

BULGARIAN BARLEY IN THE 2026/27: SMALL CROP WITH EXPORT AMBITIONS

The June USDA report made only limited changes to the global barley balance. The most important revisions were higher forecasts for Turkey and Ukraine.

World barley production, USDA forecast, June 2026

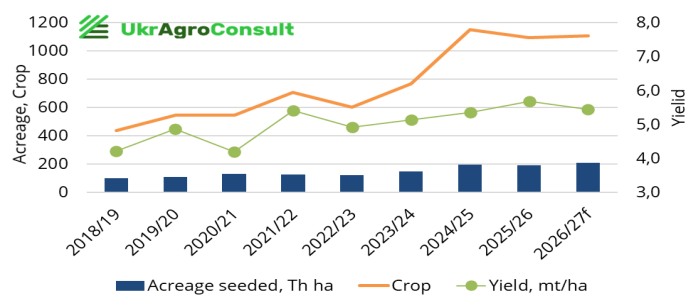


Turkey's barley crop was raised by 0.5 M mt to 8.8 M mt. Ukraine's crop was increased by 0.2 M mt to 5.5 M mt. EU barley production is expected at 53.0 M mt, down 5% vs. last season. New-crop harvesting is starting just in few days with growing supply which turns the market a buyer one, at least for short-term.

For exporters, the most important was the EU export cut to 7.4 M mt, down 0.2 M mt, and an increase in Ukraine's export forecast to 2.4 M mt, up 0.3 M mt. In 2026/27, global barley exports will be led by three groups of suppliers:

- The EU and Australia remain the top exporters, each with more than 7 M mt of potential exports;
- Russia and Argentina are the second group, with exports close to 4 M mt;
- Ukraine and Canada - each with exports above 2.5 M mt.

Bulgaria is not a major barley producer by EU standards, but barley margin might be one of the highest in 2026/27 season. Bulgaria's grain sector is still dominated by wheat. Barley area is usually below 200 K ha. Bulgarian barley production was 1.0-1.1 M mt in the last two seasons.



Source: Ministry of Agriculture and Food of Bulgaria; UkrAgroConsult

The 2026 spring barley area was record high of more than 7.4 K ha. This is still small in absolute terms, but clearly demonstrates the trend of increasing barley areas in attempt to let margin higher.

- Wheat market is oversupplied. High export competition, low domestic prices and large carryover stocks made wheat less attractive.
- EU barley exports were active and supported stronger barley prices compared with wheat (2024-2026).
- The Hormuz crisis and fertilizer prices makes farmers switch to lower-cost crops.

Malting barley with feed usage

According to Bulgaria’s Ministry of Agriculture and Food, almost 80% of the barley crop is of malting quality. But in practice, most barley is sold as feed due to limited domestic malting demand. Bulgaria’s brewing sector can absorb no more than 100 K mt of malting barley per year.

Bulgaria. Barley used for brewing and animal feed, K mt



Source: Ministry of Agriculture and Food of Bulgaria; UkrAgroConsult

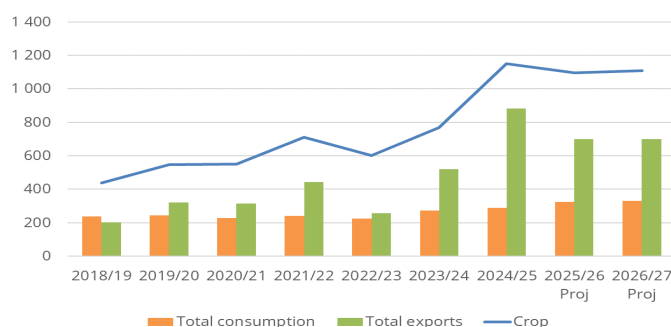
Barley harvest in Bulgaria is expected to start after June, 20, a bit later y/y. The main risk is wet weather. Rains continued in recent weeks. If they continue, harvest may be delayed and barley could compete for machinery and logistics with wheat and rapeseed.

There is also a risk of lodging in some fields. However, yield potential is reported at 6.0-7.0 mt/ha in selected fields. But final quality will depend on weather in the final pre-harvest window.

Bulgaria as barley exporter

Low domestic consumption makes Bulgaria a naturally export-oriented. In recent seasons, Bulgaria has been able to export more than 700 K mt of barley per season.

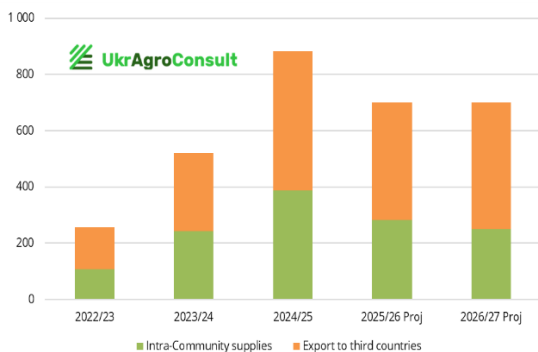
Bulgaria. Barley production, consumption, and exports, K mt



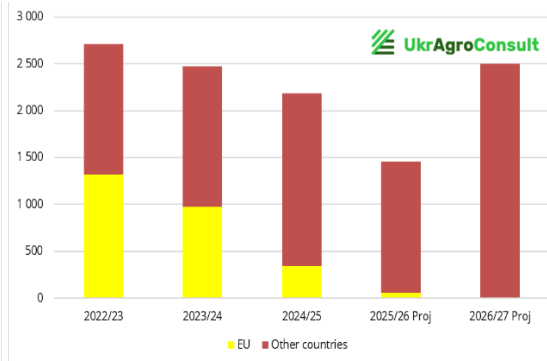
Source: Ministry of Agriculture and Food of Bulgaria; UkrAgroConsult

This is around 10% of total EU barley exports projected at 7.4 M mt. Compared with Ukraine’s forecast exports of 2.4 M mt, Bulgarian exports equal roughly 30% of Ukrainian shipments. Bulgaria may not be a global barley giant, but it is large enough to compete seriously with Ukraine on several destinations.

Bulgaria. Barley exports, K mt



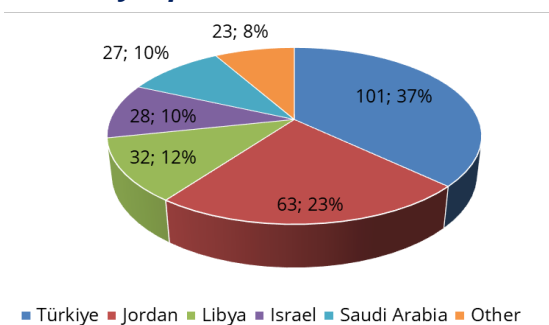
Ukraine. Barley exports, K mt



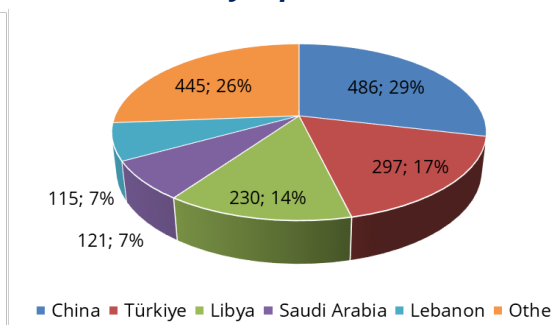
Source: UkrAgroConsult

Bulgaria geographic advantage is clear in the EU market with top importers Greece and Spain. Ukraine did not export barley to the EU over the last two seasons. The direct competition between Bulgaria and Ukraine is mainly outside the EU.

Bulgaria. Barley exports to third countries, K mt



Ukraine. Barley exports to third countries, K mt

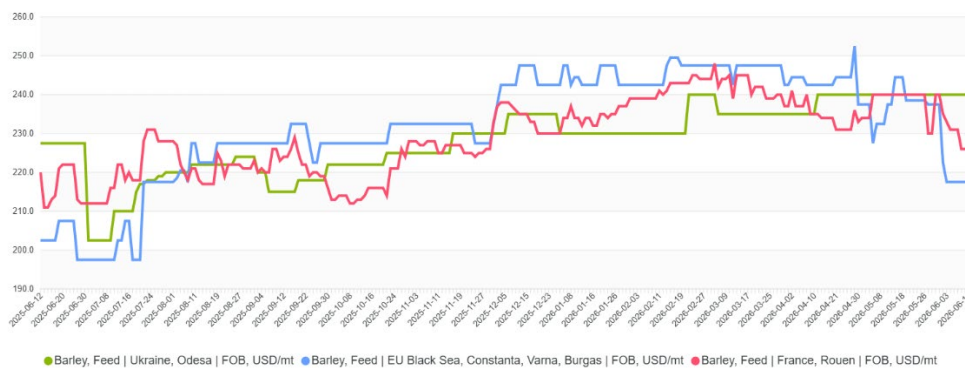


Source: UkrAgroConsult

Turkey is the key overlapping market. In 2025/26, Bulgaria supplied more than 100 K mt of barley to Turkey, equal to roughly one-third of Ukraine's shipments of around 300 K mt. Other shared destinations include Libya, Lebanon, and Saudi Arabia.

Highly likely, Bulgaria intends to export barley to the same destinations where Ukraine is trying to expand its share.

Black Sea-Danube-Balkan trend



Source: UkrAgroConsult database AgriSupp

Russia, Ukraine, Romania and Bulgaria all compete aggressively in the same wheat import markets. Bulgaria cannot rely only on wheat.

Barley gives smaller exporters more flexibility. Bulgarian barley can strengthen position as a second export crop after wheat. If the country consistently exports close to or above 1.0 M mt per season, importers will begin treating Bulgaria as a stable barley supplier rather than an occasional origin.

Tetyana Shevel
Grain and oilseed market analyst
UkrAgroConsult

DISCLAIMER

Information in UkrAgroConsult's reports and market studies was obtained from commercial, government and statistical organizations, which we believe to be reliable. UkrAgroConsult does not guarantee that this information is accurate or complete, nor certifies in any way its reliability. The analysis, opinions expressed and conclusions obtained are valid only within the assumptions set forth in UkrAgroConsult's reports and market studies, reflect our unbiased point of view at the time of preparing the reports and market studies, and are subject to change without notice.

UkrAgroConsult's reports and market studies are intended for information purposes only. UkrAgroConsult hopes that the customer considers this information useful for their business purposes. However, by accepting this disclaimer, the customer agrees that he or she should not rely solely on this information when making business decisions.

UkrAgroConsult will not be responsible for the consequences of the customer's activities or inaction, nor for the consequences of economic or political changes.



**We counsel
business that
feeds the world**

 **UkrAgroConsult**

 **UkrAgroConsult**

+38 044 364 55 85

+38 050 786 13 10 (WA, Viber, Telegram)

uac-info@ukragroconsult.org

www.ukragroconsult.com

