

MOLDOVA: WHEAT EXPORTS IS GROWING NOW, BUT OILSEEDS WILL WIN THE NEXT SEASON

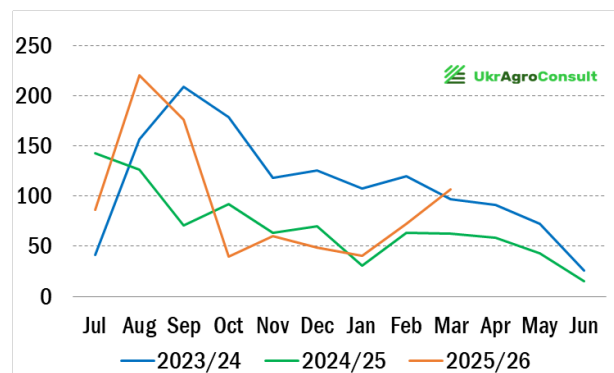
In 2025/26 Moldova is exporting wheat aggressively, but the long-term changing signal is about oilseeds. Farmers are shifting their crop preference in favour of sunflower.

Moldova is no longer just a small regional supplier. Moldova as a small country can much quickly specify the changes in the Black Sea-Danube-Balkan farm model. Drivers of the new model include margin decline, climate stresses and intensive competition.

Wheat exports are higher than expected. In July-March 2025/26, Moldova exported 852 K mt of wheat, above the previous season. Top buyers are Italy, Romania and Greece, with share of more than 75%.

March exports were unusual. Wheat exports remained high despite generally weak grain prices. But start of spring sowing and demand for inputs made farmers increase selling at stable low prices. Sure, farmers sold because they needed liquidity, not because they suddenly liked the price.

Moldova. Wheat exports, K mt

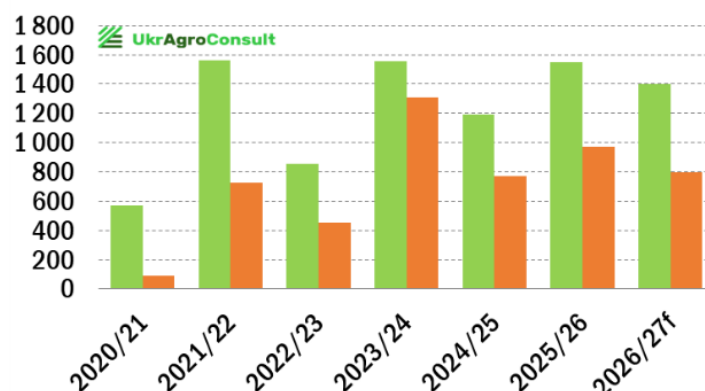


Source: UkrAgroConsult forecast based on trader polling, 2025/26, the State Statistics Committee of Moldova for 2023-2025, third - agroexpert.md

Wheat crop and exports may weaken in the next seasons, as the 2026 wheat production is expected to decrease.

- Winter wheat area is lower than usual. Weak prices, delayed harvest of the previous crop, and autumn rains reduced sowing, especially in the north of the country.
- Fertilizer and fuel costs are rising with possible lower yields.

Moldova. Wheat production and exports, K mt



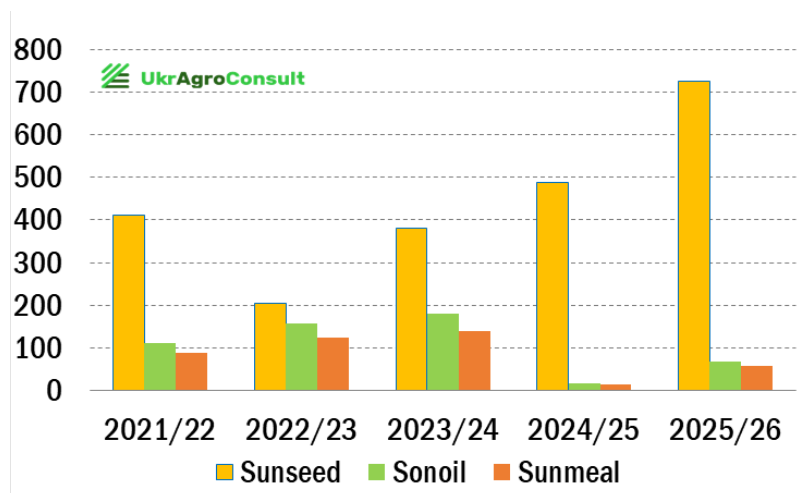
Source: UkrAgroConsult forecast for 2025/26, the State Statistics Committee of Moldova for 2023-2025

Corn remains Moldova's weakest point. In 2023-2025, average corn yield was only 2.2 mt/ha, or too low to keep corn margin high enough. That is likely to be the driver of downward trends in Moldova grain output and exports in the next 2026/27 season, while expanding oilseeds.

Rapeseed area confirms the shift as a crop with stronger margin prospects and better resilience. Winter rapeseed areas increased to 120 K ha, about 20% above the three years average. It looks like long term trend.

Sunflower is becoming the dominant crop. In July-March of the current season, Moldova exported a record 882.3 K mt of sunflower seed, meal and oil, the highest combined volume of the last five years.

Moldova. Exports of sunflower and processed products, K mt



Source: <https://agroexpert.md/>

The exports structure is even more significant. Raw seed share is 82% of total exports. Three years ago, a much larger share was exported as oil and meal.

This is explained by more attractive exporters' prices for raw sunflower than processors offers. This is a very important trend as in spite of the processing availability, raw SFS export margin is higher. Moldova will have to make choice in the nearest 2-3 years - to continue raw sunflower exports or to build stronger processing industry.

Turkey is the main destination for sunflower shipments, while oil and meal move mostly into European markets.

The new 2026/27 season looks supportive for sunflower seed production:

- smaller winter wheat area opens more room for spring crops;
- sunflower is beating corn because of better drought tolerance;
- demand from both exporters and processors keeps profitability above competing crops.

Most likely, sunflower will be the winner in Moldova 2026 crop competition.

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