of the sharpest declines, according to DG AGRI's estimates. Hungarian maize output is forecast at just 2.0 million t, down about 48% year on year and roughly one-third of the level recorded three years ago.

Hot and dry summer cuts maize yields
In its late-September bulletin, JRC MARS estimated the average EU maize yield at 6.5 t/ha, 8% below the five-year average. This marked a sharp deterioration from the end of June, when yield prospects were still above average. Repeated heatwaves and widening rainfall deficits then led to month-by-month downward revisions.

The first major problems appeared in France and northern and central Italy. Damage then spread to other maize producer regions in the bloc. Heat and drought affected flowering, kernel formation and later grain filling. The overall pattern was similar to soybean, but maize damage became visible earlier because the first heatwaves coincided with its critical flowering stage.

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



* forecast
Source: DG AGRI

Price developments

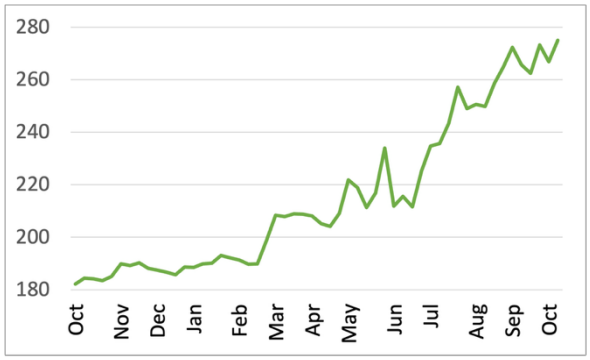
Euronext maize prices increased sharply over the past three months (Figure 4), mainly reflecting the substantial deterioration in the European crop outlook described above. Supply risks in the Black Sea region also supported prices, as Ukraine is traditionally the EU's largest external supplier of maize. A broader rally in global grain markets and a weaker euro against the US dollar provided additional support.

Maize futures on Euronext traded at around 270 EUR/t in early October, up 15-20% compared with three months earlier. Throughout September, prices remained above 260 EUR/t, their highest level since early 2023.

On the physical market, maize traded at around 286 EUR/t in north-western Germany, 260 EUR/t in southern Spain and 195 EUR/t in Bulgaria at the end of September. In Hungary, poor yields pushed producer prices up by around 30 EUR/t from old-crop levels to 240 EUR/t.

Further price developments will depend on Ukraine's ability to increase exports to the EU. The high price level in Central Europe makes it viable to shift maize transports to road and rail, given the ongoing risks to Black Sea shipping routes due to the war in Ukraine.

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



*until 9 Oct
Source: MATIF

Non-GM supply & demand

Non-GM maize supply in the EU is expected to remain tight throughout 2026/27, mainly due to the sharp decline in domestic production.

Maize imports are expected to increase strongly, but a large share of the additional volumes is likely to come from the US, where maize production is predominantly GM. This limits the relief for the Non-GM market. Ukrainian deliveries, which are particularly important for Non-GM supply, have increased despite ongoing logistical and security risks.

Demand is expected to remain relatively stable, as tight wheat availability limits substitution in feed rations, while feed demand remains firm.

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, GM maize is sometimes sold at a discount (5-40 USD/t) over Non-GM maize in regions with large maize imports from Brazil and the US (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 2025, the GM maize area in Spain occupied 70,000 ha, 22% 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% (647 ha) is produced in Portugal. This GM maize is primarily used as feed locally in Spain and 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 19.3 million t and ranged from 14.1 to 23.8 million t over the last 5 years (2021-2025).

USDA estimates that roughly 80% of the EU maize import is Non-GM. Ukraine is the main source of imports, responsible for around 55-60% of the total EU maize import (five-year avg. of 2021-2025). Officially, there is no approved GM maize variety for cultivation in Ukraine. Illicit production of GM maize is believed to be minimal, primarily due to limited access to smuggled seed that needs to be replenished annually (Source: USDA FAS report).

Brazil also plays an important role in supplying maize to the EU, accounting for 20% of EU imports (five-year avg. of 2021-2025). 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.

NON-GMO RAPE

Highlights

- Lower domestic production and imports point to tighter EU Non-GM rapeseed supplies in 2026/27.
- EU rapeseed production falls by 3.8% in 2026 despite record harvested area, with Poland and Germany recording the largest declines in absolute terms.
- Dry conditions hamper EU rapeseed sowing for the 2027 harvest, with planted area expected to decline.
- Euronext rapeseed prices were traded at around 550 EUR/t in late September, following gains in August and the first part of September.
- All EU-grown rapeseed continues to be Non-GM, while GM imports contribute to meeting domestic demand.

Crop forecast

The EU is one of the world's largest rapeseed producers, alongside Canada, accounting for around 20% of global output. Rapeseed oil is mainly used for biofuels and food, while rapeseed meal is an important protein source in animal feed.

Rapeseed is predominantly grown as a winter crop, typically sown in early autumn and harvested in mid-summer of the following year. The 2026 rapeseed harvest in the EU-27 was largely completed by August.

The 2026 growing season started under generally favourable conditions, but late spring frosts, persistent rainfall deficits and early summer heatwaves reduced yield potential in several producing regions. Unlike soybeans and maize, rapeseed production in the EU-27 has remained relatively stable in 2026 despite adverse weather conditions.

Only Non-GM rapeseed varieties can be cultivated in the EU-27 (Box 3); therefore, all figures below refer to Non-GM rapeseed.

Larger harvested area limits production decline
According to DG AGRI's late-September estimate, the EU rapeseed harvested area reached a record 6.4 million ha in 2026, up 5.3% year-on-year. The average EU rapeseed yield is estimated at 3.05 t/ha, 4.7% below the five-year average, reflecting adverse growing conditions in several producing regions.

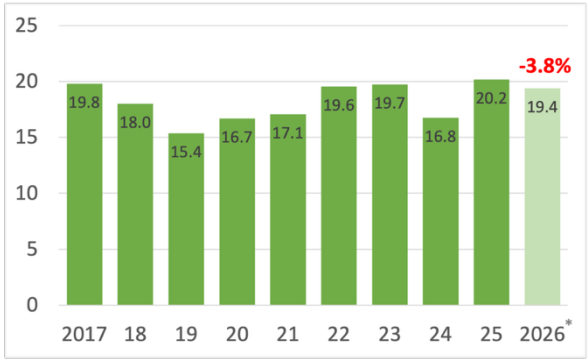
EU rapeseed output is estimated at 19.4 million t, down 3.8% from the previous year's level of 20.2 million t (Figure 5). Other market estimates point to a similar decline.
In its September assessment, COCERAL forecast EU rapeseed production at approximately 20.0 million t, down 2.4% year-on-year, while Expana estimated output at 19.8 million t, a decrease of 3.4%.

Poland and Germany recorded the largest production declines, each down around 0.5 million t (14.4% and 11.9% year-on-year, respectively). By contrast, output increased by 234,000 t in Romania (+9.4%) and by 112,000 t (+2.4%) in France, the EU's largest producer.

Overall, the expansion in harvested area helped cushion the impact of lower yields, keeping EU rapeseed production only moderately below the previous year's high level.

2027 crop faces a dry start
Meanwhile, dry conditions have disrupted rapeseed sowing for the 2027 harvest in several EU countries, particularly Hungary and France. According to Expana's late-September forecast, the EU rapeseed area could decline slightly to 6.3 million ha. In France, the decline could reach as much as 10-15%.

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



* estimation
Source: DG AGRI

Price developments

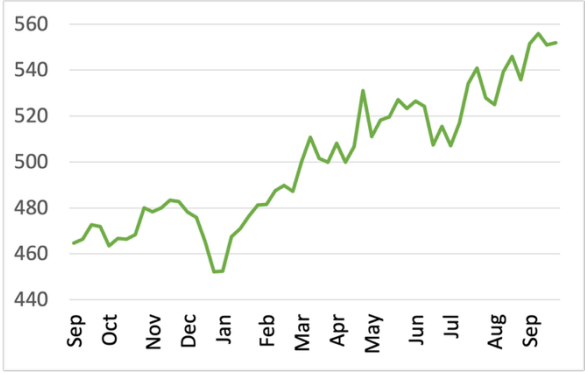
Non-GM rapeseed on Euronext (for Nov delivery) traded at around EUR 550/t in late September (Figure 6). Prices generally increased in August and the first half of September, following considerable fluctuations in July.

Rapeseed market developments over the past three months were mainly driven by crude oil and vegetable oil prices, influenced by geopolitical tensions in the Middle East, biofuel demand and palm oil supply developments. In September, higher Ukrainian rapeseed prices and a weaker euro provided additional support, although falling crude oil and vegetable oil prices weighed on the market later in the month.

On the physical market, rapeseed prices followed a similar trend, rising in August and the first half of September before easing later in the month. At the end of September, oil mills in Germany paid around 540-550 EUR/t, while prices delivered to Moselle in France stood at approximately 535 EUR/t, both close to their end-August levels.

Looking ahead, lower EU rapeseed crushing and reduced meal availability could provide further support to rapeseed meal prices in the coming months.

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



*until end of September
Source: MATIF

Non-GM supply & demand

The EU Non-GM rapeseed and rapeseed meal supply outlook remains tight for 2026/27, with domestic rapeseed production, crushing and imports all expected to decline. EU rapeseed imports are forecast to fall by around 7% to 6.4 million t. Supplies from Ukraine, a key Non-GM supplier, remain constrained by increased domestic processing and logistical challenges.

On the demand side, poor forage harvests could increase demand for protein feed from dairy farms, although shrinking livestock herds may partly offset this increase. Overall, tighter supplies could support Non-GM rapeseed meal prices in the coming months.

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

Similarly to the maize market, the vast majority 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 larger volumes of GM rapeseed are imported from Australia and Canada 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 6.9 million t over the last 5 years (2021-2025). DG AGRI forecasts that the total EU-27 rapeseed import will reach 6.4 million t in the 2026/27 marketing season.

The rapeseed import in the EU-27 comes from countries with varying adoption rates of GM rapeseed. Australia and Ukraine are the most important rapeseed exporters to the EU, accounting for 45% and 37% of the total EU import respectively (five-year average of 2021-2025). 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 11% in the total rapeseed import of the EU (five-year average of 2021-2025). 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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