

## Market evolution: Cereals (CN 10) — 2015–2025

### Introduction

Cereals (Combined Nomenclature code 10) cover wheat, maize, barley, rice and other grains. This report examines the European Union's trade with non-EU partners from 2015 to 2025, using annual data from the General Overview. Over the decade the EU's long-standing cereals surplus has nearly disappeared, import dependence has risen sharply, and the geographical pattern of trade has been reshaped by geopolitical shocks and production constraints.

### 1. A Vanishing Trade Surplus: The EU's Shift from Net Exporter to Near-Balance

**The trade balance collapsed by 88.2 %, driven by a 65.3 % surge in import value.**

Between 2015 and 2025, the EU's cereal trade surplus shrank from €4.74 billion to just €0.56 billion (Overview). Exports dipped 8.5 % to €9.01 billion, while imports rose 65.3 % to €8.45 billion. The net-import reliance indicator, available to 2024, climbed from 6.3 % to 31.3 %, a 400 % jump (Net import reliance).

| Indicator                  | 2015  | 2025   | Change   |
|----------------------------|-------|--------|----------|
| Exports (€ bn)             | 9.85  | 9.01   | –8.5 %   |
| Imports (€ bn)             | 5.11  | 8.45   | +65.3 %  |
| Trade balance (€ bn)       | 4.74  | 0.56   | –88.2 %  |
| Net import reliance (2024) | 6.3 % | 31.3 % | +400.3 % |

**Import volumes rose 42.8 % while export volumes fell 16.7 %, widening the physical import-export gap.**

Quantities tell a similar story: exports dropped from 47.4 million tonnes to 39.5 million tonnes, whereas imports increased from 21.1 million tonnes to 30.2 million tonnes (Overview). The volume deficit (exports minus imports) narrowed from 26.2 Mt to 9.3 Mt, underscoring the EU's growing physical reliance on foreign grain.

## Import unit prices outpaced export unit prices, amplifying the value of incoming shipments.

Average export prices rose 9.8 % (from €208/t to €228/t), while import prices climbed 16.1 % (from €241/t to €280/t). The 2022 spike—when import prices hit €348/t and export prices reached €364/t—was a pivotal moment that permanently lifted the import bill even after prices moderated.

## 2. Geopolitical Upheaval and the Redrawing of Trade Partnerships

### Ukraine became the top import source, but its share peaked in 2023 as the EU diversified towards the Americas.

Ukraine's exports to the EU grew from €1.64 billion (2015) to €2.27 billion (2025, +38.5 %), peaking at €5.02 billion in 2023 (Top partners). At the same time, imports from Brazil (+210.9 %), Canada (+89.2 %) and especially the United States (+232.5 %) surged, while Russia collapsed (−98.8 %) after 2022.

| Top import partners | 2015 (€ m) | 2025 (€ m) | Change   |
|---------------------|------------|------------|----------|
| Ukraine             | 1 636      | 2 265      | +38.5 %  |
| Brazil              | 190        | 590        | +210.9 % |
| Canada              | 685        | 1 297      | +89.2 %  |
| United States       | 415        | 1 380      | +232.5 % |
| Russian Federation  | 234        | 3          | −98.8 %  |

### Export markets pivoted to Morocco, Nigeria, and the United Kingdom, offsetting losses in Algeria and Saudi Arabia.

Exports to Algeria (−37.3 %), Saudi Arabia (−30.0 %) and Egypt (−49.5 %) fell markedly. In contrast, shipments to Morocco soared 123.3 % to €1.07 billion, to Nigeria by 338.9 % to €0.41 billion, and to the United Kingdom by 26.1 % to €0.71 billion (Top partners). China, once a volatile but large buyer, dropped 78.7 %.

### The 2022 grain price shock triggered simultaneous disruptions across multiple export and import flows.

Several bilateral price shocks were detected in 2022 (Price shocks). On the export side, the most extreme were Jordan (price shift +67 %, abnormality 9.7), South Africa (+75 %, abnormality 8.0), and Cameroon (+64 %, abnormality 7.6). On the import side, Canadian grain prices jumped 61 % (abnormality 8.2). These events illustrate how the global price surge following Russia's invasion of Ukraine rippled through the EU's grain trade.

## **Partner concentration declined slightly, indicating a gradual diversification of both origins and destinations.**

The Herfindahl-Hirschman Index (HHI) for imports fell from 1 473 to 1 363 (–7.4 %) and for exports from 565 to 494 (–12.5 %) (Concentration). Although imports temporarily concentrated on Ukraine in 2023, the subsequent rise of American and Canadian supplies helped restore a moderately diversified import base.

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## **3. Production Limits and the Eastward Shift in EU Cereal Export Capacity**

### **EU cereal production volume contracted while farmgate values surged due to higher prices.**

Between 2015 and 2024, production quantity fell from 3.07 billion tonnes to 2.59 billion tonnes (Production volumes). Over the same period, production value rose from €2.15 billion to €3.38 billion, reflecting a sharp increase in domestic cereal prices. The combination of lower harvests and higher costs limited the volume of grain available for export.

### **The export engine moved east: Romania, Bulgaria, and the Baltic states gained prominence as France and Germany lost ground.**

France remained the largest EU exporter but its sales dropped 37.3 % to €2.26 billion, while Germany's shrunk by 51.0 %. In contrast, Romania grew 73.2 % to €2.30 billion, Bulgaria surged 167.6 % to €0.96 billion, Lithuania (+53.5 %) and Latvia (+39.4 %) also expanded (Top reporters). This re-balancing reflects both competitive advantages in eastern production and logistical shifts.

### **Wheat remained the cornerstone of exports, but maize dominated imports, reflecting a structural feed deficit.**

In 2025, wheat (CN 1001) accounted for €5.90 billion of exports (65 % of total cereal exports), though volume declined from 31.8 Mt to 27.3 Mt (Product segment). Imports were dominated by maize (CN 1005) at €4.15 billion (49 % of cereal imports) and wheat at €2.03 billion. The persistent maize deficit, driven by demand for animal feed, is the primary factor behind the rising import bill.

### **In 2025, Bulgaria, Croatia, and Latvia were the most specialised cereal exporters, highlighting a persistent East-West divide.**

Based on the revealed symmetric comparative advantage (RSCA) index, Bulgaria (0.72), Croatia (0.69) and Latvia (0.66) were the most specialised EU member states in cereals

exports, while Ireland (−0.98), Malta (−0.96) and the Netherlands (−0.58) were the least specialised (Specialisation). This specialisation pattern mirrors the geographical shift in production and export capacity towards Central and Eastern Europe.

## Conclusion

The EU's cereal trade over 2015–2025 has undergone a fundamental transformation. A once-comfortable surplus has been eroded to near-balance, while net-import reliance has quintupled. The import surge is both volumetric—fuelled by a structural shortage of feed maize—and value-driven after the 2022 price shock. Geopolitically, the loss of the Russian supply has been offset by expanded imports from Ukraine, Brazil, Canada and the United States, while export markets have diversified away from traditional MENA destinations towards Morocco, Nigeria and the UK. On the supply side, declining production volumes and the eastward shift of export-oriented cereal farming have reshaped intra-EU dynamics. Taken together, these trends point to a more open, more volatile, and structurally more dependent EU cereals sector.

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If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at [support@tradedashboard.eu](mailto:support@tradedashboard.eu). You can find my CV at [this address](#).