

Global Oat Market Weekly Highlights

- Saskatchewan Oat Harvest Trails 2024 Pace — Quality Concerns Emerging.
- Manitoba Oat Harvest Winding Up: Strong Yields, Quality Risks in Wet Regions.
- Spain's Oat Market Transformation: Rising Milling Capacity and Processed Product Exports Drive Outlook to 2030.
- Colombia's Oat Product Imports Hit Record Pace — Chile Tightens Grip Through Freight and Currency Advantage.
- EU oat production raised this month, up YOY and above the average.

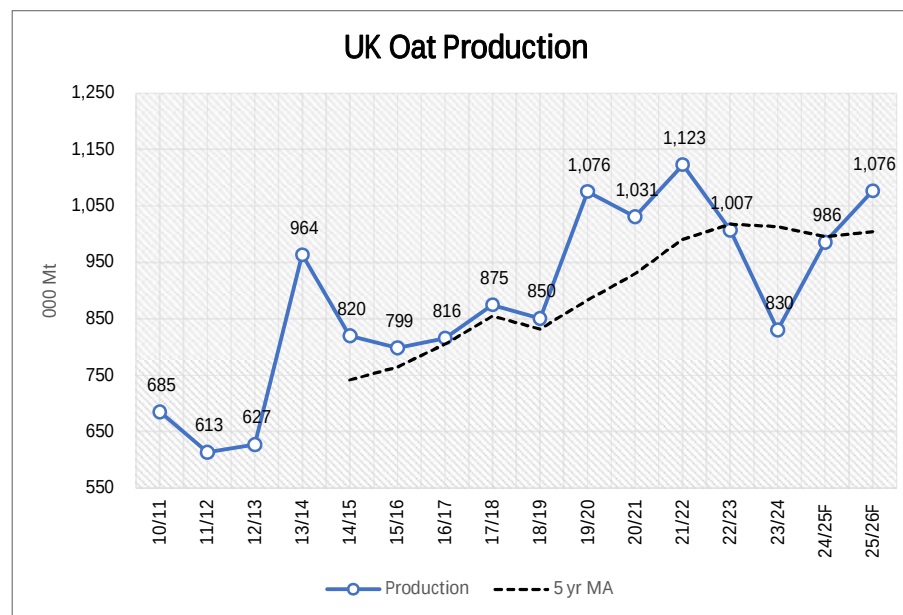
UK 2025 Oat Yield Falls Short of Long-Term Average but Production Still Climbs on Higher Area

The UK oat harvest is now complete, with yields averaging 5.2 t/ha, about 5% below the 10-year average. Winter oats performed relatively well, but spring oats lagged, pulling down national results. Quality concerns—particularly low specific weights—mean milling-grade availability may be tighter than headline yields suggest, posing challenges for millers and buyers

Based on the AHDB yield forecast, 2025 UK oat production is pegged at 1.076 ThMt, up 9.2% from 0.986 ThMt last year and 8.6% above the five year average (see chart right).

Key Highlights on Oats

- **Harvest Status:** 100% complete by 24 September 2025.
- **Yields:** 5.2 t/ha (vs. 5.5 t/ha 10-year average).



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- **Winter oats:** Good yields and specific weights (~53 kg/hl).
- **Spring oats:** Weaker, with lighter grain, pulling average specific weights down to 50 kg/hl (range 42–54).
- **Moisture:** Average 13.9%, acceptable but on the higher side.
- **Policy Factor:** The Sustainable Farming Incentive (SFI) may have limited spring oat yields by restricting seed rates and inputs

Insights

- **Below-par yields** highlight seasonal stress and policy influence.
- **Winter oats' stronger performance** shows their growing role in supply stability.
- **Spring oats' weaker quality** risks downgrades into feed channels, tightening milling supply.

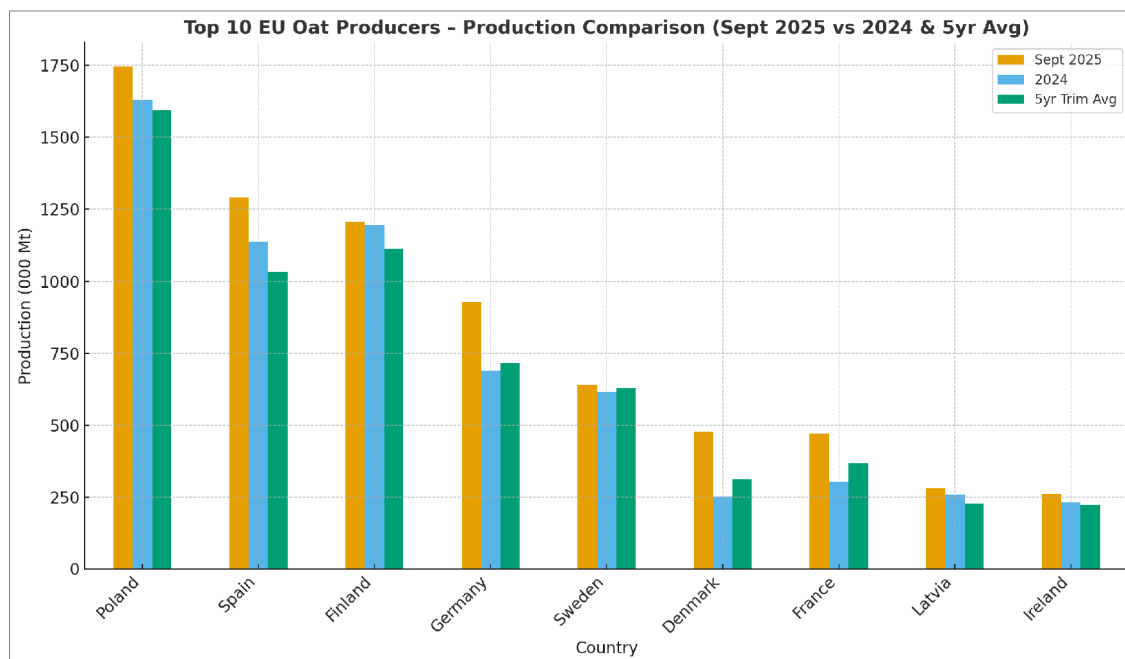
EU oat production now lives or dies by yields

EU oat production for 2025 is 8.77 Mt, up from 8.03 Mt in August and 17.3% above the 5-year trimmed average (7.48 Mt). The upgrade reflects stronger outcomes in Poland, Spain, Finland, and Germany. Structurally, EU oats are increasingly yield-driven (area is only modestly higher over time), which keeps the crop weather– a major concern year to year.

Production Snapshot (Sept 2025 vs Aug & 5-yr Trim Avg)

- EU-27 total: 8.77 Mt (+0.74 Mt vs Aug; +1.29 Mt vs 5-yr avg).
- Largest positive deviations vs 5-yr trimmed average (Mt): Spain +0.26, Germany +0.21, Denmark +0.16, Poland +0.15, Finland +0.09.

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- Near trend: Sweden (+0.01) and Ireland (+0.04).

Takeaway: Production strength is no longer concentrated only in the Nordics; Central (Poland/Germany) and Spain are carrying more of the EU volume (see chart below).

Structural Shifts (2016–2025)

- **Poland** remains the largest producer, broadly stable with gentle growth.
- **Spain** shows a clear uptrend since 2019.
- **Germany** moves higher post-2020 (area + yield).
- **Finland/Sweden** are stable without clear expansion.

Regional shares (EU-wide, all members)

- **Central EU: 33% (2016) → 39% (2025) ↑**
- **Nordics: 31.5% → 30.4% flat/slightly ↓**
- **Southern EU: 28.5% → 26.9% ~flat/slightly ↓**

Implication: The center of gravity is tilting toward Central EU, while Nordic and Southern shares are broadly steady to slightly lower (even though Spain individually is up).

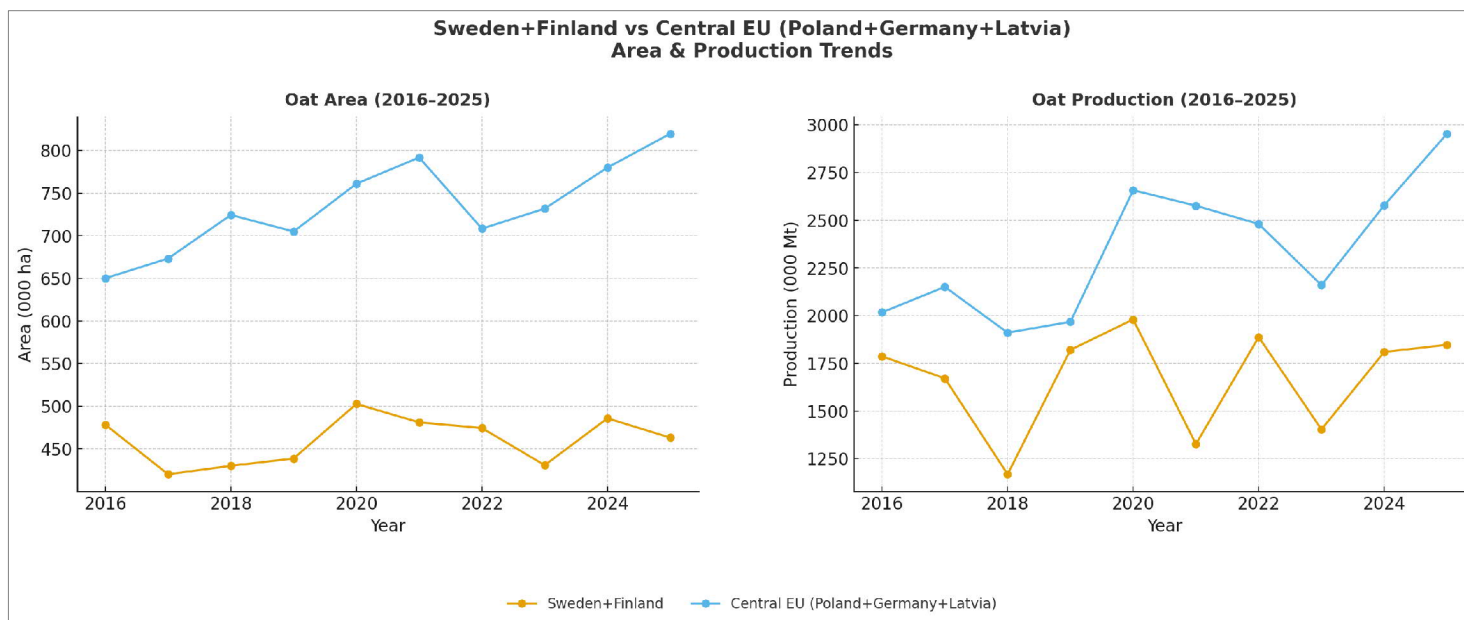
Area vs Yield — Why Yields Matter Most

- **Area:** EU-27 oat area grew modestly over the decade (+7.3% from 2016 to 2025), with ups and downs.
- **Yield:** The primary driver of year-to-year production swings. The 2025 uplift over 2024 is predominantly yield-led.
- **Implication:** With area only inching higher, weather-driven yield outcomes largely dictate whether the EU lands above or below trend each year.

Weather & Yield — Where the Risks Sit

- **Southern EU (Spain/France):** Heat/drought during grain fill → yield volatility and milling-quality risk (test weight/color).

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- **Nordics (Finland/Sweden/Baltics):** Excess rain/harvest delays → sprouting/test-weight downgrades (quality risk even when tonnage holds).
- **Central EU (Poland/Germany/Latvia):** Rainfall variability/late frosts → swing in yields; this block now moves the EU total most.

Market Implications

- **Short-term (2025/26):** Ample supply vs average; milling premiums soften unless Nordic harvest quality disappoints.
- **Medium-to-long term:** Modest area growth keeps reliance on yields high → weather = volatility. Diversify origins and embed spec-based terms (test weight/color/ β -glucan). Track NDVI/soil moisture/rain anomalies for timing coverage.

Bottom Line

2025 is a strong, above-trend year, but the EU oat balance still lives or dies by yield. With only modest area growth, weather remains the key risk to both availability and milling quality.



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- Randy Strychar