MARKET REPORT
Edition 10/April 2026

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 & demand in the current (2025/26) and the upcoming (2026/27) marketing year.

- EU Non-GM soy availability will remain uneven across regions in the coming months, Non-GM maize supply is tighter than a year earlier, while Non-GM rapeseed supply remains comfortable.
- DG AGRI expects the EU-27 soy and rapeseed area for the 2026 harvest to increase from the previous year, while maize area is forecast to decline further in the bloc.
- Also in 2026, only Non-GM soy and rapeseed varieties are grown in the EU-27, while maize remains almost entirely Non-GM, with GM maize accounting for only around 1% of output.
- Brazil is expected to remain a key supplier of Non-GM soy to Europe in 2026, despite its segregated Non-GM soy production in 2025/26 staying near the historic low of 1.5 million t.
- Rising energy prices linked to the Middle East crisis in March lifted crop prices, including Non-GM soy, maize and rapeseed, and improved the outlook for EU-27 soy planting.

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 Non-GM soybean availability remains uneven, with adequate supply in Italy but tighter availability in Central Europe.
- DG AGRI forecasts EU-27 soy area at 1.03 million ha in 2026, the third-highest on record. All of it is Non-GM.
- EU-27 soy output is forecast to rise by 2.4% to 2.82 million t in 2026.
- Higher fertiliser prices, CAP support, and GM-free and deforestation-free demand trends support EU-27 soy expansion.
- Non-GM soybean prices at the Bologna Exchange rose to close to 450 EUR/t in mid-March before easing to around 420 EUR/t in mid-April.
- Brazil continues to support Europe's Non-GM supply chain, although its segregated Non-GM soy production in 2026 is expected to remain near the historically low level of 1.5 million t.

Crop forecast

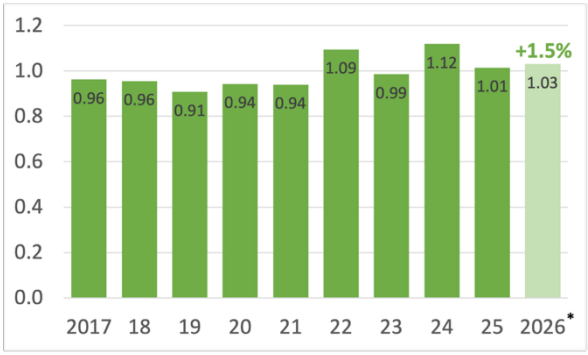
The soy sowing season normally starts in the second part of April in most EU countries. All soy produced in the EU is Non-GM (Box 1 on the next page).

In its estimate published at the end of March, the European Commission forecast EU-27 soy area to increase by 1.5% to 1.03 million hectares (ha) in 2026, which would make it the third-largest area on record (Figure 1 on the next page). Soy output is currently forecast to rise by 2.4% to 2.82 million tonnes (t) in the bloc.

Forecasts by consultancy Expana and grain trade association COCERAL point in the same direction. Expana projects EU soy area to increase by 4% to 1.12 million ha, while COCERAL expects a 2.5% rise to 1.1 million ha in 2026.

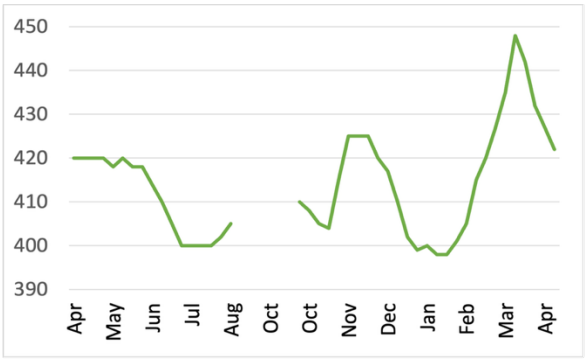
The expected increase in EU-27 soy area is mainly driven by high nitrogen fertiliser prices, which improve soybeans' competitiveness against crops such as maize. At the same time, Common Agricultural Policy (CAP) and protein-crop support, along with crop-rotation requirements, continue to favour soy planting in the EU. Demand-side trends, including interest in GM-free and deforestation-free soy, are also helpful.

Figure 1 Non-GM soy area development in the EU-27 (million h)



*forecast
Source: DG AGRI

Figure 2 Non-GM soybean price at the Bologna Exchange over the last year (weekly average, EUR/t)*



*until mid-April, estimations based on the Bologna Exchange;
Source: Donau Soja

Price developments

Non-GM soybean prices at the Bologna Exchange — a key benchmark for the EU — rose strongly, by around 10%, in the two months to mid-March and peaked at close to 450 EUR/t. Afterwards, prices eased and stood at around 420 EUR/t in mid-April (Figure 2).

In line with soybean prices, soymeal prices also increased in recent months. High-protein Non-GM soymeal prices in Northern Germany stood at 485–495 EUR/t in mid-April, up 8–10% compared with the beginning of the year.

Non-GM soybean and soymeal prices in the EU are closely linked to GM soy prices on CBOT (Chicago Board of Trade) futures, the main benchmark for global soy prices. Over the past three months, CBOT and global soybean prices were pulled in different directions.

Prices were pushed up somewhat by expectations that the US might require higher biofuel blending (= a higher share of biofuel mixed into conventional fuel), which could increase demand for soybean oil and, indirectly, soybeans. Hopes that China might buy more US agricultural products also supported the market at times.

At the same time, prices were held back by strong global supply. Brazil, the world's largest soybean producer and exporter, is expected to harvest another record crop in 2025/26, which should keep global soybean supply ample. Higher energy and fertiliser costs also affected the market by influencing farmers' planting decisions and broader sentiment in oilseed markets.

Non-GM supply & demand

Non-GM soybean availability in the EU remains uneven. Supply is still adequate in Italy, but noticeably tighter in Central Europe. Some lots of Non-GM soybean are still available in Ukraine, an important Non-GM soy supplier to the EU, although these are expected to be sold soon for delivery between May and July.

Against this background, Brazil remains an important supplier of Non-GM soy to Europe. Segregated Non-GM soy production in Brazil is expected to stay low at around 1.5 million t in 2025/26, broadly unchanged from the previous season and equivalent to only around 0.85% of total soy output.

Even so, this volume should remain sufficient to support European imports of certified Non-GM soy products, particularly for key animal protein segments such as dairy, poultry and eggs in the EU-27 through high-protein soymeal, as well as for salmon aquaculture in Norway through soy protein concentrate (SPC).

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. 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

- EU Non-GM maize supply is tighter than a year ago due to lower imports from Ukraine, but current volumes still appear sufficient.
- DG AGRI expects EU-27 the maize area to fall by a further 1.3% to 8.4 million ha in 2026, as drought risk and high fertiliser costs remain key concerns.
- Despite lower maize area, EU-27 output is expected to recover moderately in 2026 on better yields.
- More than 99% of EU maize output is Non-GM, while GM maize is grown only in Spain and Portugal.
- EU Non-GM maize prices rose sharply in late February, supported by higher energy prices and geopolitical tensions.

Crop forecast

The maize sowing campaign started in early April in the EU. More than 99% of maize area in the EU is Non-GM; GM maize variety is grown only in Spain and Portugal (see Box 2).

Maize Area Down Again In 2026

Different organisations have published somewhat different forecasts, but all point to a further decline in EU-27 maize area in 2026. According to DG AGRI's forecast published in late March, EU-27 maize area is expected to fall by 1.3% year on year to 8.4 million ha in 2026 Figure 3). If realised, this would place the maize area around 10% below the level of five years earlier, when it stood at 9.2 million ha.

The outlooks of COCERAL and Expana point in the same direction. COCERAL projects a 3.4% decline to 8.1 million ha, while Expana expects a steeper fall of 7% to 7.6 million ha.

Two broader factors are driving this downward trend. Firstly, maize has become a riskier crop, as repeated drought and heat stress have reduced yields in several recent years, especially in south-eastern Europe. Secondly, maize is a relatively input-intensive crop, and the recent rise in fertiliser prices is encouraging some farmers to shift towards crops with lower fertiliser requirements.

Among the EU's main maize-producing countries, the planted area is expected to decline particularly in France and Poland in 2026.
DG AGRI forecasts a 4.1% decrease in France to 1.5 million ha and a 7.7% fall in Poland to 1.2 million ha. In Romania and Hungary, two other major maize producers in the bloc, the maize area is expected to remain broadly stable.

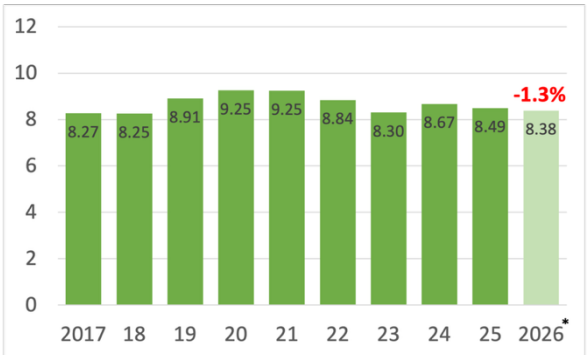
Mostly Favourable Sowing Conditions

Maize sowing conditions are generally favourable across most of Europe's main growing regions. In France, sowing started quickly under good conditions after a very wet February and a drier-than-average March. In Bulgaria and Romania, strong winter rainfall helped rebuild soil moisture reserves. Irrigation reservoirs in southern Europe are also much fuller than in recent years. However, soils remain dry in Hungary, Austria, Poland, the Baltic states and eastern Germany, so further rainfall is needed in the coming weeks.

Higher maize output despite lower area

Although the harvest is still far away, early output forecasts point to a moderate recovery in 2026 because of improved yields compared with the drought-affected previous year. DG AGRI projects EU-27 maize output at 61.2 million t, up 5.3% year on year, in its late-March forecast.
COCERAL is slightly more cautious but still expects production to rise by 2.4% to 60.6 million t.

Figure 3 Maize area development in EU-27 (million ha)



* forecast
Source: DG AGRI

Price developments

EU Non-GM maize prices increased strongly in late February, rising by around 20 EUR/t, or 10–15%, before easing slightly by early April (Figure 4). On 9 April, the front-month June contract closed at 203 EUR/t on the MATIF Paris Exchange.

The price increase in late February was mainly linked to higher energy prices and geopolitical tensions in the Middle East. However, the upward movement remained limited, as global maize supply is still relatively abundant. USDA (U.S. Department of Agriculture) and other market observers continue to describe the global maize market as well supplied.

A similar upward trend was also seen on the physical market in recent weeks.

- In north-west Germany, feed producers were paying around 230 EUR/t at the end of March, up 10 EUR from the end of February.
- In Rotterdam, the CIF[1] price reached 235 EUR/t, which was 15 EUR higher than a month earlier.
- In south-west Spain, maize in silo was traded at 229 EUR/t at the end of March, up 10 EUR compared with the previous month.

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

*until 10 April
Source: MATIF

Non-GM supply & demand

The availability of Non-GM maize in the EU remains sufficient, but supply is tighter than a year ago. Lower deliveries from Ukraine, the EU's key external Non-GM maize supplier, have reduced available volumes, although these still appear sufficient for current Non-GM programmes.

More broadly, the EU maize market is expected to remain well supplied until the new harvest in autumn 2026, while maize's relatively high price compared with feed wheat is encouraging substitution in feed use.

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 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 & 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. The main source of import is Ukraine, 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.

[1]**CIF (Cost, Insurance and Freight):** a trade term indicating that the seller delivers arranges and pays for the transport and insurance of the goods to the agreed destination port. However, the risk passes to the buyer once the goods are loaded on the vessel a the port of shipment.

NON-GMO RAPE

Highlights

- Non-GM rapeseed meal availability in the EU remains comfortable for now, but could tighten somewhat before the new harvest.
- The EU-27 produces only Non-GM rapeseed, but remains structurally dependent on imports.
- DG AGRI forecasts EU-27 rapeseed area to rise by 1.9% to 6.2 million ha for the 2026 harvest, supported mainly by relatively favourable rapeseed prices.
- Despite larger area, EU-27 rapeseed output is forecast to decline slightly in 2026 as yields normalise from the previous year's high level.
- EU rapeseed prices rose strongly from late February to mid-April, supported mainly by stronger crude oil prices.

Crop forecast

Rapeseed is mainly grown as a winter crop in Europe. It is usually sown in early autumn and harvested the following summer. Only Non-GM varieties may be cultivated under EU law (see Box 3).

EU rapeseed area expands

EU-27 rapeseed area for the 2026 harvest is estimated at 6.2 million ha, up 1.9% year on year, according to the European Commission's estimate published in late March. In a similar range, COCERAL projected EU-27 rapeseed area at 6.3 million ha, up 2.3%. Expana was more optimistic and forecast a stronger increase of 7% to 6.5 million ha in 2026.

The expansion appears to be driven mainly by more favourable rapeseed prices and margins relative to cereals, as well as by good autumn sowing conditions in many producing regions. The crop was also supported by the strong performance of the previous season: the EU-27 average rapeseed yield reached around 3.33 t/ha in 2025, the highest level in the past ten years.

Higher area may not lift output

Despite the increase in area, EU rapeseed output is expected to decline slightly in 2026, as somewhat lower and more normal yields are likely to offset the gains from larger harvested area. DG AGRI forecasts EU-27 rapeseed production at 19.9 million t, down 1.2% year on year (Figure 5). COCERAL expects a somewhat larger decline of 2.1%, while Expana projects a marginal increase of 1%.

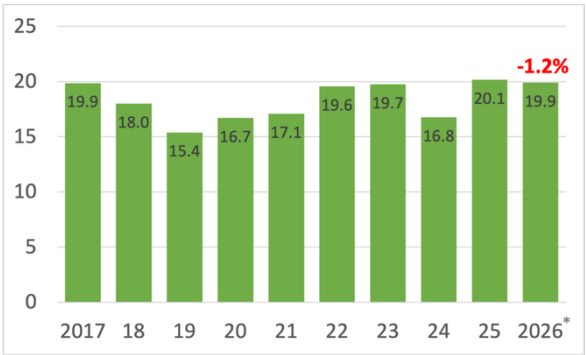
Among the major producers, rapeseed output in France is projected to decline by 2.4% to 4.5 million t. A decrease is also expected in Romania, where production could fall by 10.0% to 2.2 million t. In contrast, Germany and Poland, two other key producing countries, are both expected to increase output by around 6.5–7.0%.

Mostly favourable post-winter conditions

The outlook for the 2026 rapeseed harvest in Europe remains broadly positive. After winter dormancy, crops resumed growth under generally favourable conditions. Adequate soil moisture and mild late-winter temperatures supported development in many regions. Excessive rainfall in south-western Europe and parts of Eastern Europe caused temporary waterlogging and local flooding, but the impact on arable crops has so far remained limited, as March was significantly drier than average in most affected areas.

At the same time, emerging rainfall deficits in North-Eastern Europe should be monitored, as crop water demand is now increasing. Winter hardiness was generally good, although in the Baltic states and Eastern Poland some rapeseed areas were affected by frost and dry conditions.

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



* forecast
Source: DG AGRI

Price developments

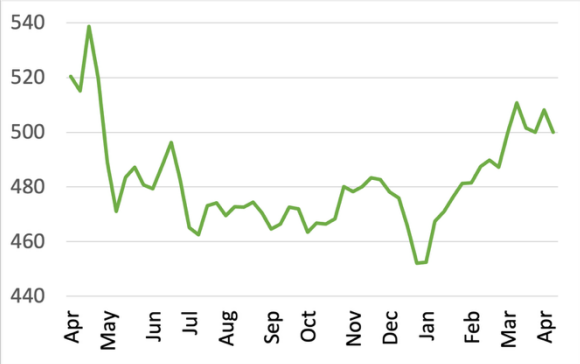
In mid-April, the front-month May 2026 rapeseed contract on Euronext closed at around 500 EUR/t, about 20 EUR/t higher than at the end of February (Figure 6). Prices were even stronger in late March, when the contract reached around 505–515 EUR/t, the highest level in about eleven months, before easing slightly afterwards.

In recent weeks, the EU rapeseed market was influenced mainly by volatile crude oil prices and biodiesel sentiment. At the same time, generally favourable crop conditions and a relatively comfortable new-crop supply outlook limited stronger price gains.

Further price developments will depend on the course of the conflict in the Persian Gulf / Middle East. Weather risks in parts of North-Eastern and Eastern Europe, as well as developments in competing vegetable oils, also remain important market factors.

The physical rapeseed market broadly followed the fluctuations in futures prices. Farmers used the recent price strength to market parts of the 2026 harvest. Prices for rapeseed meal also rose in March, reaching their highest level in nine months. In the Upper Rhine region, rapeseed meal was fetching around 260 EUR/t ex-oil mill at the end of March, which was 15 EUR/t more than at the end of February.

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



*until 10 April

Source: MATIF

Non-GM supply & demand

The availability of Non-GM rapeseed meal in the EU remains comfortable for now but may become somewhat tighter until the new harvest. This is because oil mills are expected to process more GM rapeseed from Canada and Australia, even though overall EU rapeseed meal production remains stable.

Globally, rapeseed supply remains ample after the record 2025/26 harvest, and the outlook for 2026/27 is also favourable due to larger acreage. At the same time, firm biodiesel demand is likely to keep rapeseed prices relatively high, so securing required Non-GM volumes in good time may be advisable.

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 6.9 million t over the last 5 years (2021-2025). DG AGRI forecasts that the total EU-27 rapeseed import will reach 5.9 million t in the next 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.

Published by ENGA, in close cooperation with Donau Soja and ProTerra

Donau Soja, ProTerra Foundation and Kaack Terminhandel Info-Dienst (www.kaack-terminhandel.de) provided market information for this report.

ENGA AISBL
Rue du Trône 194, 1050 Ixelles
Phone: +32 (0) 493 33 5491
Email: info@enga.org
www.enga.org
www.donausoja.org
www.proterrafoundation.org

Disclaimer: While all efforts have been made to provide accurate and reliable estimates, some uncertainties within the results shown may remain.