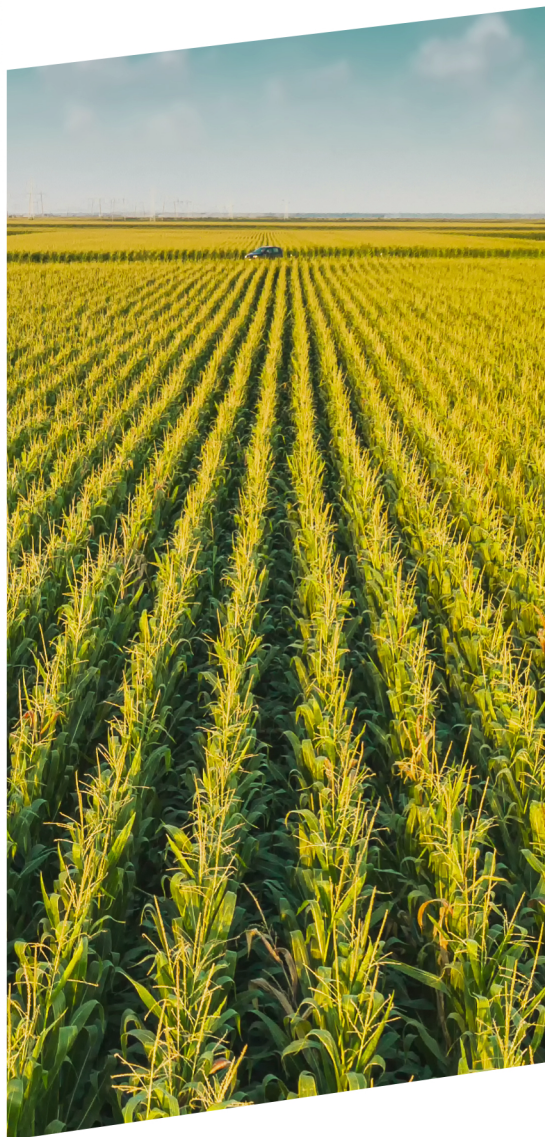


NON-GMO SOY NON-GMO MAIZE NON-GMO RAPESEED



HIGHLIGHTS

The following points summarise the major trends and recent developments that affect the EU Non-GM supply & demand in the current (2025/26) and the upcoming (2026/27) marketing year.

- EU Non-GM supply is tighter than usual across the soy, maize and rapeseed markets, mainly due to the seasonal gap before the new-crop harvest and lower Non-GM imports.
- EU soy area remained broadly stable in 2026, rapeseed area rose by 3.6%, and maize area fell to its lowest level since 1993, according to estimates of DG AGRI published in late June.
- EU output of all three crops is forecast to decline in 2026, only marginally for maize and rapeseed, as late-June heat and depleted soil moisture raised yield risks.
- EU crop production is overwhelmingly Non-GM, but imports of soy, maize and rapeseed include GM material, with GM share particularly high in soy imports at over 80-85%.
- Brazil remains essential for supplying High-Protein Non-GM soymeal and SPC, particularly to Northwest Europe, helping to offset limited regional availability in this region.



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 market is tightening in mid-summer as stocks from last year's European and Indian harvests are being exhausted.
- The EU Non-GM soy area is estimated to have remained broadly stable in 2026, while late-June heat and declining soil moisture have raised yield risks.
- EU soy output is forecast to decline by 0.9% to 2.8 million tonnes in 2026, according to DG AGRI's forecast published in late June.
- All EU-grown soy is Non-GM, but most supply is imported and largely GM.
- EU Non-GM soybean prices climbed above 450 EUR/t in Bologna and 480 EUR/t in southern Germany by mid-July.
- Despite constrained segregated supply, Brazil remains a key source of High-Protein Non-GM soymeal and SPC for Northwest Europe.

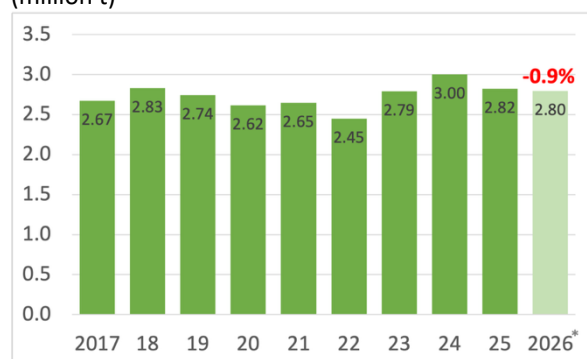
Crop forecast

All soy produced in the EU is Non-GM (Box 1 on the next page). Donau Soja expects the EU soy area to stagnate or grow only marginally in 2026, reaching around 1.1 million hectares (ha). Other organisations, including DG AGRI, Expana and COCERAL, also expect only limited changes in the EU soy area in 2026. EU soy output is forecast to decline in 2026—by 4% according to Donau Soja and by 0.9% according to DG AGRI estimates published in late June (Figure 1 on the next page).

Based on information available up to mid-June, the general outlook for the EU soy crop remained favourable, although risks were increasing. Soy sowing in Europe was largely completed by early June, with some delays in Italy and Ukraine, the two leading soy producers in the region.

Late-June heat and depleted soil moisture in parts of central and western Europe increased yield risks. Adequate rainfall in July will therefore be important, as by late July EU soy is typically in the flowering to early pod-setting stage, when water availability and moderate temperatures are crucial for protecting yield potential.

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



*forecast

Source: DG AGRI

Price developments

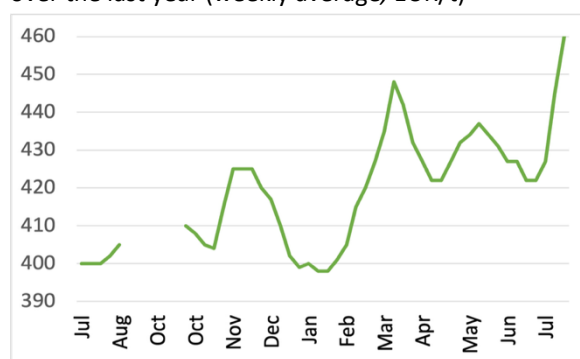
Non-GM soybean and soymeal prices in the EU increased between mid-April and mid-July. At the Bologna Exchange, a key EU benchmark, Non-GM soybean prices reached over 450 EUR/t by mid-July, around 5-10% higher than three months earlier (Figure 2). In southern Germany, a major Non-GM soybean-crushing region, prices increased more strongly, reaching over 480 EUR/t by mid-July – around 10–15% above their mid-April level.

Soymeal prices followed the same trend. High-Protein Non-GM soymeal in northern Germany, a key Non-GM user region in Europe, stood at around 530 EUR/t in mid-July, about 6% higher than in mid-April.

Global soybean prices were volatile over the period, falling in June before recovering in early July as weather risks became apparent. Renewed Chinese buying interest and concerns about hot and dry conditions in the US Midwest supported the rebound. In the EU, this recovery in global markets, together with tighter Non-GM availability, provided further support to soybean and soymeal prices.

However, the price increase in the global market was partly limited by strong South American supply. Brazil remained highly competitive in export markets, supported by a large crop and a favourable supply outlook. USDA (United States Department of Agriculture) projected very large South American soybean supplies for 2026/27, with Brazil forecast at a record 186 million t and Argentina at around 50 million t.

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



*until mid-July, estimations based on the Bologna Exchange;

Source: Donau Soja

Non-GM supply & demand

By July, the EU Non-GM soy market appears increasingly tight, with limited offers as some buyers return and request additional volumes by vessel and rail. Ukrainian old-crop export availability has largely ended, while major sellers are waiting for the new crop and currently offering little volume.

Supply may still cover immediate demand, but availability is tighter in Central Europe and nominal prices are rising. Indian Non-GM soymeal supply is also significantly lower this year, further reducing alternative import availability.

Despite constrained segregated supplies, Brazil remains a key source of high-protein Non-GM soymeal and SPC, particularly for Northwest Europe. Brazilian supply should cover current demand, but offers limited flexibility if European demand strengthens or new-crop prospects weaken.

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 remains sufficient, but lower imports and high transport costs have reduced availability in deficit regions.
- The EU maize area fell by 3.3% to 8.18 million ha in 2026, its lowest level since 1993, according to DG AGRI's June estimate.
- EU maize output is forecast at 59.9 million t in 2026, slightly below last year's level, according to DG AGRI.
- More than 99% of EU maize output is Non-GM, while GM maize is grown only in Spain and Portugal.
- Euronext Non-GM maize prices exceeded 240 EUR/t in mid-July, up 10–15% from mid-April amid growing weather concerns.

Crop forecast

More than 99% of the maize area in the EU is Non-GM. GM maize is grown only in Spain and Portugal (see Box 2). By the end of July, EU maize is in one of the most sensitive stages of development: flowering and early grain setting.

In its late-June projection, the European Commission put the EU grain maize area at 8.18 million ha in 2026. This is 3.3% below one year earlier and represents the smallest area recorded since data collection began in 1993. The decline reflects a shift by farmers towards lower-risk or more profitable crops, following recent years of drought, poor yields, high production costs and weaker maize prices.

According to the June MARS report, DG AGRI's monthly crop-monitoring assessment, the EU maize yield is projected at 7.38 t/ha, 4% above the five-year average and also above last season's level. However, this estimate mainly reflects crop and weather conditions up to mid-June. The late-June heatwaves were not yet fully taken into account and could put downward pressure on later yield forecasts.

DG AGRI's June forecast put EU maize production at 59.9 million t, down 0.5% year-on-year (Figure 3). COCERAL, the European grain and oilseed trade association, has a similar outlook, forecasting EU maize output at 57.2 million t in 2026, 1.0% below 2025.

The largest declines in EU maize output are expected in France and Poland, the two leading EU producers, with production forecast to fall by around 2.3 million t and 1.4 million t, respectively, or roughly 13–16%.

In contrast, Bulgaria is expected to recover strongly to 2.7 million t in 2026, after dropping to only 980,000 t in 2025, when severe drought and heat pushed both area and yields to historic lows.

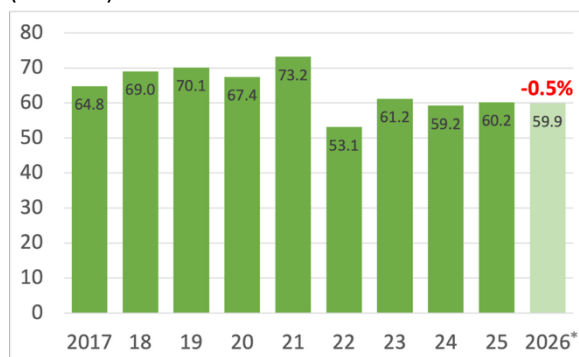
Fair Start, but Weather Risks Increasing

Overall, EU maize started the season under mixed but still broadly fair conditions, as most problems were regional rather than EU-wide. Spring dryness had already reduced soil moisture in central, eastern and northern Europe, while cool and wet weather delayed sowing and early development in parts of south-eastern Europe, especially Romania and Bulgaria.

In June, maize and other summer crops developed well in many regions, but rising water demand made the crop more vulnerable. Heatwaves and limited rainfall raised concerns in areas with already depleted soil moisture, particularly in south-western Germany, eastern France, Hungary and western Romania.

By late July, the key issue for EU maize will be whether heat and rainfall deficits persist during flowering and early grain setting, when stress can reduce yield potential.

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



* forecast

Source: DG AGRI

Price developments

Non-GM maize at Euronext traded at over 240 EUR/t in mid-July, based on the front-month August contract, up around 10-15% compared with mid-April.

Prices increased mainly in June and early July, supported by lower EU area estimates and growing weather concerns. At the same time, gains were partly limited by the still relatively comfortable global maize supply outlook.

On the European spot market, prices for the old crop rose, while trading in the new crop saw very little activity; farmers are waiting to see how weather and price trends develop.

In northwest Germany, compound feed manufacturers paid 245 EUR/t for July-delivery maize at the end of June—an increase of 4% over the previous month.

In Spain, which meets its maize needs primarily through imports from the US and Brazil, prices remained stable at 225 to 235 EUR/t.

By contrast, Ukrainian export prices moved lower. At the end of June, maize prices at UA ports stood at 205–217 USD/t (179–189 EUR/t), around 10% below their end-May level.

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



*until 17 July

Source: MATIF

Non-GM supply & demand

EU Non-GM maize supply remains sufficient for current demand, but availability has become less comfortable as imports are lower year-on-year and transport costs keep prices high in deficit regions.

For 2026/27, the supply outlook has become more uncertain due to the smaller EU maize area and higher weather-related yield risks.

Demand remains supported by feed use and Non-GM export opportunities, especially to Turkey, while availability will also depend on Ukrainian exports and EU weather conditions.

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.

NON-GMO RAPE

Highlights

- Before the July harvest, EU Non-GM rapeseed supply remained limited due to low old-crop stocks and lower imports.
- EU rapeseed output in 2026 is forecast at 19.8 million t, slightly below last year's peak, according to DG AGRI.
- Late frosts and June heatwaves increased risks for the EU rapeseed yield outlook.
- Non-GM rapeseed prices on Euronext weakened slightly in June and stabilised at around 505–510 EUR/t in early July.
- Weaker crude oil and vegetable oils, along with harvest pressure, pushed Non-GM rapeseed prices lower in June.
- All rapeseed produced in the EU-27 is Non-GM. But imports are needed to cover demand.

Crop forecast

The 2026 EU rapeseed harvest was under way by mid-July and progressing across the main producing regions. As the season progresses, market attention is increasingly shifting from crop development to actual yields, quality and regional harvest results. Only Non-GM rapeseed varieties can be cultivated in the EU (see Box 3 on the next page); therefore, all figures below refer to Non-GM rapeseed.

Production slips from 2025 peak

According to DG AGRI's late-June estimate, the EU rapeseed area for harvest in 2026 is expected at 6.3 million ha, up 3.6% year-on-year.

The June issue of the MARS report estimates the EU rapeseed yield at 3.18 t/ha, which is 1% below the five-year average and 5% below the historically high 2025 yield of 3.34 t/ha.

As a result, EU rapeseed output is forecast at 19.8 million t, down 1.8% from the very high level recorded in the previous year (Figure 5).

Frost and heat pressure rapeseed outlook

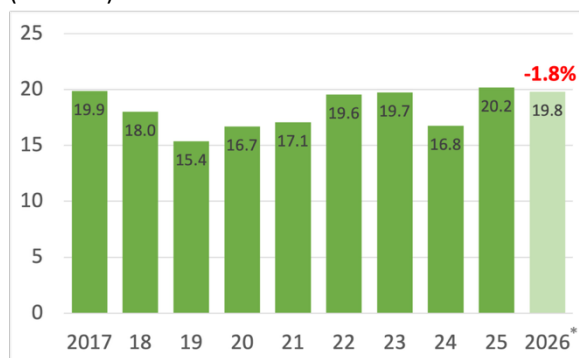
Winter rapeseed crops in Europe initially developed well. However, the European crop monitoring service MARS warns in a June report that late frosts may have affected rapeseed in Central and Eastern Europe.

Cold spells in late April and early May caused minimum temperatures to drop below -5°C in some parts of Central Europe, including Poland, Czechia or Hungary. These frost events occurred during sensitive development stages, particularly flowering, and reduced the number of blossoms and crop fertility locally.

In Central and Western Europe, rapeseed crops suffered from record temperatures in late June. Soils have dried out in several countries, including France, Poland, the Baltic states, Czechia, Austria, Slovakia and Hungary. The June MARS report, which assessed crop developments up to mid-June, forecast EU rapeseed yields close to the average level. However, the exceptional heatwaves in the second half of June may have added further pressure and could push final yields below the earlier forecast.

Among the main producing regions, DG AGRI expects the largest production decreases in Poland and the Baltic states, where output is projected to fall by around 10–20% year-on-year. By contrast, the largest increase is expected in Germany, where production is forecast to rise to 4.2 million t, up by 255,000 t, or 6.5%. France, the EU's largest rapeseed producer, is expected to harvest a crop similar to last year, at around 4.7 million t.

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



* forecast

Source: DG AGRI

Price developments

Non-GM rapeseed prices came under pressure in June. The Euronext August front-month contract declined by around 4% over the month and traded at around 505–510 EUR/t in early July, before moving up again in mid-July (Figure 6).

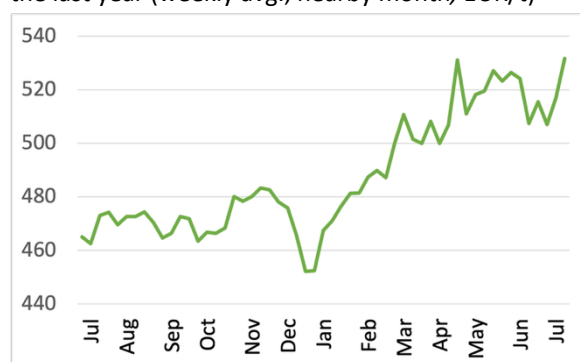
The decline in June was even stronger on the spot market. In the Upper Rhine region, rapeseed prices were around 500 EUR/t at the end of June, roughly 9% lower than one month earlier.

The market followed the weaker trend in crude oil and vegetable oils. Crude oil prices fell sharply in June after the truce between the US and Iran, and this pressure spilled over into vegetable oil markets. CBOT (Chicago Board of Trade) soybean oil prices dropped by 14%, while Malaysian palm oil prices remained broadly stable.

Oilseed meal markets also weakened in June. CBOT soybean meal prices fell by 8%, and European rapeseed meal prices followed the same trend. In Germany, oil mill selling prices declined to 250–270 EUR/t by the end of June, around 13% lower month-on-month.

Abundant global oilseed meal supplies are expected to keep rapeseed meal prices under pressure in the next months.

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



*until 17 July

Source: MATIF

Non-GM supply & demand

The EU Non-GM rapeseed supply situation remains tight, with limited old-crop availability and sharply lower imports. In the first nine months of 2025/26, EU rapeseed imports reached 4.47 million t, down 22% year-on-year, while Ukrainian exports also declined as more rapeseed is processed domestically.

New-crop availability remains uncertain after extreme weather reduced the EU harvest outlook to 19.8 million t, around 400,000 t below last year's harvest. EU rapeseed processing is nevertheless expected to stay stable at around 25.1 million t in 2026/27, keeping rapeseed meal supply close to last year's level.

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

© Copyrights 2026 ENGA, Donau Soja, ProTerra - All Rights Reserved.

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