Issued: 26 May 2025
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European Commission

JRC MARS Bulletin

Crop monitoring in Europe

May 2025

Fair EU yield expectations despite concerns

Extended analysis on the Maghreb region included

Spring 2025 has been marked by a severe rainfall deficit in north-western Europe, with the Benelux countries, northern France, Germany, western and southern Poland, and Sweden experiencing one of the driest springs on record. This has raised concerns about crop yield expectations, particularly for winter and spring crops, while actual impacts have been observed locally only so far.

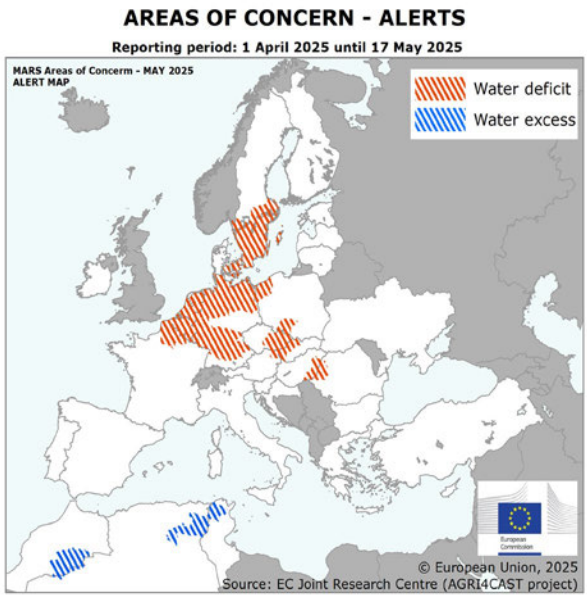
Meanwhile, the Iberian Peninsula, Italy, and Greece have benefited from abundant rainfall, resulting in positive yield expectations, particularly in Spain and Portugal, where yields are forecast to be 15-20 % above the five-year average. Adequate rainfall allowed lifting the concerns raised for Bulgaria and Romania in the April bulletin.

Sowings for grain maize, soybean, and spring barley are largely complete across Europe, even if initially delayed in Portugal and northern Spain due to excessive rainfall.

Actual impacts leading to below-average yield expectations for eastern Ukraine, Türkiye, western Maghreb and Cyprus.

Contents:

Covers the period from 1 April until 17 May



Crop	Yield t/ha				
	Avg 5yrs	April Bulletin	MARS 2025 forecasts	%25/5yrs	% Diff April
Total cereals	5.40	5.65	**5.67**	+ 5	+ 0
Total wheat	5.55	5.82	**5.83**	+ 5	+ 0
Soft wheat	5.77	6.03	**6.04**	+ 5	+ 0
Durum wheat	3.43	3.69	**3.77**	+ 10	+ 2
Total barley	4.76	5.08	**5.14**	+ 8	+ 1
Spring barley	4.66	4.87	**4.86**	+ 4	- 0
Winter barley	4.81	5.18	**5.28**	+ 10	+ 2
Grain maize	7.09	7.45	**7.45**	+ 5	+ 0
Rye	4.22	4.29	**4.19**	- 1	- 2
Triticale	4.37	4.51	**4.45**	+ 2	- 1
Rape and turnip rape	3.16	3.20	**3.17**	+ 0	- 1
Potatoes	36.4	37.3	**37.4**	+ 3	+ 0
Sugar beet	73.6	77.6	**77.9**	+ 6	+ 0
Sunflower	2.02	2.09	**2.09**	+ 4	+ 0
Soybeans	2.67	2.83	**2.82**	+ 6	- 0
Field beans	2.77	2.83	**2.83**	+ 2	+ 0
Field peas	2.22	2.30	**2.33**	+ 5	+ 1

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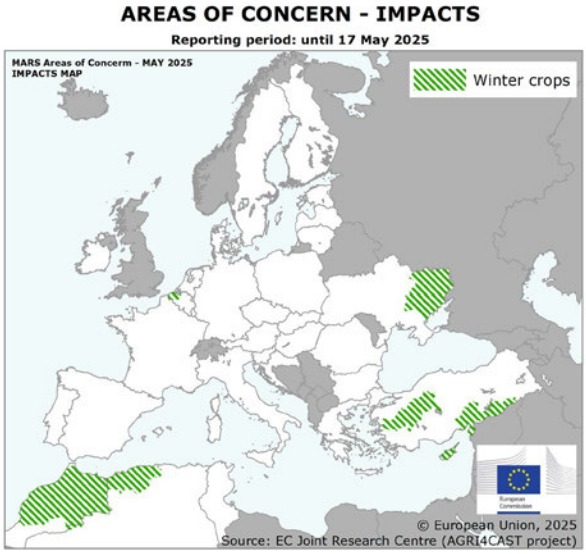
Joint Research Centre

Areas of concern

Farmers are facing a very dry spring in north-western Europe, raising concerns about yield losses. The actual impact on crops has so far been limited, but great attention is required in the coming weeks.



Severe water deficit in north-western Europe challenges farmers and puts crop yields at risk

In the Benelux countries, northern France, Germany, western Poland and Sweden, the spring of 2025 was one of the driest in our records (since 1991), with most regions receiving only 0–50 % of the normal precipitation for the period analysed. Winter and spring crops are still in fair condition due to moderate temperatures; nevertheless, the first signs of drought impacts are becoming apparent, particularly as winter crops approach flowering. Where possible, farmers are irrigating crops, but winter and spring crops are likely to continue to suffer from limited rainfall and above-average temperatures, forecast for the coming weeks. In contrast, summer crops are less affected by the dry conditions, as their water demand is still relatively low, and field operations have benefited from the dry period. In Belgium, the western regions (*West-Vlaanderen* and *Oost-Vlaanderen*) are the most affected, and the impacts of drought are already visible. In Germany, negative impacts on crops have not yet been significant; however, they are likely to become more apparent in the coming weeks, which are projected to bring only limited precipitation, mostly in the north.

Dry weather causes concern in central and eastern Europe

There are concerns about dry weather in central (Poland, Czechia, Slovakia) and south-eastern Europe (Romania), although the rainfall deficit is less severe than in northern-western Europe, and substantial rain is forecast (Romania).

Early end to winter season in Cyprus: low yield expectations ahead

In Cyprus, the winter season has ended earlier than usual due to limited availability of water for crops in an already below-average growing season, resulting in lower-than-average yield expectations.

Excessive moisture and pest pressure cause concern in Tunisia

Minor concerns associated with overly wet conditions and pest pressure have been observed in Tunisia.

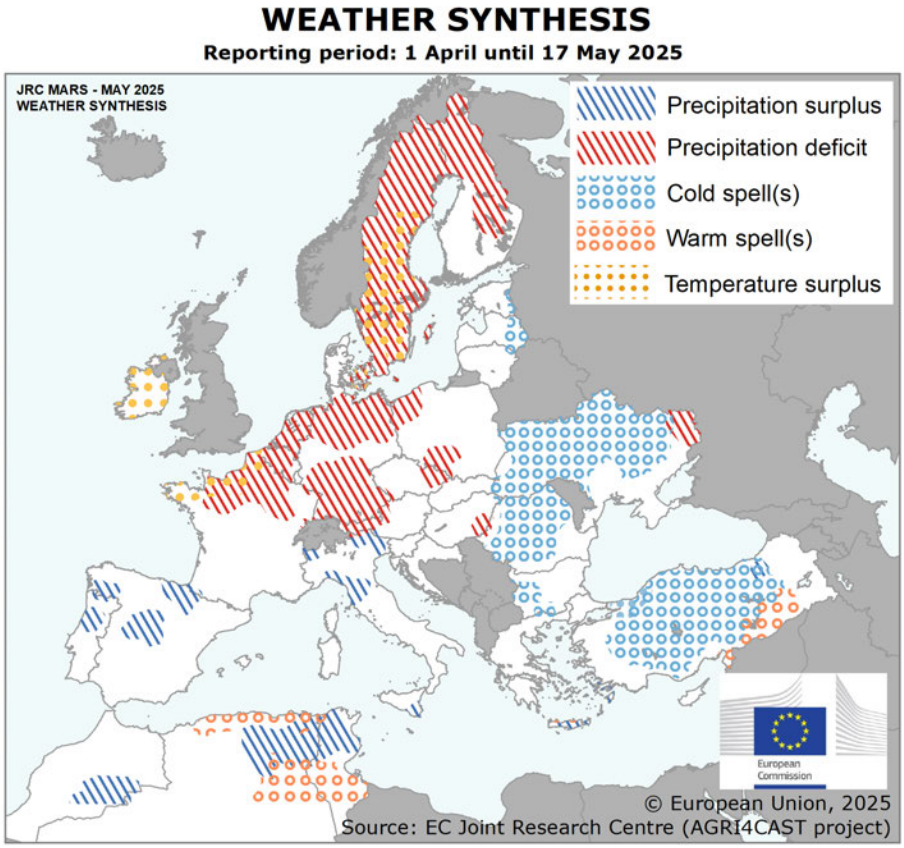
Below-average yield expectations in drought-stricken regions (eastern Ukraine, Türkiye and western Maghreb)

The impacts observed in eastern Ukraine, Türkiye and western Maghreb are attributed to a dry winter and/or spring period, resulting in unfavourable growing conditions for winter crops. Consequently, the yield expectations in those regions are below the five-year average.

1. Agrometeorological overview

1.1 Meteorological review (1 April –17 May)

While it was wetter than usual in the south and south-west, drier-than-usual conditions prevailed in northern, western and central Europe, with colder-than-usual conditions in the east and south-east.



The weather synthesis map summarises, for the countries covered in the bulletin, the most distinct anomalies during the reporting period compared with the 1991–2024 long-term average (LTA) for the same period. Precipitation deficit and surplus are absolute and relative deviations from the LTA. Cold and warm spells are periods of at least five days with temperatures below the 10th and above the 90th percentile, respectively. Temperature surplus corresponds to regions where average daily temperatures rank among the highest in our records since 1991.

A **precipitation deficit** was observed in most of northern Europe, from northern France to north-west Poland, most of central Europe and easternmost Ukraine. These regions were characterised by rainfall between 50 % and 100 % below the LTA. In central and southern Sweden and northern France, the precipitation deficit was accompanied by a **temperature surplus**, which was also observed in Ireland.

In south-eastern Türkiye, southern Tunisia and north-eastern and coastal regions of Algeria, **warm spells** were observed. In most other regions of Türkiye, western Bulgaria, and most of Romania and Ukraine, along with easternmost Latvia and Estonia, **cold spells** occurred in mid April (and in some regions in early May), when minimum daily temperatures in agricultural areas fell on a few days to below zero (in some areas as low as – 10 °C). Considering the entire reporting period, average daily temperatures were slightly below average (up to 2 °C below the LTA) in most regions from Scandinavia and northern European Russia south to the Black Sea region.

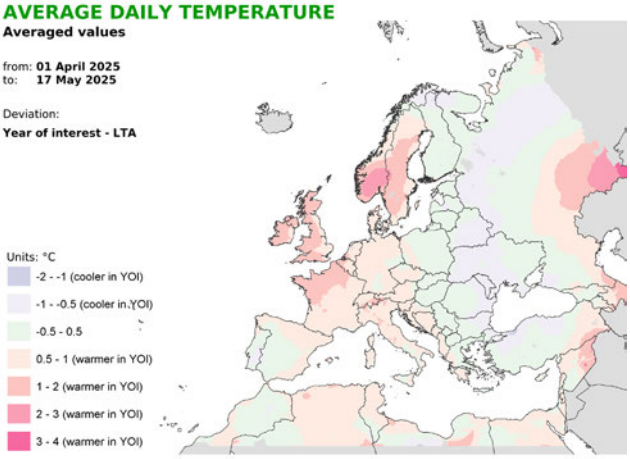
A **precipitation surplus** characterised northern Portugal and Spain, northern Italy, parts of Morocco and north-eastern Algeria and northern Tunisia, and there were surpluses locally in southern Europe (southernmost *Sicilia*, *Kriti* and eastern Türkiye). In some of these regions, cumulative rainfall was up to 100 % and even 150 % above the LTA, with up to 15 days (locally more) above the LTA with rainfall above the 5-mm threshold.

AVERAGE DAILY TEMPERATURE

Averaged values

from: **01 April 2025**
to: **17 May 2025**

Deviation:
Year of interest - LTA

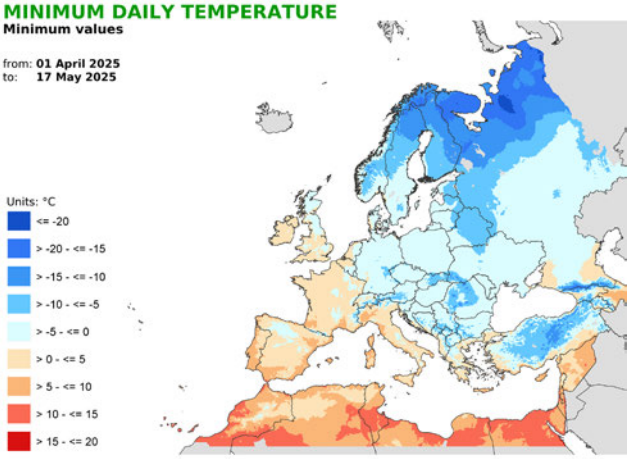


19/05/2025
Resolution: 10 x 10 km

MINIMUM DAILY TEMPERATURE

Minimum values

from: **01 April 2025**
to: **17 May 2025**

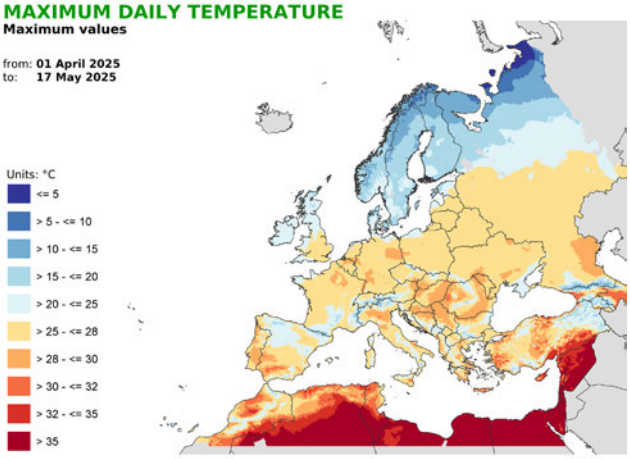


19/05/2025
Resolution: 10 x 10 km

MAXIMUM DAILY TEMPERATURE

Maximum values

from: **01 April 2025**
to: **17 May 2025**



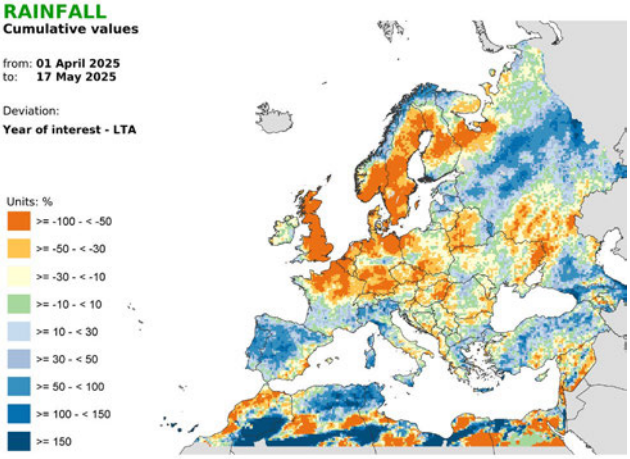
19/05/2025
Resolution: 10 x 10 km

RAINFALL

Cumulative values

from: **01 April 2025**
to: **17 May 2025**

Deviation:
Year of interest - LTA

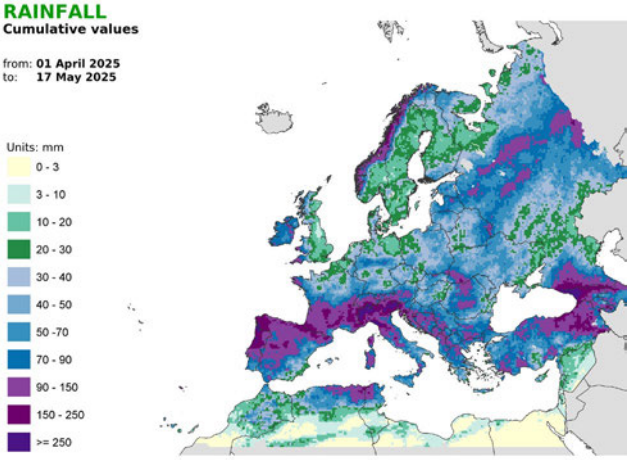


19/05/2025
Resolution: 10 x 10 km

RAINFALL

Cumulative values

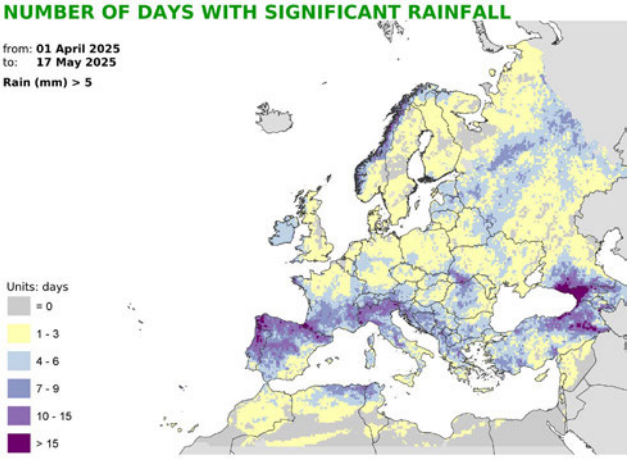
from: **01 April 2025**
to: **17 May 2025**



22/05/2025
Resolution: 10 x 10 km

NUMBER OF DAYS WITH SIGNIFICANT RAINFALL

from: **01 April 2025**
to: **17 May 2025**
Rain (mm) > 5



19/05/2025
Resolution: 10 x 10 km

1.2 Weather forecast (21-30 May)

Colder-than-usual conditions are forecast for most of Europe, while warmer-than-usual conditions are predicted for the south to the Black Sea region. A low-pressure system will bring rainfall to eastern and south-eastern regions in particular.

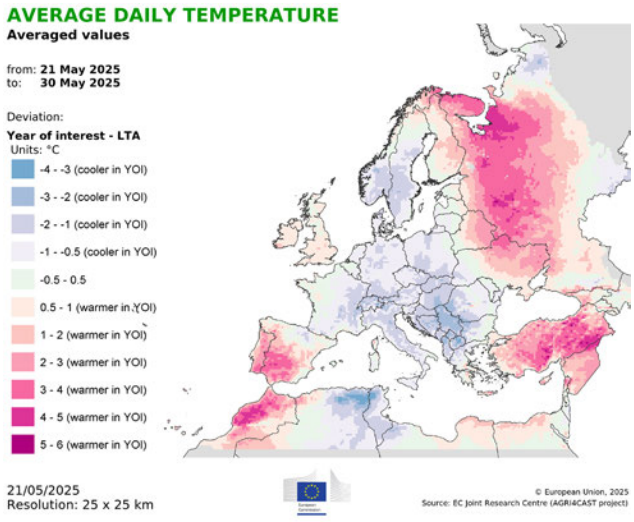
Colder-than-usual conditions are forecast for most of Europe, from Scandinavia to the North African countries. The most substantial negative anomalies are forecast for the western Balkans (up to 3 °C below the LTA) and in north-eastern Algeria and northern Tunisia (up to 4 °C below the LTA). Negative minimum daily temperatures (down to – 10 °C) are forecast only for the Alps, most of Norway, northern Sweden, Finland and European Russia.

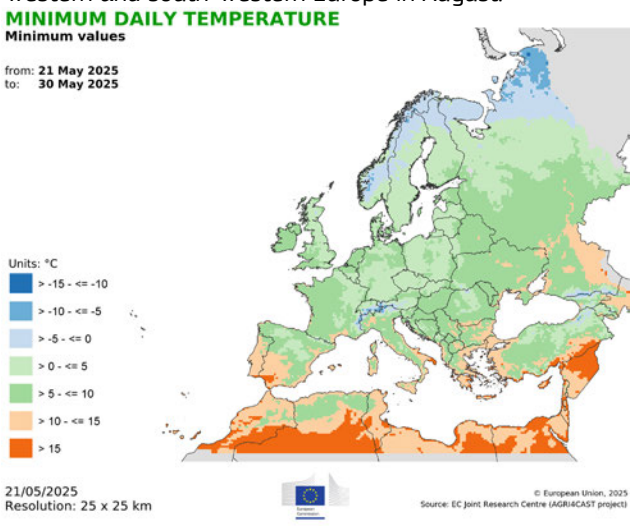
Warmer-than-usual conditions, with average daily temperatures up to 3 °C above the LTA, are forecast for the south-western Iberian peninsula and Morocco, and most of European Russia, north-eastern Ukraine and Türkiye. More substantial positive temperature anomalies (up to 6 °C above the LTA) are forecast for Morocco, south-western Spain, and southern/south-eastern Türkiye, and for a region from northernmost Ukraine to the Barents Sea in European Russia.

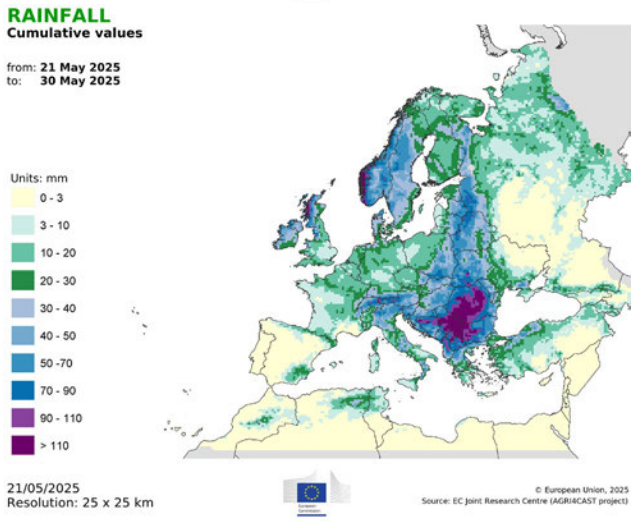
Wet conditions (precipitation of 30 mm and up to 70 mm) are forecast for Ireland, parts of Scandinavia, and the Baltic Sea countries, Denmark and northern Germany, as well as for northern Italy, Austria and across the Balkan peninsula. **Very wet conditions** (above 70 mm) are forecast for most of Romania, Bulgaria and Serbia, where seven to nine days of rainfall above 5 mm are forecast.

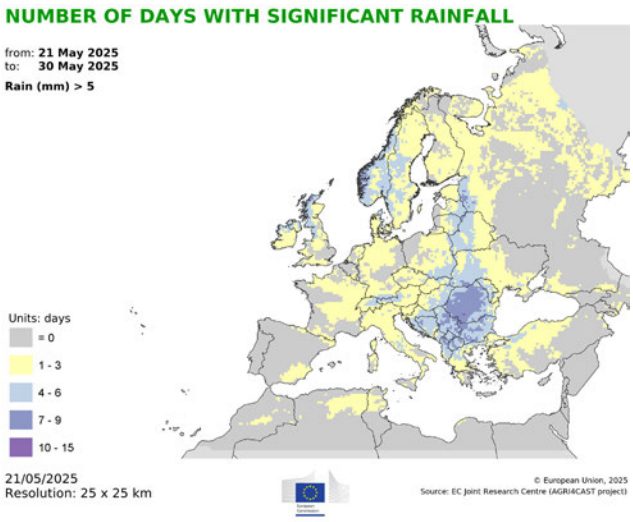
Dry conditions (total precipitation below 3 mm) are forecast for most of the Iberian peninsula, southern France and parts of Maghreb, as well as north-eastern regions of Ukraine, and southern Türkiye.

The **long-range weather forecast** points to a moderate likelihood of warm conditions, exceeding the 24-year climatological median by up to 2 °C in most of Europe in June–July and by up to 1 °C in August. Albeit with high uncertainty, up to 50 mm of precipitation (below-average) is forecast for most of Europe in June–July and for western and south-western Europe in August.





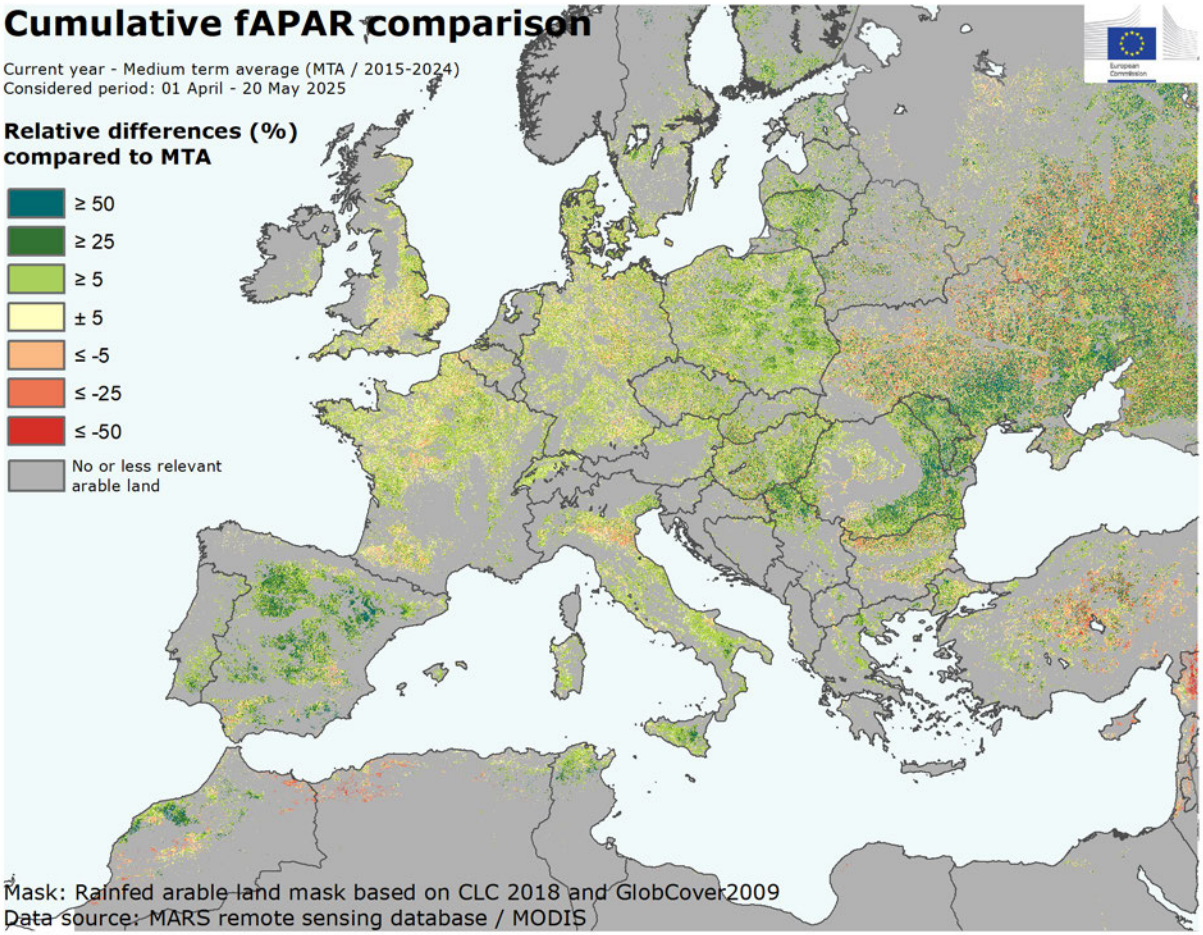




2. Remote sensing analysis

2.1 Arable land

Strong recovery in vegetation conditions across Europe.



The map displays the relative differences (in percentages) between the cumulative fraction of absorbed photosynthetically active radiation (fAPAR) from 1 April to 20 May 2025 and the medium-term average (MTA, 2015–2024) for the same period. Positive anomalies (in green) reflect above-average crop biomass, while negative anomalies (in red) reflect below-average biomass or late crop development.

The map above shows predominantly winter crop conditions, as the summer crop season has just begun and has made a minimal contribution to fAPAR levels. Remote sensing indicators show a strong recovery and improvement in vegetation conditions across Europe compared with the previous month. Whereas the signal was predominantly negative in western Europe in April, a marked improvement has been observed in early May.

In the **Iberian peninsula**, vegetation conditions have significantly improved, with crops responding positively to abundant rainfall. fAPAR values are approaching record-high levels for this time of year, indicating strong biomass accumulation.

In southern **Italy** and **Greece**, the vegetation signal is also strongly positive, supported by abundant and well-distributed rainfall in April. In northern Italy, vegetation development is slightly above the MTA, benefiting from consistently above-average rainfall since mid March; crops developing well under stable conditions.

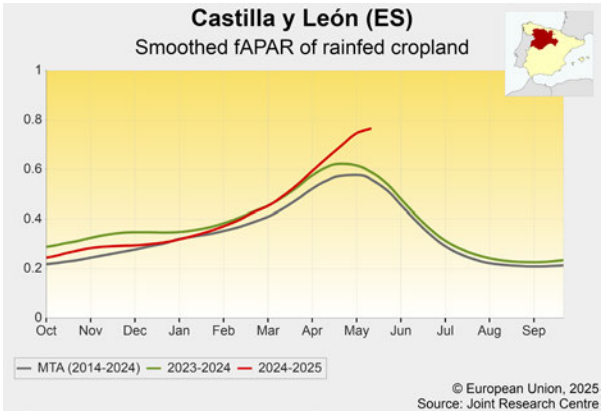
In large parts of western Europe, including northern **France**, most of **Germany,** the **Benelux** countries, and in **Czechia**, fAPAR values rose above the average but are likely to be adjusted with the observations of the next dekad due to the prolonged dry period. Despite rainfall deficits observed over the past two months, there is no visible impact yet on crops, which have benefited from warm days and cool nights, while soil moisture has dropped to very low levels.

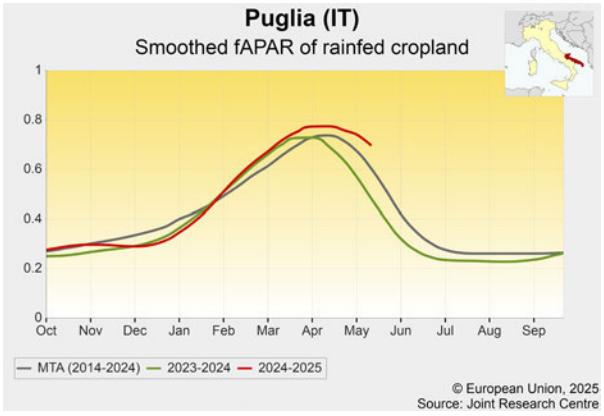
In northern **Germany**, **Denmark**, **Sweden** and most of **Poland**, satellite observations indicate an early development of winter crops, nearly two dekads ahead of the typical phenological schedule. A similar pattern is observed in the **Baltic countries**, driven by warmer-than-usual temperatures during March and April.

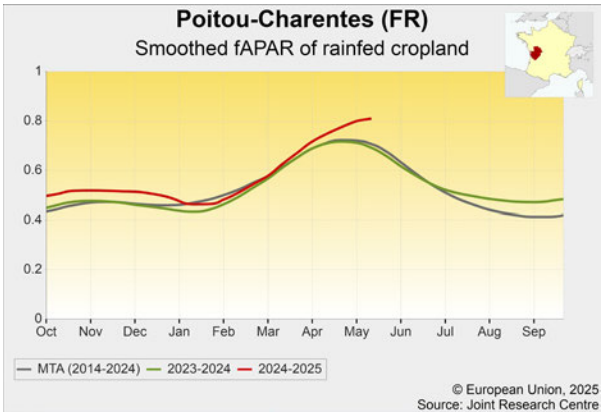
In central Europe, particularly in **Slovakia**, **Hungary** and western **Romania**, biomass accumulation is above average. This is attributed to the early onset of spring and the well-distributed rainfall since mid March, which supported strong vegetation development.

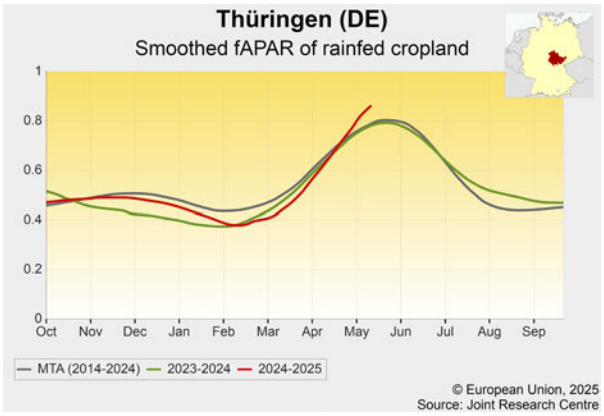
In the Black Sea region, including eastern **Romania**, **Bulgaria** and southern **Ukraine**, the signal points to an early vegetation season with an overall positive development trend, despite rainfall deficits persisting in most areas since March. In central and western Ukraine, the signal remains close to average.

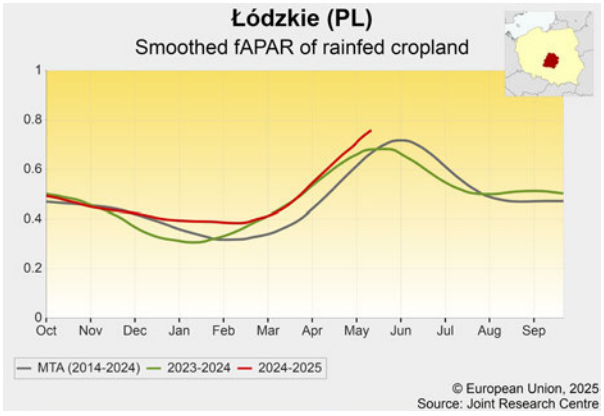
In Türkiye, the fAPAR signal remains close to normal, with no significant anomalies observed.

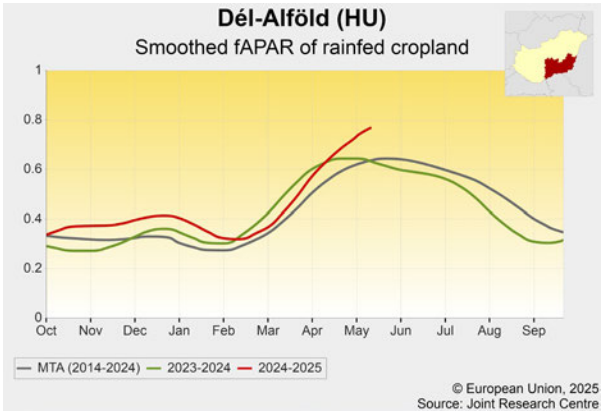


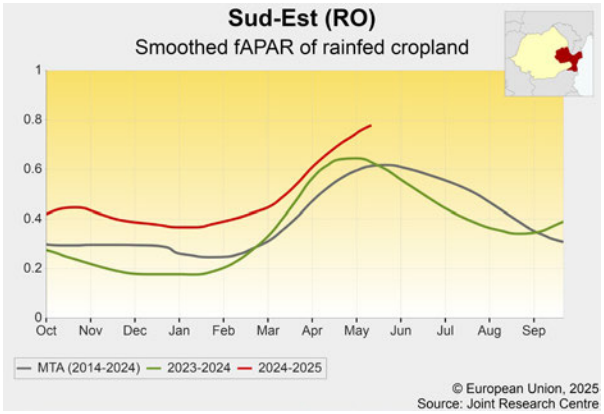


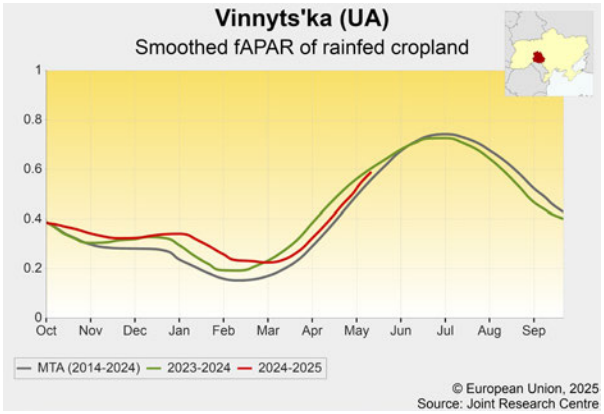






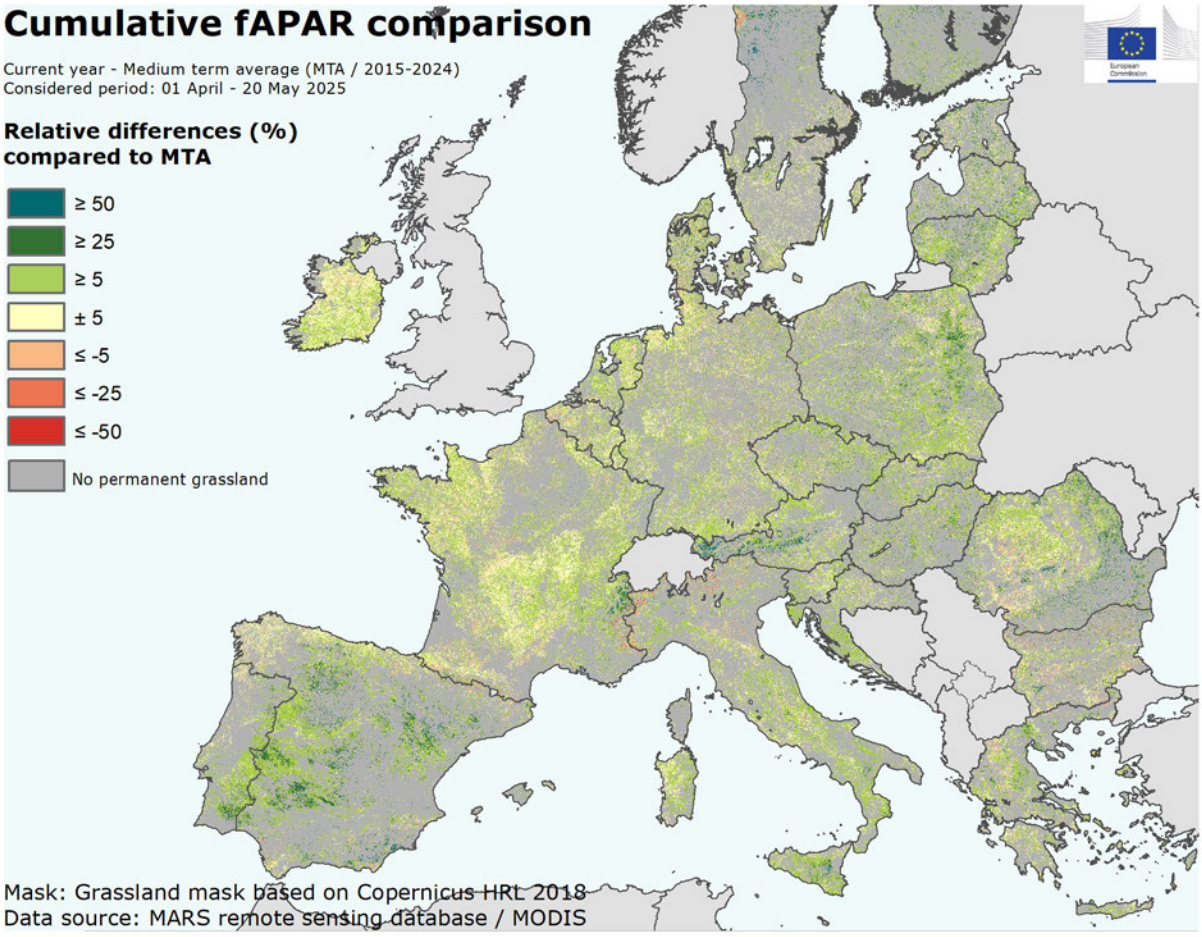






2.2 Grasslands and fodder

The satellite signal suggests grassland developments close to or above the average across Europe, resulting from excellent growing conditions in the past weeks. However, rain is needed in the Nordic countries, Germany, Benelux and parts of France to sustain a positive outlook.



In **Ireland**, grasslands are in optimal condition, with growth sustained by warm temperatures and adequate rainfall. In the **Benelux** countries, **Germany** and northern **France**, the fAPAR signal is in line with or above the average, reflecting good growing conditions and actual growth over the past two months. However, the current rainfall deficit is starting to stress grasslands, and more rain is needed soon to sustain the positive growth trajectory. In southern **France**, precipitation levels have been sufficient to maintain the signal above the MTA. In

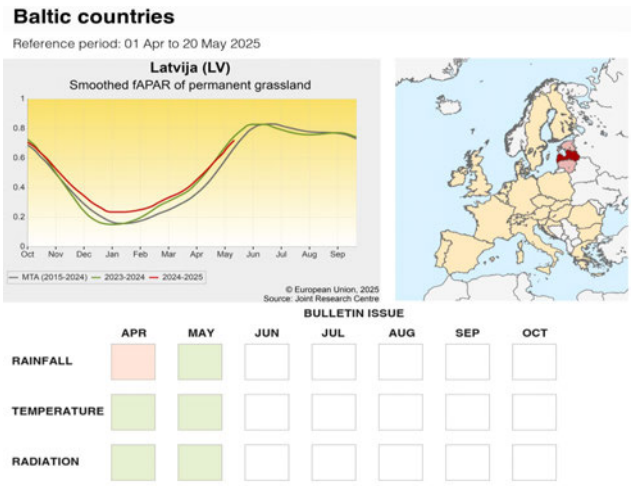
Poland, the biomass accumulation remains above the MTA, and the rainfall deficit has not yet negatively affected grasslands.

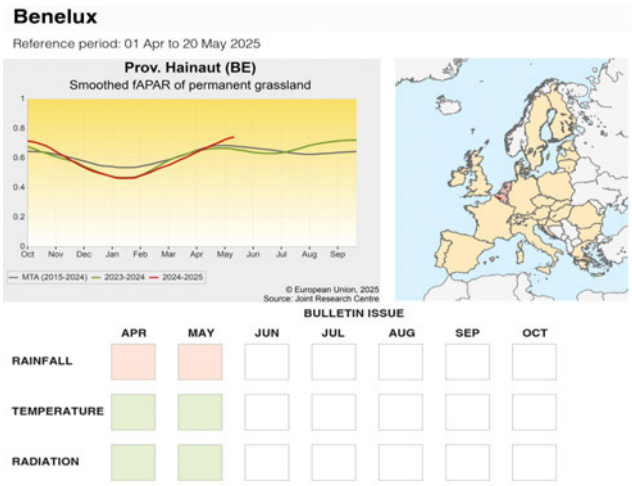
In **Denmark** and **Sweden**, the signal is close to or above the MTA, indicating overall good grassland development, despite a rainfall-deficit-induced slower biomass accumulation rate in some regions. In **Finland**, grassland development remains above average except for southern regions, where it is now close to the MTA. In the **Baltic countries**, grasslands are in good condition except for the south-eastern regions of **Lithuania**, where the growth rate has locally reduced due to the combination of drier- and warmer-than-usual conditions.

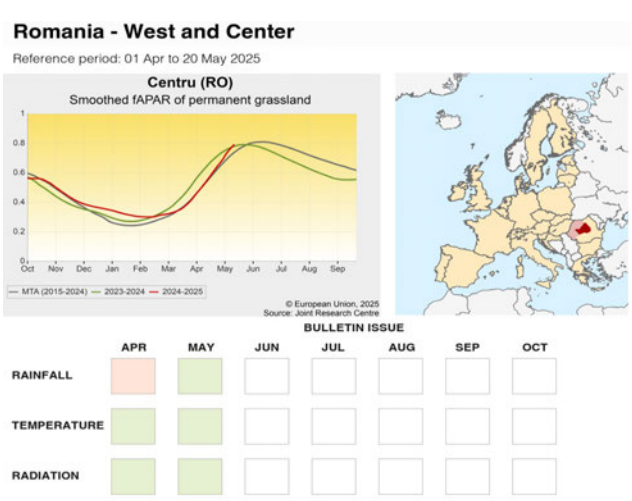
In **Czechia** and **Slovakia**, biomass levels are above the MTA, thanks to adequate soil moisture and warmer-than-usual temperatures. In **Austria**, grassland has made up the delay, and biomass has returned to normal or above-average levels, but, with rising temperatures, more rain is needed in the west. In **Hungary** and southern and eastern **Romania**, biomass levels are largely above average, but more rain is needed soon to sustain the positive growth.

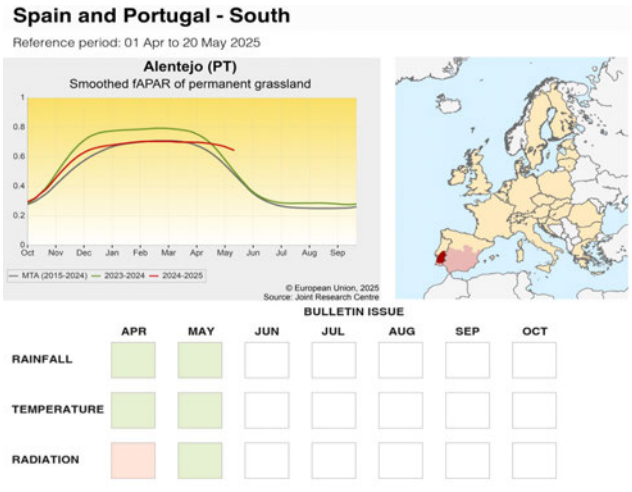
In other regions of **Romania**, productivity has improved compared with April and is mostly also largely above normal and sustained by near-seasonal rainfall levels. In **Bulgaria**, recent precipitation has improved the water supply of grassland, and the fAPAR signal is above the MTA.

In **Croatia** and **Slovenia**, grassland has developed positively, as the warmer-than-usual temperatures were supported by several precipitation episodes. In **Greece**, the signal remains close to or above average, thanks to adequate rainfall and gradually warmer conditions. In northern **Italy**, a slight radiation deficit has locally hampered growth, but the season remains positive. Winter fodder crops have developed well, while green maize planting has started. In southern **Italy**, rainfall sustained the early development of grasslands, led by overall positive thermal anomalies. In **Spain** and **Portugal**, the outlook is promising, with the fAPAR signal largely above average throughout the Iberian peninsula.









3. Sowing progress

Sunflower – delayed sowing campaign in eastern and southern Europe

In **Bulgaria**, **Croatia, Hungary, Slovakia** and **Romania**, the sowing campaign started late due to cold weather and wet topsoils in the first half of April. Sowing accelerated after mid April and is now close to conclusion. However, shorter cold spells in late April and mid May delayed emergence and slowed down early development. Low soil moisture conditions are problematic in south-eastern Romania, northern Bulgaria and eastern Hungary. In **France**, the sowing campaign concluded on time, and overall crop conditions are good, with favourable rainfall patterns and temperatures in southern and western regions. In **Germany**, sunflower is mostly cultivated in the south, where the rainfall deficit is limited, although here too soil moisture is depleting fast. The sowing campaign should be finished by and large.

In the **Iberian peninsula**, sowing was completed in the south (*Andalucía*) in the second half of April with a delay of a few days, following a pause caused by the heavy rains recorded in March. Depending on the planting date, fields range from areas where inflorescences can already be seen to others where crops are just emerging. In both cases, crop condition is good. In *Castilla y Léon* and *Castilla-La Mancha* regions, sowing began in mid April with some delay caused by abundant rainfall, and has progressed slowly because farmers were unable to access their fields for the same reason. Nevertheless, there is still time to complete planting in a favourable window. Soil moisture levels are adequate for crop establishment and good early development. In **Italy**, sowings proceeded with a delay due to the rainfall in late April and early May. Overall, crop conditions are positive, even though the wet soils could reduce root development, leading to possible problems of accessing deeper soil moisture during summer. In **Greece**, the sowing campaign has been completed across most of the country. Sunflowers are typically in the middle of the vegetative phase now.

In **Ukraine**, sowing is progressing well, but slower than last year due to lower-than-usual temperatures..

Potatoes – sowing campaign near completion

Among the large potato producers, **Germany France** and **Poland** have completed sowing very early this year, with favourable field working and adequate soil moisture conditions prevailing during the process. In the **Netherlands**, sowing is nearly complete, with only a small area remaining to be planted.

In other European countries, the sowing progress varies. **Denmark** and **Austria** have also made significant progress, with sowing almost complete. In contrast, **Spain** and **Portugal** have experienced delays due to frequent rainfall, although sowing has become more widespread in recent weeks. **Romania** is nearing completion, while **Italy** has finished sowing. The situation in **Sweden** and **Finland** is less advanced; sowing is still under way.

Overall, the sowing campaign has been facilitated by favourable weather conditions in many parts of Europe, although some southern countries have faced challenges due to excessive rainfall or dryness. Especially in the Benelux countries, Germany, Poland, Denmark and northern France, the prolonged dryness since mid February, with record-breaking values for some areas, is posing an increasing risk to the emergence and early development of the seedlings. Rain is needed urgently.

Soybean – sowing on time despite some delays

In **Ukraine**, sowing of soybean is almost complete under generally good conditions, but a rainfall deficit in the eastern region may affect crop emergence. In **Italy**, sowings are expected to be concluded within the optimal window despite some delays due to excessive rainfall; weather conditions for early development stages are fine. The overall sown area is expected to be lower than last year. In **France**, overall, sowings are progressing under favourable conditions; sowing activities are expected to be concluded soon, within the optimal window.

In central and eastern Europe, sowing has been delayed due to cold (**Hungary**, **Romania**) or wet (**Croatia**) weather. The optimal sowing window will close by the end of the month, giving enough time to finish the activity despite the current delays. In **Austria**, conditions are slightly more favourable, with sowings almost complete.

In **Germany** and **Poland**, dry weather has favoured the sowing activities, which are almost completed. Rain is needed to sustain the early development stages.

Spring barley – sowing complete across Europe

In **France**, despite favourable sowing conditions and a very positive start to the season, the lack of rainfall in northern regions is becoming a concern. In contrast, crops in southern and western parts of the country have progressed to the heading stage. In the **Benelux** countries and **Germany**, sowing was completed under favourable conditions in April. However, more rainfall is critical, especially in northern Germany and in the Netherlands and Belgium, as low soil moisture and limited rainfall that is forecast, could have a negative impact on emergence. Similarly, in **Denmark** and **Sweden**, spring sowing was completed in record time due to dry and warm conditions. While crops are generally in good condition, the continued absence of water could hamper plant development in some regions.

In **Ireland**, sowing was completed by mid April. Favourable weather has supported rapid growth, with crops already emerged and reaching the tillering phase. In central and eastern Europe (**Austria**, **Czechia**, **Slovakia**, **Poland**, **Hungary** and **Romania**), sowing was also finished in April under suitable conditions.

In the Baltic Sea region (**Lithuania**, **Latvia** and **Estonia**), spring sowing is expected to be complete. Seedlings are generally in good condition due to adequate rainfall and temperatures across most regions. In **Finland**, despite an early start to the season, sowing progress was temporarily slowed by precipitation in some areas. Drier and warmer conditions since the second week of May are expected to support the completion of the remaining sowing activities.

Sugar beet – early sowing thanks to good weather

In western Europe – particularly northern **France**, the **Benelux** countries and, to a lesser extent, **Germany** and **Poland** – dry and sunny weather allowed sugar beet sowing to begin up to three weeks earlier than usual. Favourable conditions prevailed throughout the sowing period, enabling an even earlier completion.

Further east, in countries such as **Czechia**, **Slovakia** and **Romania**, sowing was on schedule. The continued dry weather facilitated rapid progress and, overall, crops are currently in good condition.

However, the ongoing lack of rainfall across almost all the producing Member States, including Nordic countries, raises strong concerns, as adequate soil moisture is essential for successful emergence of the plants.

The sown area across Europe is expected to decrease by between 5 % and 10 % this year, as a consequence of the drop in sugar prices in 2024.

Grain maize – sowing near completion, but lagging behind in the Iberian and Balkan peninsulas

The maize-sowing campaign progressed smoothly in central and northern Europe, benefiting from persistent sunny and dry weather. In **Lithuania** and **Poland**, sowing is complete and the seedlings are in good condition. In **Germany**, the last fields were sown by mid May under mild and dry weather conditions; rainfall is now critical, especially in the north. In the **Netherlands**, sowing is very close to completion. Soil temperature is optimal for emergence and early growth, but rainfall is urgently needed to ensure adequate soil moisture levels. In **Belgium**, most fields have been sown, and early development is progressing well. In **France**, sowing is nearly finished, but soil moisture levels are concerning in the north. In **Austria**, **Czechia** and **Slovakia**, sowing is complete and soil conditions are good.

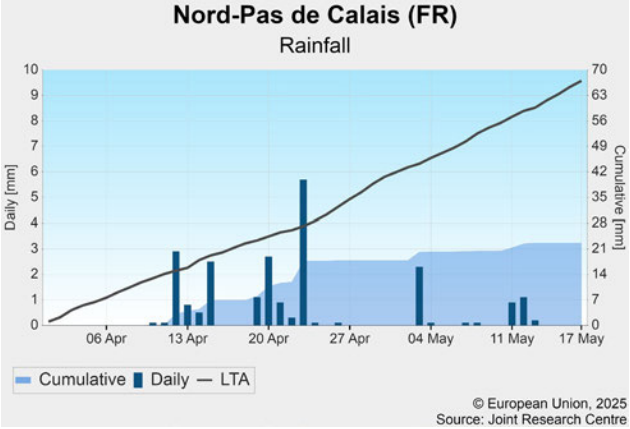
In contrast, in **Portugal** and northern **Spain**, sowing is delayed by up to a month due to abundant rainfall in April, favouring shorter-cycle maize varieties. Large water reserves make supplies for irrigation secure for the next few months. Sowing delays have also been observed locally in **Italy**, but the warmer-than-usual temperatures are facilitating a swift recovery. In the **Balkan region**, the suitable time window for maize sowing has closed, and the campaign is still not fully complete, although well advanced. In **Slovenia** and **Croatia**, sowing started late, following a wet April. Compared with last year, an increase in the maize-sown area is expected in Croatia. Wet and locally cold weather delayed field operations in **Bulgaria** and **Romania**, but sowing eventually took place under suitable soil conditions. Conversely, water supply has been concerning in eastern **Hungary**. Sowing has been completed swiftly in **Greece**, and grain maize is between the early and established vegetative stages. Finally, sowing is approaching completion in **Ukraine**, with the eastern regions experiencing dry soil conditions.

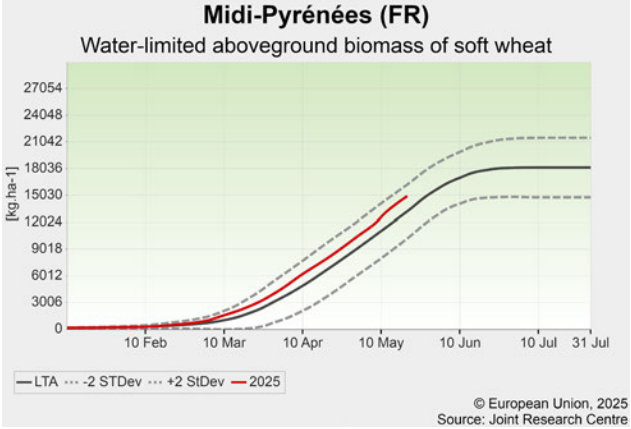
4. Country analysis

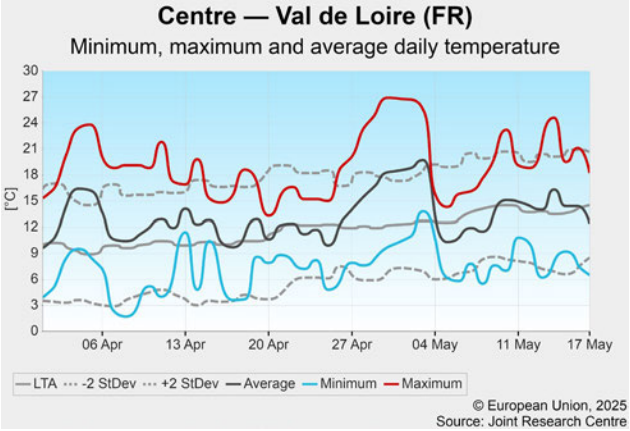
4.1 European Union

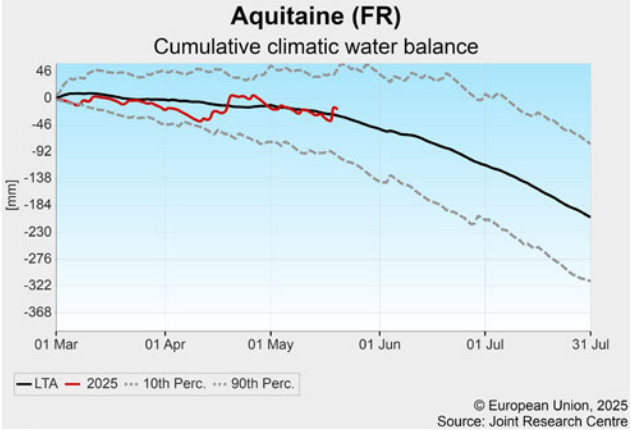
France - severe water deficit in the north, but fair in the south

Below-average rainfall prevailed during the review period in northern France (e.g. *Nord-Pas de Calais*), continuing the dry conditions that had been experienced since February and affecting winter and spring crops. Above-average radiation and near-seasonal temperatures were at least somewhat beneficial. Winter barley reached flowering under critical water stress, which will probably lead to yield reductions. Soft wheat and spring barley had not yet fully entered the reproductive stages; timely rainfall (ideally before the end of May) could still prevent the further deterioration of crop conditions. Low soil moisture levels were also affecting the yield formation of rapeseed. In southern and central France (e.g. *Midi-Pyrénées*), adequate rainfall combined with moderate temperatures supported crop development without any delay. Winter cereals entered the flowering stage generally in good condition. Overall, yield expectations for soft wheat, barley and rapeseed have been revised downwards due to the worsening situation in the north. Conversely, the yield outlook for durum wheat has been adjusted upwards, reflecting the more favourable conditions prevailing in the south.





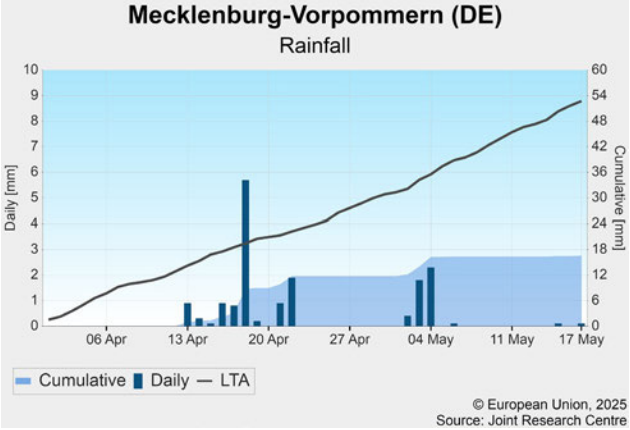


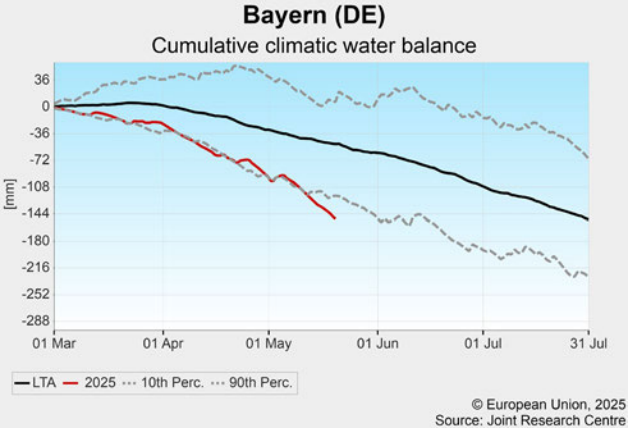


Germany – lack of rainfall lowers soil moisture to critical levels

During the reporting period, the rainfall deficit since February continued to intensify, especially in the north, with only one third of the usual rainfall having arrived. Soil moisture reached critical levels in most of Germany. About 50 mm of rainfall at the end of April, mainly from *Nordrhein-Westfalen* to *Sachsen*, were not enough to adequately restore soil moisture for spring and winter crops, which had been exposed to these conditions. The sowing campaign for summer crops, on the other hand, benefited from cloud-free days and is expected to have reached completion around mid May. Now, however, all crops need additional rainfall to maintain the yield potential. Forecasts until the end of May suggest some minor rainfall, but most of Germany is expected to keep receiving below-average precipitation, which would further deplete the soil water levels.

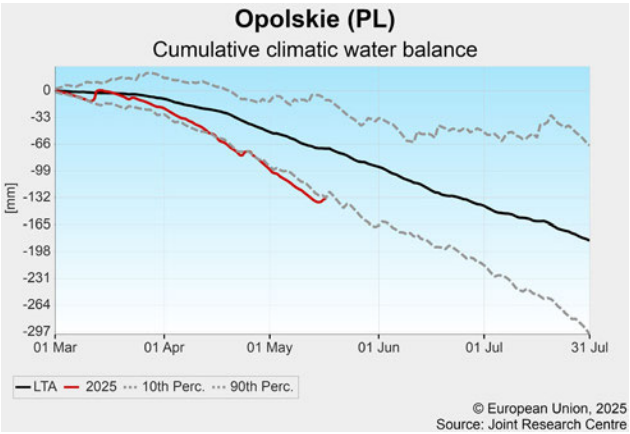
Our summer crop yield forecasts remain on trend, while those for winter crops and spring barley have been slightly lowered by 3 % compared with April to take account of the lack of rainfall.

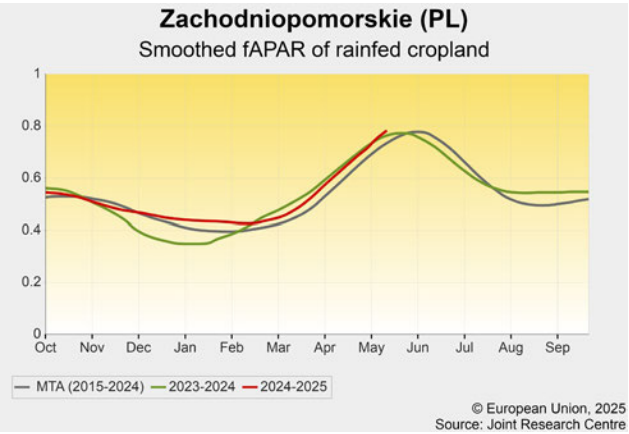




Poland - persistent rainfall deficit has started to impact winter and spring crops

Near-seasonal temperatures across the country supported the already advanced vegetative growth of winter crops during the reporting period and have resulted in above-average biomass accumulation so far, reflecting the advanced crop phenology. However, while the below-average rainfall presented favourable conditions for the timely completion of the spring sowings, it resulted in the further deterioration of soil moisture conditions, especially in the south and the north-west. This deficit is expected to intensify, as only a little rainfall is currently forecast for the coming two weeks, when crops will enter the reproductive stages. This will most likely compromise the further development of winter and spring crops. Hence, our yield forecasts for winter and spring crops have been revised slightly downwards and are currently 1–2 % below the five-year average. Rainfall remains urgently needed in the coming weeks, to prevent a more severe deterioration in crop yield prospects. Summer crop yield forecasts remain in line with the historical trends.



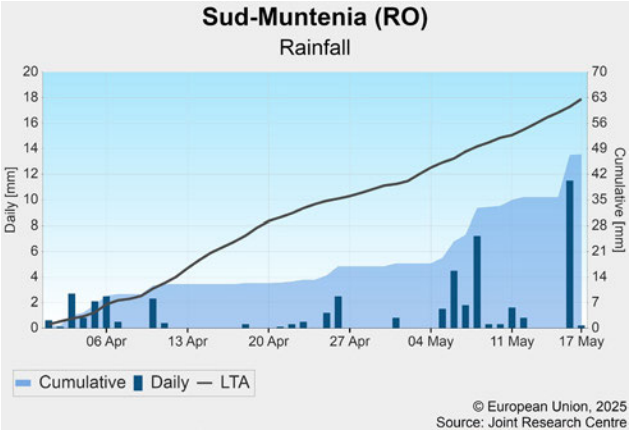


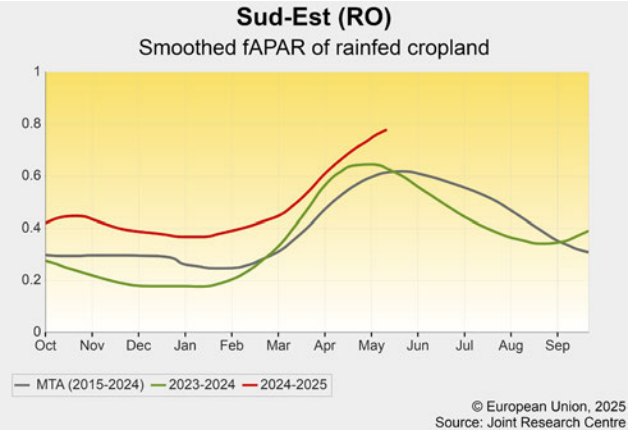
Romania - winter crops fare very well despite cold episodes

Warmer-than-usual weather supported the development of winter crops during the reporting period, although a cold spell around 10 April caused frost damage locally. Rainfall during May increased soil moisture in south-eastern Romania and sustained the good condition of winter crops. This was confirmed by above-average biomass accumulation, as detected by satellite imagery. More precipitation is forecast and is likely to provide adequate water supply during early grain-filling. However, the expected wetter- and colder-than-usual weather could result in increased pest pressure.

Spring sowing was delayed in early April due to cold soils. Later, with increasing temperatures, this delay was made up, and sowing has now concluded. While wet topsoils support crop emergence, early plant growth and canopy expansion, lower-than-average temperatures during mid-May have been slowing down crop development.

Our yield forecasts for winter crops have been further increased and are currently well above the five-year average, while spring and summer crop expectations follow the historical trends.

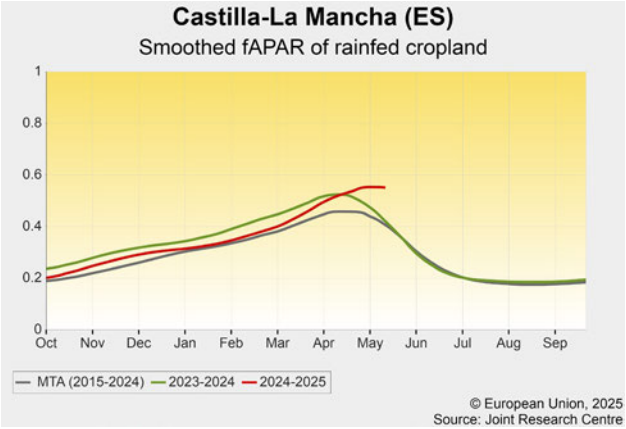


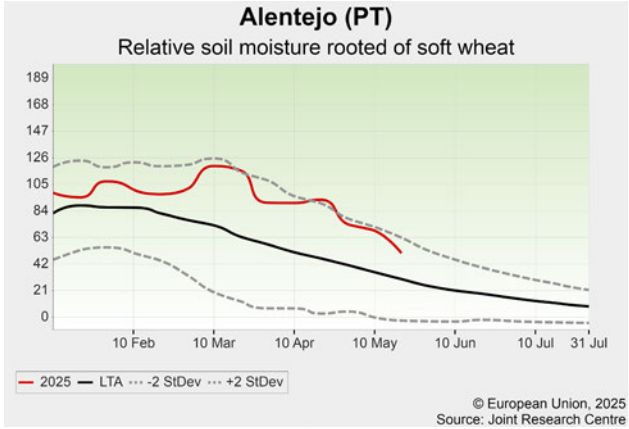


Spain and Portugal - confirmed positive yield outlook

Favourable weather conditions prevailed across the Iberian peninsula. Moderate temperatures and well-distributed rainfall during the reporting period continued to support the proper development of winter cereals and are expected to benefit yields. Biomass indicators derived from both our model simulations and satellite observations confirm the excellent overall crop conditions, aligning with some of the best records of recent years. Nevertheless, the excessive wetness increased disease pressure and raises concerns about crop quality. The impact of local hailstorms in early May is expected to be limited. Our yield forecasts for winter cereals have been revised further upwards for both Spain and Portugal; they are now above last year's levels and 15–20 % above the five-year average.

Sowings of summer crops were generally delayed, but field work accelerated in the second half of April, when field access improved. Adequate soil moisture and rising temperatures are expected to support crop emergence and early development. Our yield outlook remains in line with the historical trends.

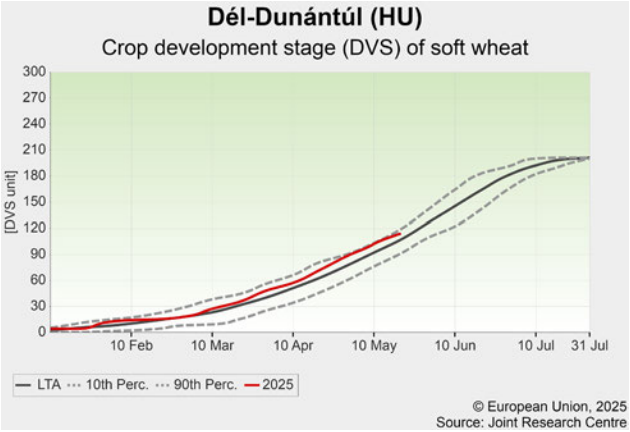


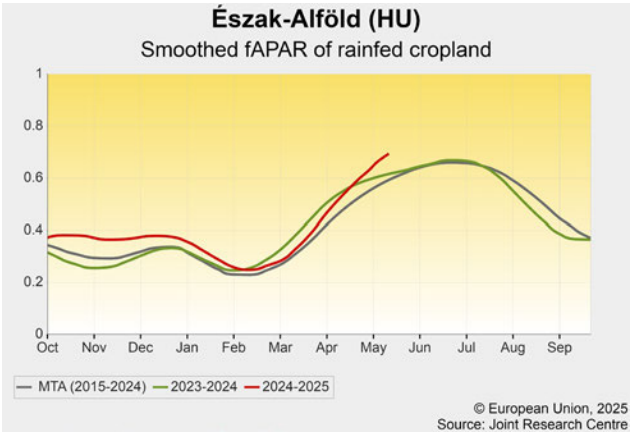


Hungary – winter cereals are in good shape

During the first dekad of April, severe frost events caused damage to flowering rapeseed stands and particularly to stone fruit orchards. The cold spell also delayed the start or progress of spring sowing campaigns (e.g. sunflowers, maize); they accelerated from mid April onwards thanks to increasing temperatures. At the same time, the warm weather unfavourably accelerated and shortened the flowering period of rapeseed.

Biomass accumulation of winter cereals reached above-average levels, due to accelerated phenological development, confirmed by remote sensing imagery. The soil moisture supply of winter cereals is mostly adequate except in the east and south-east, where there is a considerable rainfall deficit. After 5 May, below-average temperatures reduced the crop water requirement, favourably lengthened the grain-filling period and mitigated the negative effects of the rainfall deficit in the east. At the same time, the cold period slowed down the early development of summer crops. Our yield forecasts of winter crops have been slightly revised upwards, while for spring and summer crops they follow the long-term trend.



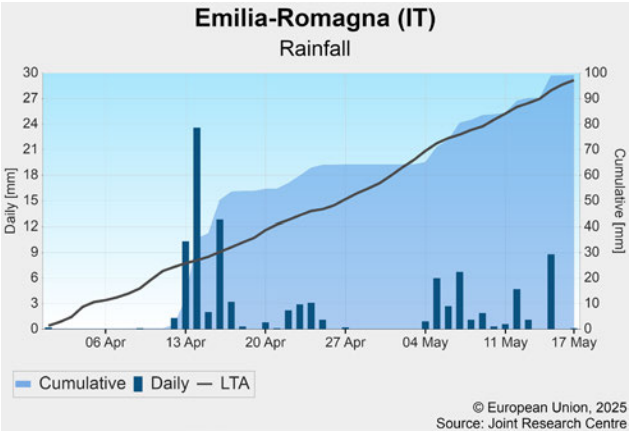


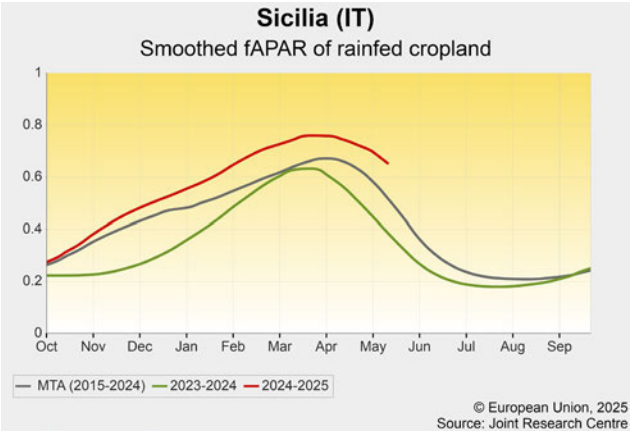
Italy - overall favourable season continues

In northern Italy, winter crops are in good condition, but abundant precipitation has hardly allowed farmers to access fields to conduct cultural operations. Biomass accumulation is, although slightly delayed, around average, except in *Emilia-Romagna*, where the development of winter crops is still very delayed due to the late autumn sowings. The sowing of summer crops is almost complete after minor delays, while crop emergence and the early development is fair.

In central Italy, the warm and wet weather favoured the growth of winter crops, now well advanced (around the flowering phase), with above-average biomass accumulation. In the south, the season is proceeding optimally, notably in *Sicilia*, where durum wheat has developed very well and started the grain-filling phase; high yields are expected. In *Puglia*, despite favourable weather, the dry start to spring reduced yield expectations locally.

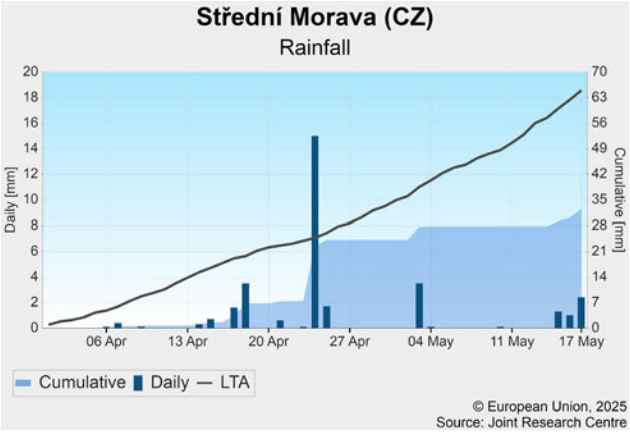
Our yield forecasts for winter cereals remain overall above the five-year average, while our forecast for barely increased by 5 %, thanks to the favourable conditions in central and southern Italy. Yield forecasts for summer crops are still based on trend analyses.

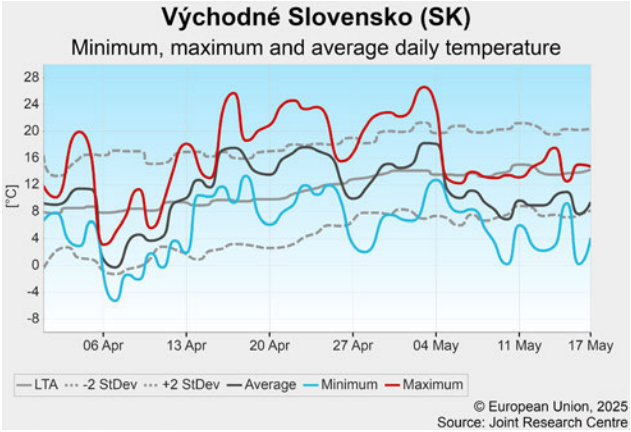




Czechia, Austria and Slovakia- lack of rainfall threatens yield potential

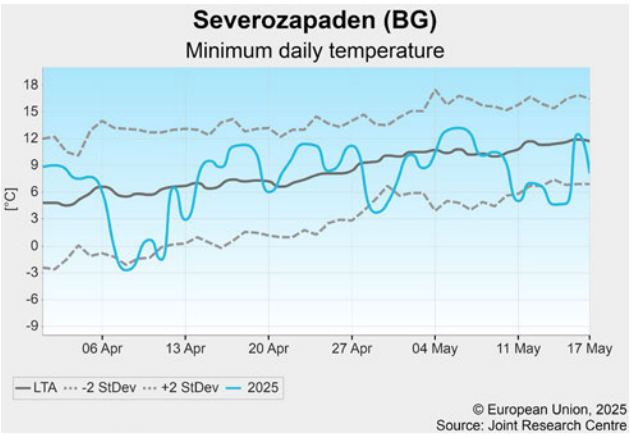
The relatively warm and dry weather in central Europe since March has been beneficial for winter crop development and for the sowing of spring and summer crops, although sowing has been slightly delayed in Slovakia due to low temperatures at the beginning of April. The lack of precipitation since the beginning of the growing season, combined with the warm temperatures, is now becoming a concern both for winter crops and spring/summer crops, especially in eastern Czechia, western Slovakia and north-eastern Austria, where the rainfall during the review period was only half of the LTA. The lack of precipitation is starting to affect the yield potential of winter crops, and substantial rainfall is needed in the short term to restore soil moisture levels. The concern is even stronger for spring crops: they are at the beginning of their growth cycle, when a good water supply is vital for further development. Our winter crop yield forecasts remain in line with the five-year average, except for rapeseed in Slovakia, where some damage occurred due to low temperatures in May (locally down to – 8 °C) and for which our forecast is slightly below the five-year average.

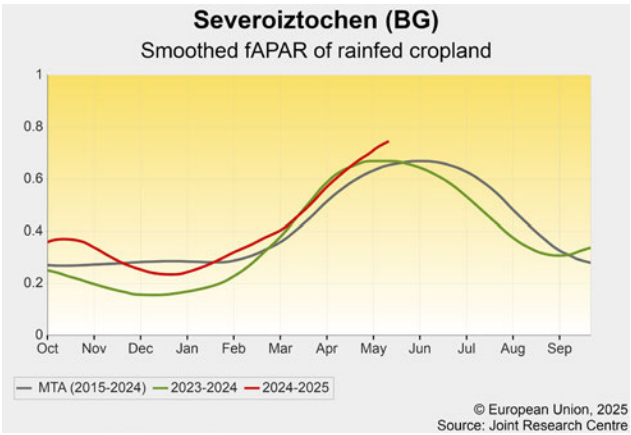




Bulgaria - positive yield outlook for winter crops

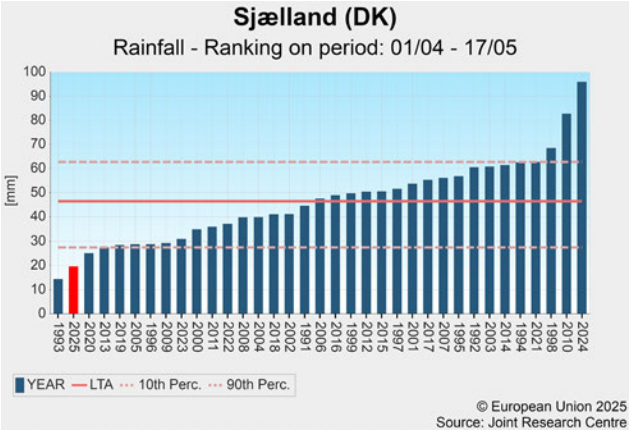
Overall, moderate temperatures and sufficient rainfall provided favourable conditions for winter crops, despite a cold spell in early April and lower-than-usual temperatures around mid May. Weather forecasts point to further improvements in soil moisture levels by the end of May, offering fair conditions for yield formation. Winter crops show above-average biomass accumulation and are advanced in development, as confirmed by our model simulations and remote sensing imagery. This is reflected in the overall good condition of winter crops so far. The spring sowing campaign was initially delayed by the cold spell in early April. Since then, warmer-than-usual temperatures have allowed field work to accelerate to compensate for the delay, although sowing was still completed later than last year. The cold period of mid May hampered the germination and early vegetative development of maize in particular, but also other summer crops. The yield outlook for winter crops was revised slightly upwards, while our summer crop outlook remains in line with the historical trend.

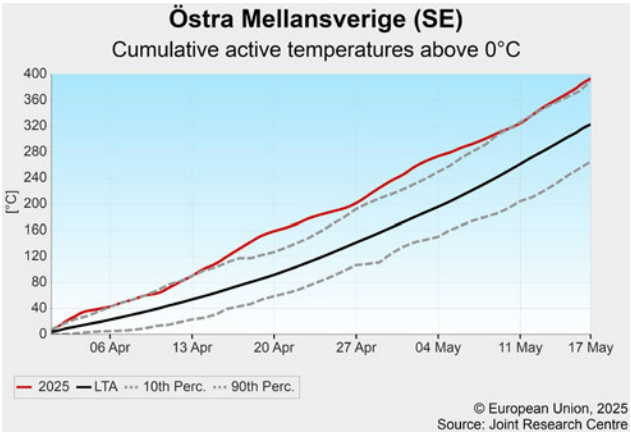




Denmark and Sweden - crops in good condition, but rain is urgently needed

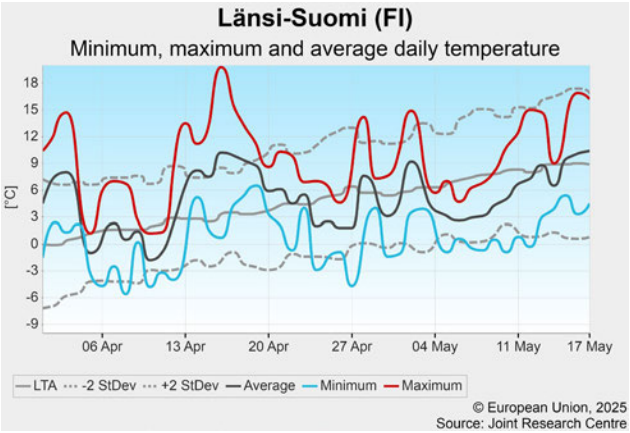
Drier- and warmer-than-usual conditions prevailed in both countries. In Denmark, precipitation was 30–50 % below the LTA, while a positive temperature anomaly was reported, resulting in cumulative temperatures 15 % above normal. A similar picture was reported for Sweden, with precipitation down by more than 50 % and cumulative temperatures up by 20 %. Sowings were close to completion, and both autumn and spring crops are still expected to be in good condition thanks to short rainfall episodes. This is confirmed by the satellite signal, which remains close to or above normal. However, more rain is needed in the coming weeks to maintain the good yield potential of winter cereals as they advance towards the critical phase of flowering. Our yield forecasts remain unchanged and are still based on the trend for both countries.

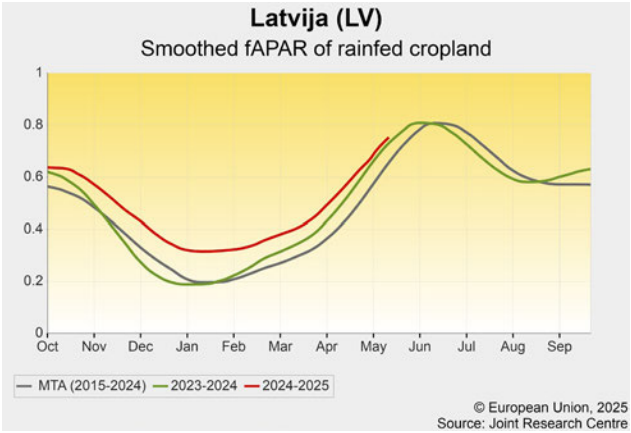




Estonia, Latvia, Lithuania, Finland - positive general outlook

A large positive temperature anomaly was observed around mid April, with average temperatures up to 10 °C warmer than normal, while the end of the reporting period was colder than usual. This cold episode, accompanied by 55 mm of rain, slightly delayed spring sowing in southern Finland. However, no significant impact on yields is expected. In the Baltic states, sowing is considered complete or close to completion. The satellite signal is close to or above the MTA in all four countries, indicating advanced phenology overall and good crop conditions. The yield outlook is generally positive in the region; as it is still early in the season, our yield forecasts remain unchanged and are based on the trend.



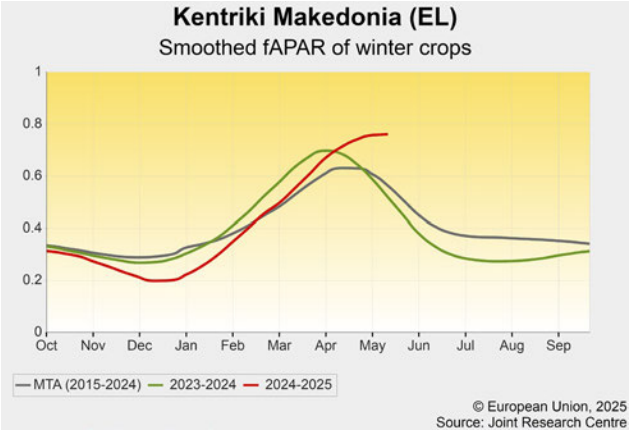


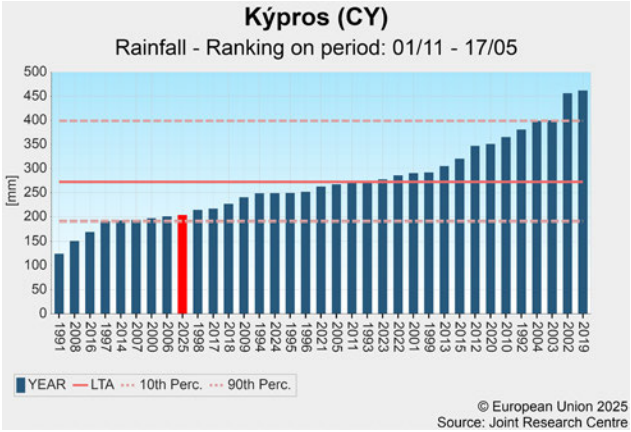
Greece and Cyprus - good yield outlook in Greece, but some concern in Cyprus

Favourable weather conditions, with well-distributed rainfall and a return to warm temperatures, have supported the growth of winter crops in Greece. Biomass indicators derived from our model simulations and satellite observations are now well above the average. Meanwhile, the sowing of summer crops has been completed in most of the country. In the main producing regions, grain maize is approaching the end of the vegetative stage, while sunflower is just entering it.

In Cyprus, lower-than-average rainfall throughout the growing season, with a considerable deficit in January that has not yet been compensated for, led to around-average biomass accumulation, as indicated by our fAPAR data from satellite imagery. However, due to the continued water deficit and consequent early senescence of winter barley, grain weights were well below average, as confirmed by our crop model simulations. This, together with the irrigation issues in western Cyprus reported in the April edition of the MARS Bulletin, means that the positive yield forecast can no longer be maintained.

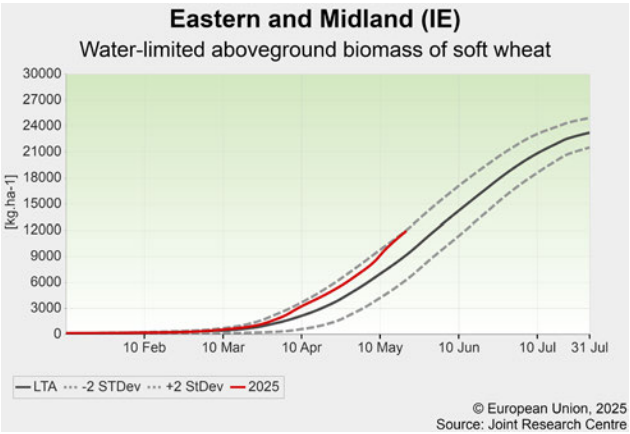
Our yield forecasts for Greece have been revised upwards for durum wheat, remaining above the five-year average for both winter and summer crops. In contrast, our crop yield forecast for winter barley in Cyprus has been revised downwards by 5.7 %, now slightly below the five-year average.

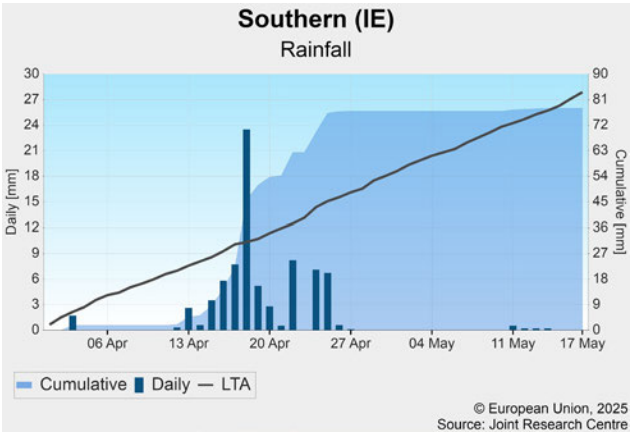




Ireland - positive outlook, but rain is needed for spring crops

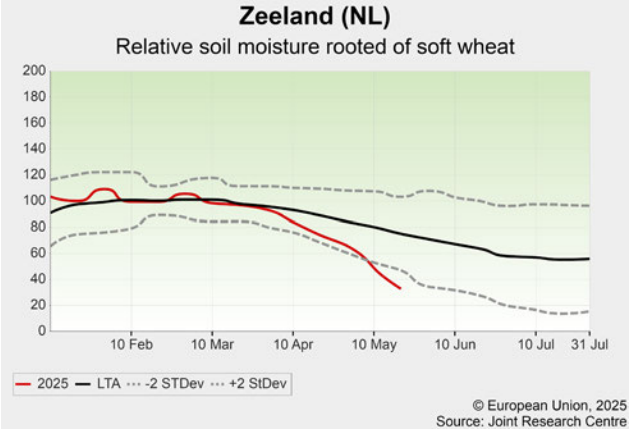
Across Ireland, both satellite and model data indicate a well-advanced growing season. Our model simulations point to biomass accumulation in winter crops being significantly above the average, with the development stage ahead of schedule; crops are currently in the reproductive phase. The sowing of spring crops was concluded earlier than usual, and the newly sown crops initially benefited from abundant rainfall in mid April. However, since then, dry and warmer-than-average conditions have persisted, leading to a decline in soil moisture that may hamper the early growth of the recently emerged crops. Thanks to the positive development of winter cereals and rapeseed, our yield forecasts have been increased slightly compared with last month, and remain consistently above the five-year average. In contrast, due to mixed signals observed for spring crops, the forecasts for spring barley and field beans remain unchanged.

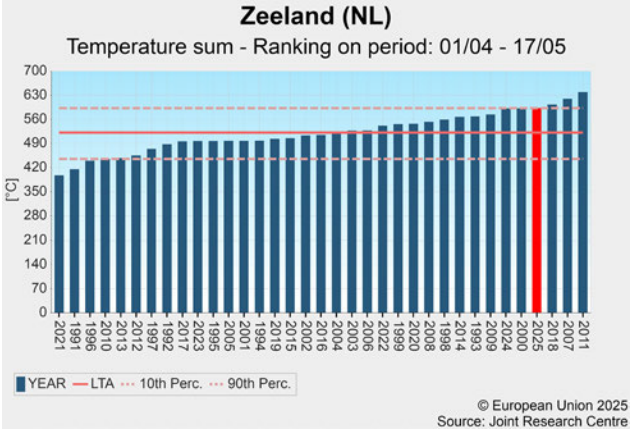




Benelux countries - persistent dryness increases risk to crops

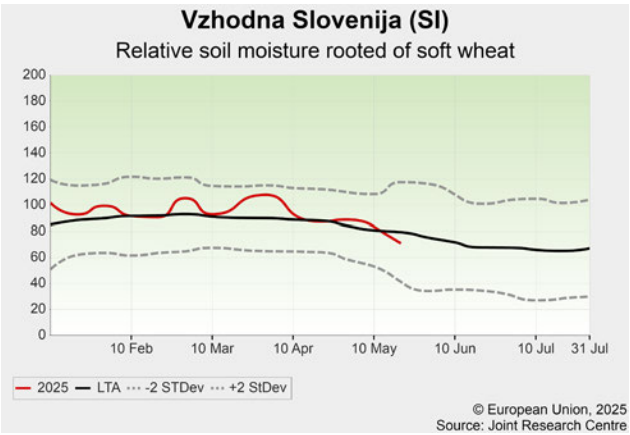
The Benelux countries have been experiencing an extreme rainfall deficit since mid February, with record-low values especially in the west. Although the absence of rainfall combined with above-average sunshine and temperature accumulation was initially beneficial for an early start and finish of the sowing campaign, the low soil moisture is now posing a risk to the sustained growth of winter and spring crops, and for the emergence of recently sown summer crops. In some areas, farmers have been instructed to retain water as much as possible, and reports of irrigation are increasing. If water availability continues to decrease, water restrictions are likely to be introduced soon. Neither the 10-day weather forecast nor the subseasonal outlook indicates any significant rainfall for the Benelux region. As a consequence, our yield forecasts for winter crops have been revised slightly downwards (by 2-3 %) for the Netherlands and Belgium compared to last month's forecast.

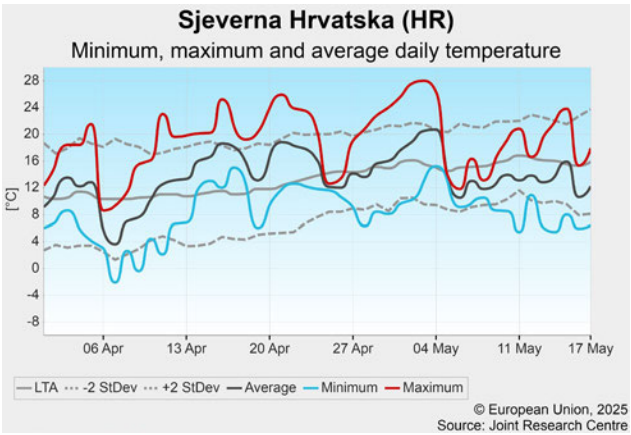




Slovenia and Croatia - good progress despite unsettled spring sowing

Winter cereals benefited from frequent precipitation during the reporting period, and their growth is currently aligned with the LTA. In both countries, our model simulations indicate adequate soil moisture levels, slightly lower in Slovenia than in Croatia. The sowing campaign for summer crops was hampered by the unsettled and sometimes cold weather, and the last sowings were delayed until the very end of the suitable time window. Therefore, fair weather and good topsoil conditions over the coming weeks will be key to ensuring good emergence and early development. Our summer crop yield forecasts based on the long-term trend have been confirmed, while for winter crops our yield forecasts have been revised upwards, slightly outperforming the five-year average.



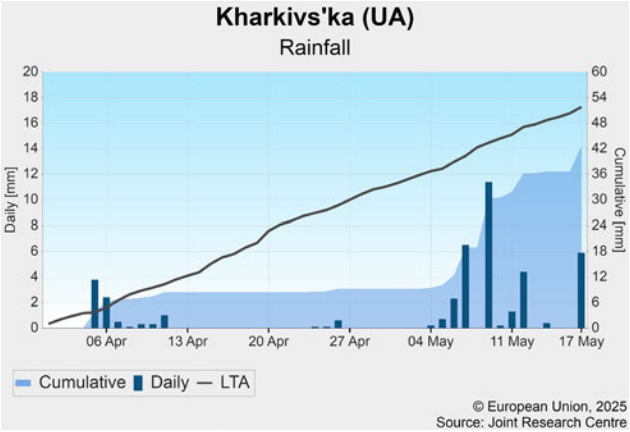


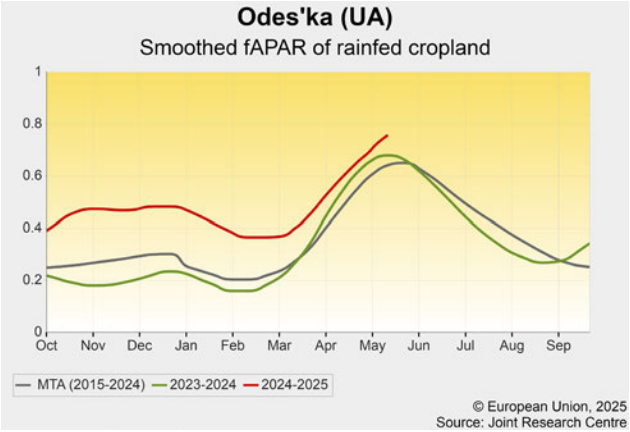
4.2 Black Sea area

Ukraine - improved conditions but concerns in the east

While rainfall in early May was beneficial to winter and spring crops, especially in the east, concerns remain due to the lasting effects of the winter drought and the difficulties farmers face in non-government-controlled areas. In the central and western areas, winter crops are in fair condition, thanks to regular rainfall during the reporting period. Winter cereals have reached flowering in most oblasts, with advanced development in the southern oblasts (e.g. *Odes'ka*). Rapeseed has also entered the yield formation phase, with limited impacts expected from the cold spell in early April.

The sowing campaign for summer crops is proceeding at average pace and is nearing completion. The early development of summer crops looks promising, supported by the rain in early May. Our yield forecasts for winter and summer crops remain unchanged, based on the long-term trend.





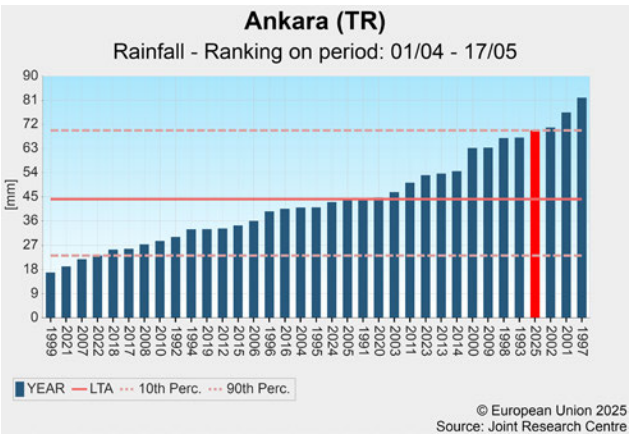
Türkiye - beneficial rainfall for winter crops

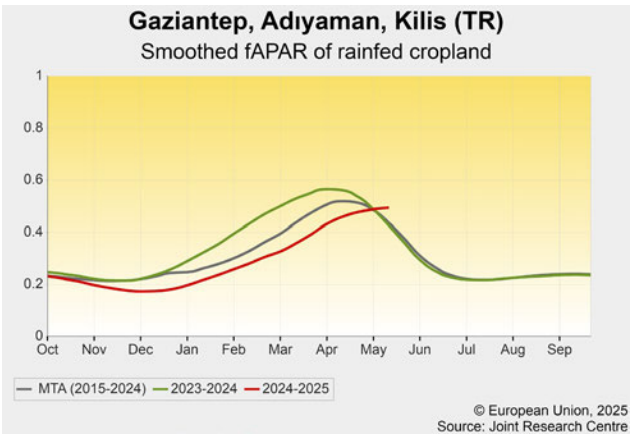
In Türkiye, well-distributed precipitation alleviated the dry conditions that had been affecting winter crops.

In western and central *Anatolia*, frequent rainfall restored soil moisture to favourable levels. Crop biomass accumulation reached average values (e.g. in *Ankara*); however, crop development, now close to flowering, remains slightly delayed.

In south-eastern *Anatolia*, while benefitting from well-distributed precipitation, crops have not yet fully recovered from the delay in sowing. Average-to-good yields are still possible except in *Gaziantep*, *Adıyaman* and *Kilis*, where winter crops stay impacted from the dry conditions of the previous months.

In the Black Sea region, winter crops are now approaching flowering in very good condition. Summer crops emerged under unfavourable dry conditions in all the growing regions, but their situation has improved with the recent rainfall. Our forecasts for winter crop yields have been revised upwards but remain below the trend. The forecast for maize is still based on trend analysis.

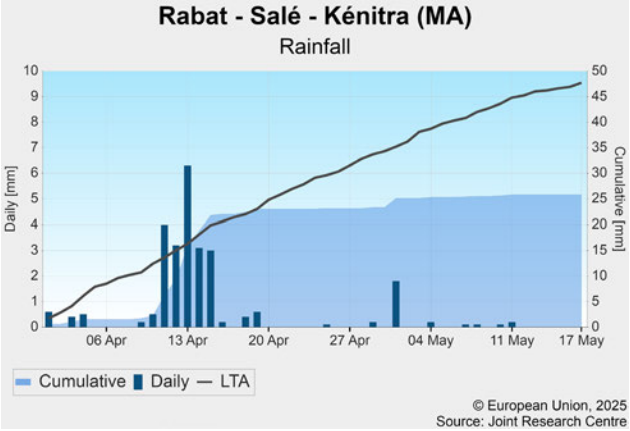


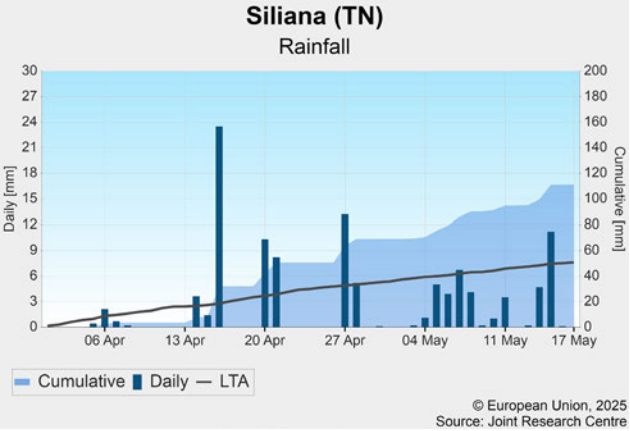


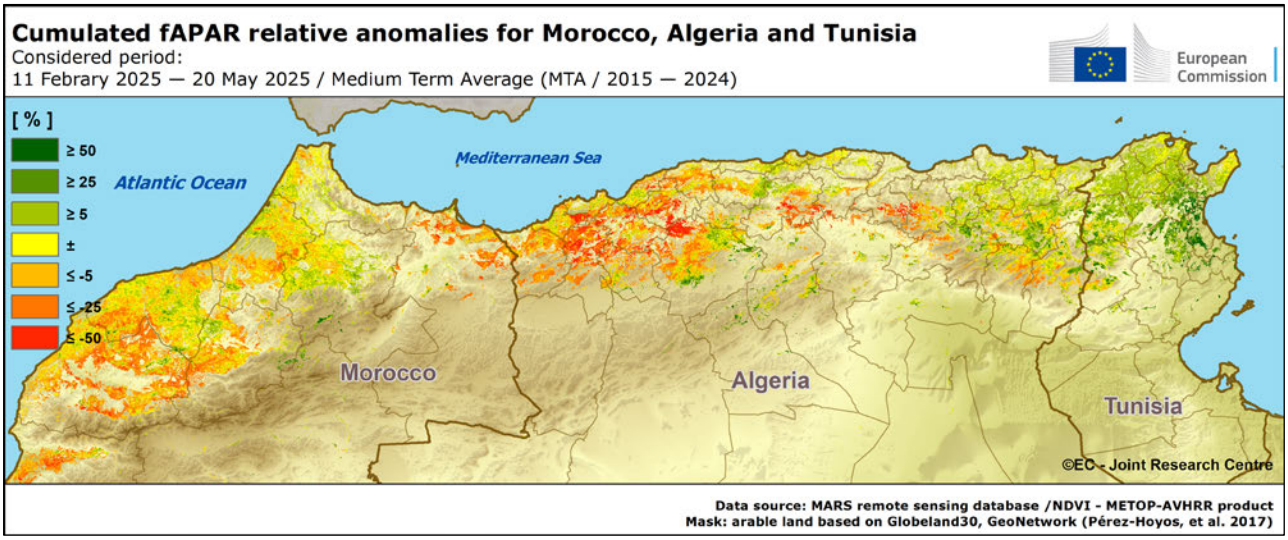
4.3 Maghreb

Morocco, Algeria and Tunisia - poor prospects in the west, but positive outlook in the east

A severe water deficit during autumn and winter significantly hindered the growth of winter cereals in the western regions of Maghreb, leading to crop failures locally. Since then, there has been substantial rainfall throughout the region. Southern Morocco, north-eastern Algeria and northern Tunisia received more than 200 % of the LTA rainfall during the review period. Combined with mild temperatures, the abundant rainfall provided optimal conditions for the flowering and grain-filling of winter cereals, particularly in eastern Algeria and Tunisia. Unfortunately, in many regions of Morocco and western Algeria, the drought-damaged winter cereals were not able to take full advantage of this late water supply. We therefore expect below-average yields in Morrocco for the sixth consecutive year, fair yields in Algeria and above-average yields in Tunisia, where record-high yields could be achieved locally.



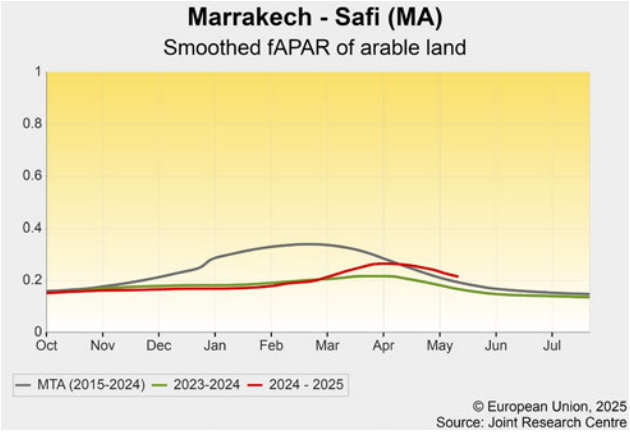


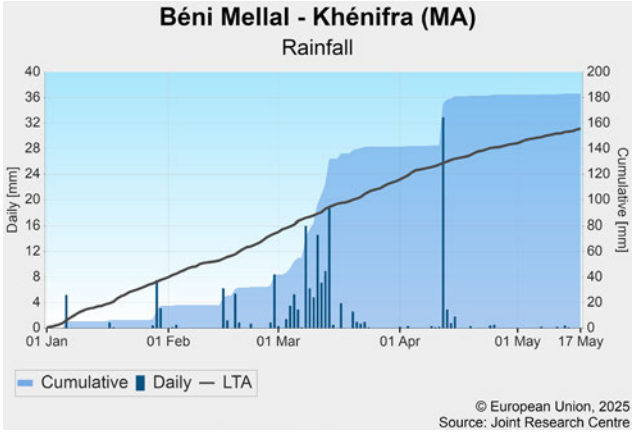


Morocco

While the extended dry spell in autumn and winter affected the entire country, rainfall since the end of winter has led to a more mixed picture, including partial recovery. Remote sensing indicators point to increased biomass accumulation after the first rainfall in mid February in, for example, *Fés-Meknès*, where winter cereals were still able to benefit from the late rain so that yields recovered to almost average levels in the region. However, winter cereals remain in poor condition in the most drought-affected regions (e.g. *Marrakech*, *Béni Mellal*). Several early-sown crops failed to recover and were instead used as animal pasture. As a result, the harvested area for winter cereals in these regions will be significantly reduced, limited to fields capable of producing acceptable yields.

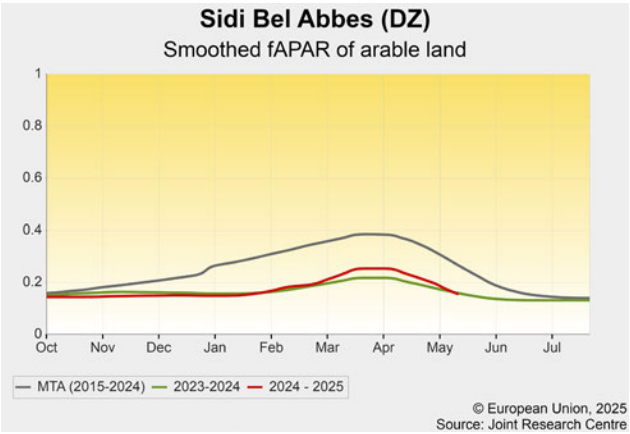
Our crop yield forecasts at the country level have been revised upwards to account for the partial recovery, now 2 % above last year, but still about 10 % below the five-year average. The total cereal production is expected to be higher than last year, due to increased yields but also thanks to an increase in the area harvested.

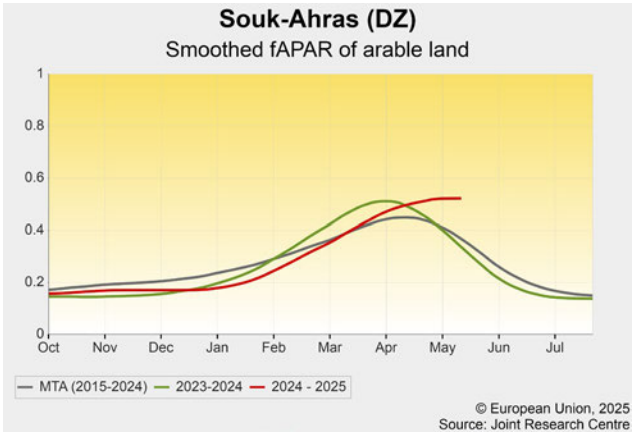




Algeria

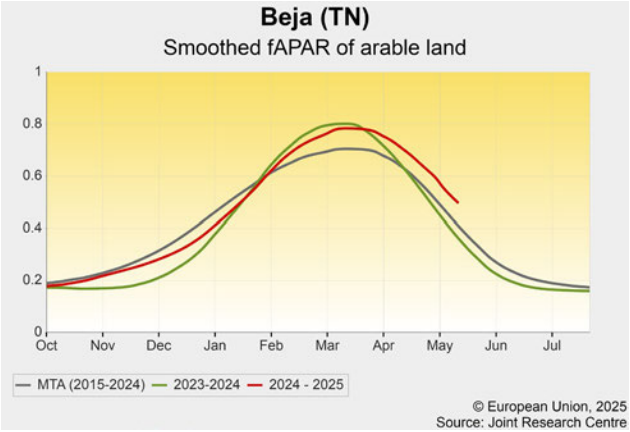
Winter cereals are in mixed conditions in Algeria. Crops suffered from a prolonged drought in the west (e.g. *Sidi Bel Abbès, Tiaret*), where yields were irreversibly negatively affected. Nevertheless, crop conditions significantly improved in the east (e.g. *Souk-Ahras*, *Oum El Bouaghi*, *Constantine*), thanks to abundant precipitation during the review period. In late April to early May, rain was crucial, providing optimal water supply to struggling crops during the critical flowering and grain-filling stages. The improved yield prospects in the eastern regions offset the deteriorating outlook in the west. At the country level, our forecasts have been slightly revised upwards (by 6 % for wheat and 3 % for barley), and are now about 5 % above the five-year averaged.

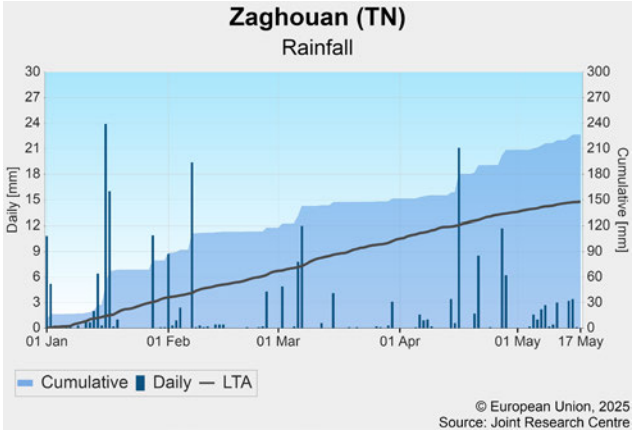




Tunisia

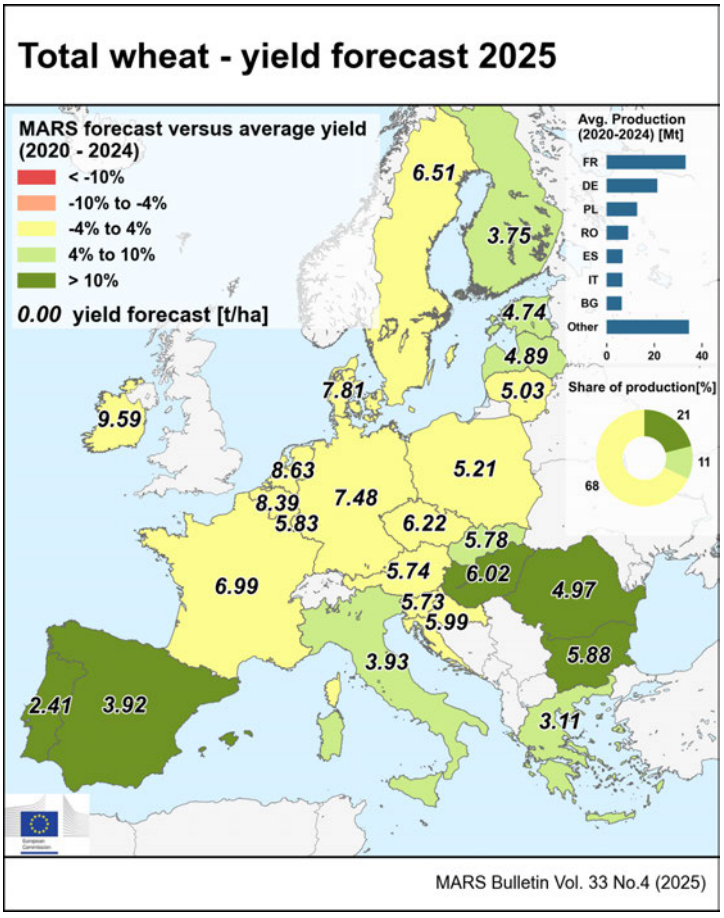
Abundant rainfall during the review period and slightly increased temperatures continued the favourable weather conditions observed since the start of the growing season. These ideal conditions supported the reproductive stages of winter cereals and further improved their yield potential. Remote sensing data indicate biomass levels exceeding the five-year average across all *wilayas*. New record-high yields could be reached locally. However, in some areas (e.g. *Bizerte*, *Zaghouan*), the abundant rainfall has raised concerns about increasing pest pressure, which could threaten crop quality. We confirm our positive forecasts, projecting yields to be up to 30 % higher than the five-year averaged.



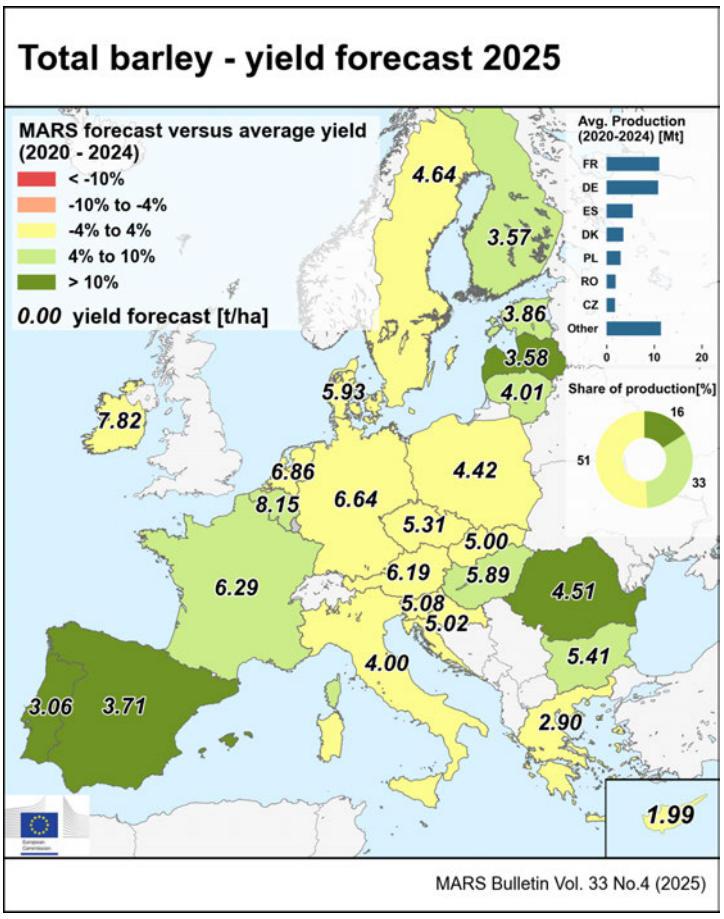


5. Crop yield forecast

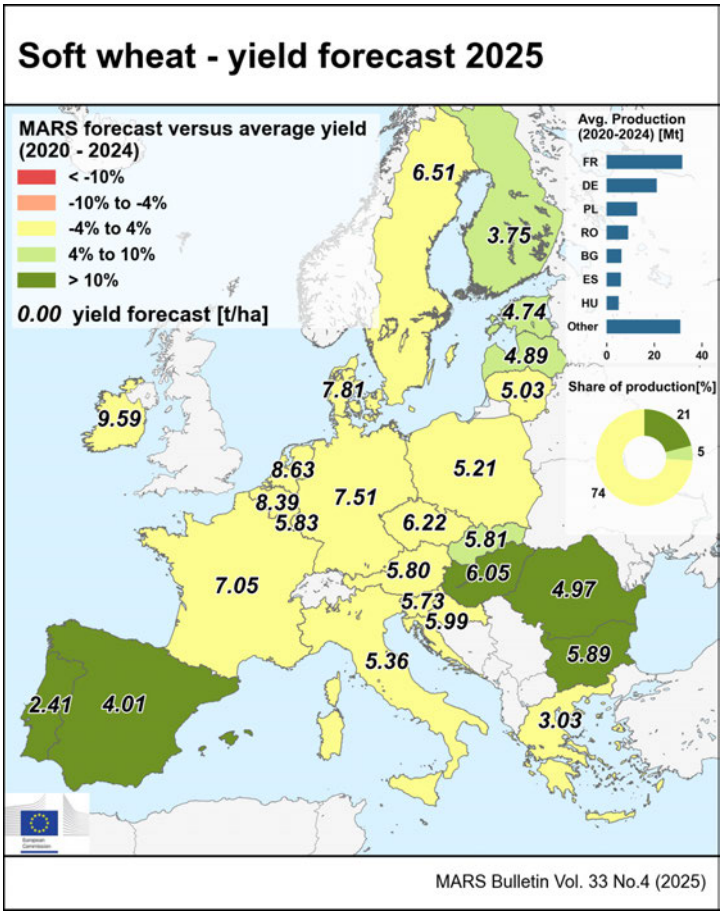
Country	Total wheat (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	5.55	5.38	**5.83**	+ 5	+ 8	+ 0
AT	5.80	5.71	**5.74**	– 1	+ 0	+ 2
BE	8.24	6.61	**8.39**	+ 2	+ 27	– 2
BG	5.24	5.73	**5.88**	+ 12	+ 3	+ 2
CY	—	—	—	—	—	—
CZ	6.18	5.95	**6.22**	+ 1	+ 5	+ 0
DE	7.45	7.08	**7.48**	+ 0	+ 6	– 2
DK	7.76	7.12	**7.81**	+ 1	+ 10	+ 0
EE	4.42	4.30	**4.74**	+ 7	+ 10	+ 0
EL	2.96	3.15	**3.11**	+ 5	– 1	+ 3
ES	3.30	3.68	**3.92**	+ 19	+ 7	+ 5
FI	3.42	3.50	**3.75**	+ 9	+ 7	+ 0
FR	6.85	6.04	**6.99**	+ 2	+ 16	– 1
HR	5.77	5.85	**5.99**	+ 4	+ 2	+ 1
HU	5.45	5.79	**6.02**	+ 10	+ 4	+ 0
IE	9.67	8.66	**9.59**	– 1	+ 11	+ 1
IT	3.75	3.57	**3.93**	+ 5	+ 10	+ 1
LT	4.87	5.04	**5.03**	+ 3	– 0	+ 0
LU	5.82	5.20	**5.83**	+ 0	+ 12	– 1
LV	4.63	4.57	**4.89**	+ 6	+ 7	+ 0
MT	—	—	—	—	—	—
NL	8.45	7.05	**8.63**	+ 2	+ 22	– 1
PL	5.27	5.20	**5.21**	– 1	+ 0	– 2
PT	2.11	2.35	**2.41**	+ 14	+ 2	+ 10
RO	4.11	4.61	**4.97**	+ 21	+ 8	+ 2
SE	6.39	6.16	**6.51**	+ 2	+ 6	+ 0
SI	5.67	5.48	**5.73**	+ 1	+ 5	+ 3
SK	5.54	5.45	**5.78**	+ 4	+ 6	+ 0



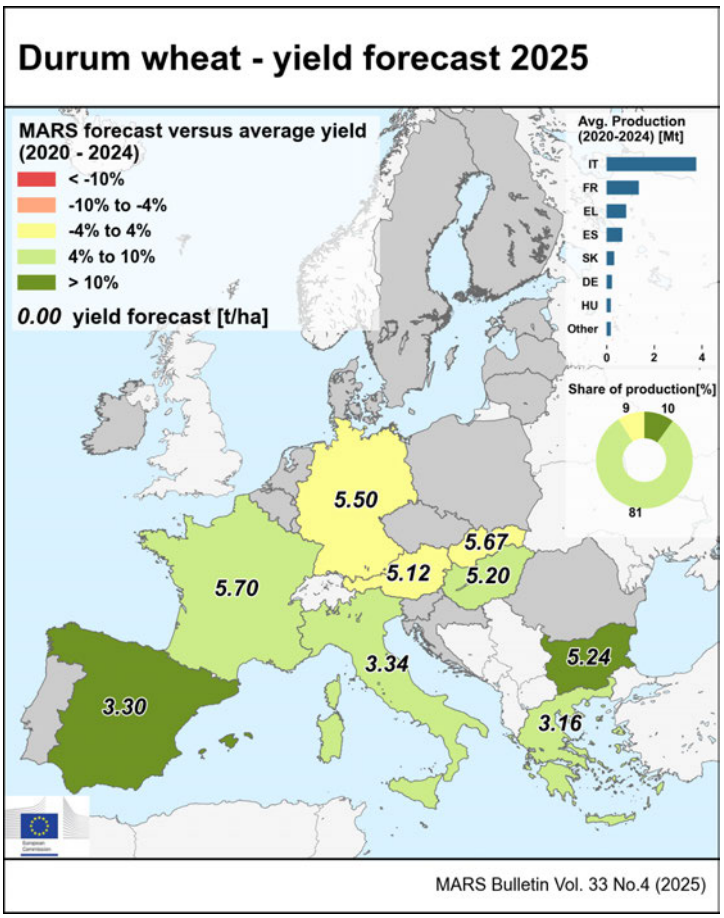
Country	Total barley (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	4.76	4.81	**5.14**	+ 8	+ 7	+ 1
AT	6.11	5.70	**6.19**	+ 1	+ 9	+ 1
BE	7.72	6.22	**8.15**	+ 6	+ 31	– 3
BG	5.07	5.40	**5.41**	+ 7	+ 0	+ 0
CY	2.01	1.75	**1.99**	– 1	+ 14	– 6
CZ	5.44	5.27	**5.31**	– 3	+ 1	– 1
DE	6.70	6.39	**6.64**	– 1	+ 4	– 1
DK	5.84	5.57	**5.93**	+ 2	+ 6	+ 0
EE	3.63	3.32	**3.86**	+ 6	+ 16	+ 0
EL	2.81	2.63	**2.90**	+ 3	+ 10	+ 0
ES	2.38	3.26	**3.71**	+ 56	+ 14	+ 11
FI	3.34	3.62	**3.57**	+ 7	– 1	+ 0
FR	6.03	5.45	**6.29**	+ 4	+ 15	– 1
HR	4.85	4.93	**5.02**	+ 4	+ 2	+ 2
HU	5.51	5.53	**5.89**	+ 7	+ 7	+ 0
IE	7.75	7.51	**7.82**	+ 1	+ 4	+ 0
IT	4.06	3.73	**4.00**	– 1	+ 7	+ 5
LT	3.83	3.90	**4.01**	+ 5	+ 3	+ 0
LU	—	—	—	—	—	—
LV	3.20	2.99	**3.58**	+ 12	+ 20	+ 0
MT	—	—	—	—	—	—
NL	6.74	6.23	**6.86**	+ 2	+ 10	– 2
PL	4.37	4.34	**4.42**	+ 1	+ 2	– 2
PT	2.72	3.23	**3.06**	+ 13	– 5	+ 7
RO	3.99	4.71	**4.51**	+ 13	– 4	+ 1
SE	4.49	4.44	**4.64**	+ 3	+ 4	+ 0
SI	5.08	4.83	**5.08**	+ 0	+ 5	+ 0
SK	5.07	4.72	**5.00**	– 1	+ 6	+ 0



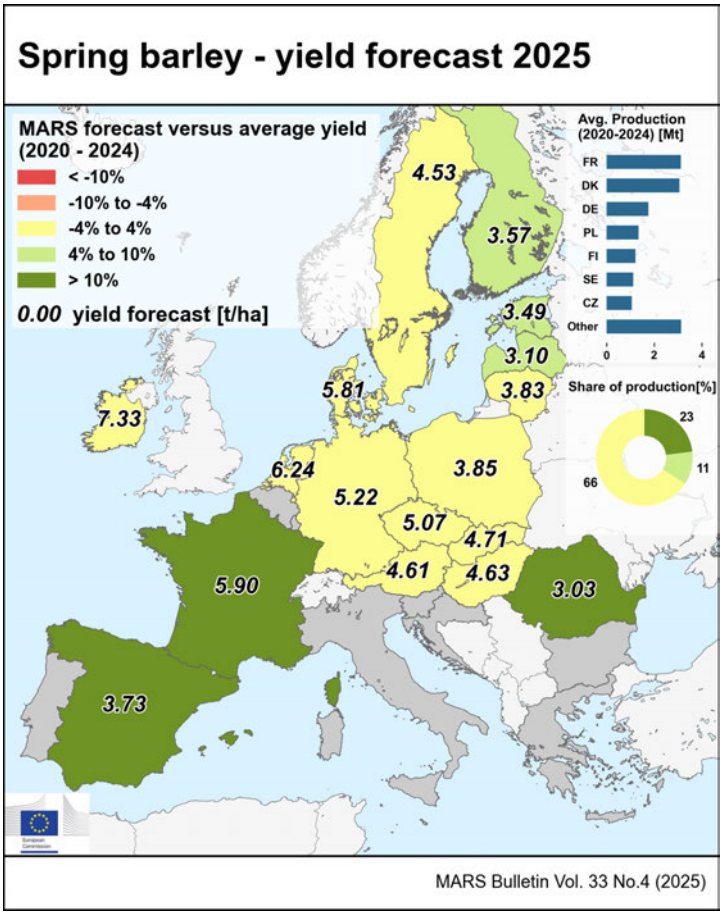
Country	Soft wheat (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	5.77	5.57	**6.04**	+ 5	+ 8	+ 0
AT	5.86	5.76	**5.80**	– 1	+ 1	+ 2
BE	8.24	6.61	**8.39**	+ 2	+ 27	– 2
BG	5.25	5.76	**5.89**	+ 12	+ 2	+ 2
CY	—	—	—	—	—	—
CZ	6.18	5.95	**6.22**	+ 1	+ 5	+ 0
DE	7.48	7.11	**7.51**	+ 0	+ 6	– 2
DK	7.76	7.12	**7.81**	+ 1	+ 10	+ 0
EE	4.42	4.30	**4.74**	+ 7	+ 10	+ 0
EL	2.96	2.98	**3.03**	+ 2	+ 2	+ 0
ES	3.40	3.79	**4.01**	+ 18	+ 6	+ 5
FI	3.42	3.50	**3.75**	+ 9	+ 7	+ 0
FR	6.94	6.09	**7.05**	+ 2	+ 16	– 1
HR	5.77	5.85	**5.99**	+ 4	+ 2	+ 1
HU	5.47	5.82	**6.05**	+ 11	+ 4	+ 0
IE	9.67	8.66	**9.59**	– 1	+ 11	+ 1
IT	5.30	4.93	**5.36**	+ 1	+ 9	+ 1
LT	4.87	5.04	**5.03**	+ 3	– 0	+ 0
LU	5.82	5.20	**5.83**	+ 0	+ 12	– 1
LV	4.63	4.57	**4.89**	+ 6	+ 7	+ 0
MT	—	—	—	—	—	—
NL	8.45	7.05	**8.63**	+ 2	+ 22	– 1
PL	5.27	5.20	**5.21**	– 1	+ 0	– 2
PT	2.11	2.35	**2.41**	+ 14	+ 2	+ 10
RO	4.11	4.61	**4.97**	+ 21	+ 8	+ 2
SE	6.39	6.16	**6.51**	+ 2	+ 6	+ 0
SI	5.67	5.48	**5.73**	+ 1	+ 5	+ 3
SK	5.54	5.46	**5.81**	+ 5	+ 6	+ 0



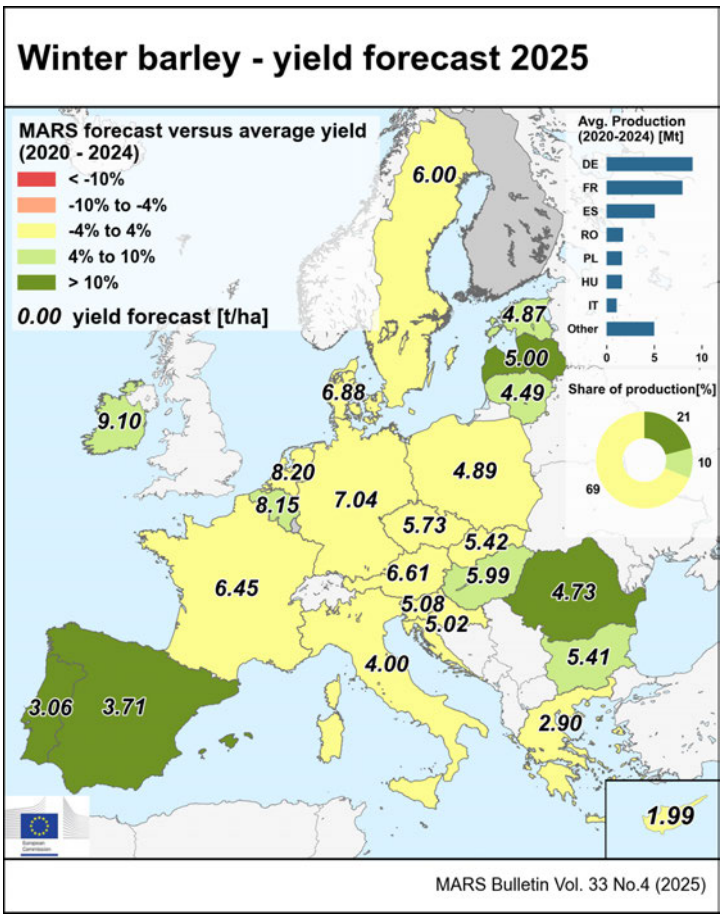
Country	Durum wheat (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	3.43	3.50	**3.77**	+ 10	+ 8	+ 2
AT	5.17	5.31	**5.12**	– 1	– 4	– 0
BE	—	—	—	—	—	—
BG	4.55	4.22	**5.24**	+ 15	+ 24	– 0
CY	—	—	—	—	—	—
CZ	—	—	—	—	—	—
DE	5.60	5.89	**5.50**	– 2	– 7	– 1
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	2.96	3.25	**3.16**	+ 7	– 3	+ 4
ES	2.57	2.92	**3.30**	+ 29	+ 13	+ 8
FI	—	—	—	—	—	—
FR	5.32	5.10	**5.70**	+ 7	+ 12	+ 2
HR	—	—	—	—	—	—
HU	4.89	5.34	**5.20**	+ 6	– 3	+ 1
IE	—	—	—	—	—	—
IT	3.08	2.97	**3.34**	+ 9	+ 12	+ 1
LT	—	—	—	—	—	—
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	—	—	—	—	—	—
PT	—	—	—	—	—	—
RO	—	—	—	—	—	—
SE	—	—	—	—	—	—
SI	—	—	—	—	—	—
SK	5.52	5.42	**5.67**	+ 3	+ 4	+ 1



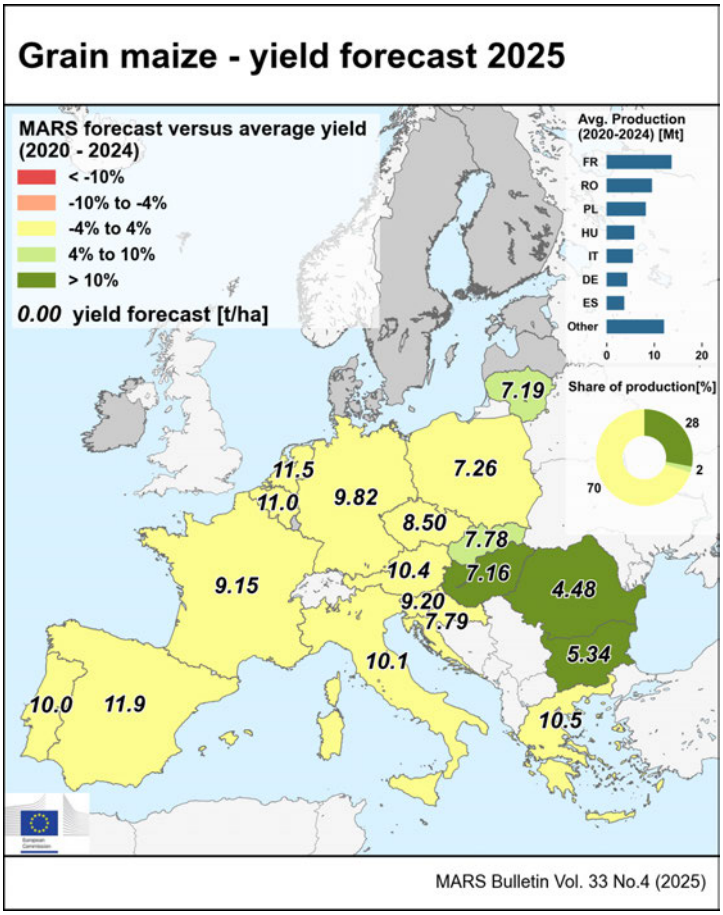
Country	Spring barley (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	4.66	4.71	**4.86**	+ 4	+ 3	– 0
AT	4.62	4.74	**4.61**	– 0	– 3	– 0
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	5.18	5.43	**5.07**	– 2	– 7	+ 0
DE	5.12	5.19	**5.22**	+ 2	+ 1	– 1
DK	5.71	5.47	**5.81**	+ 2	+ 6	+ 0
EE	3.34	3.01	**3.49**	+ 5	+ 16	+ 0
EL	—	—	—	—	—	—
ES	2.59	3.28	**3.73**	+ 44	+ 14	+ 11
FI	3.34	3.62	**3.57**	+ 7	– 1	+ 0
FR	5.36	5.21	**5.90**	+ 10	+ 13	– 1
HR	—	—	—	—	—	—
HU	4.50	4.44	**4.63**	+ 3	+ 4	+ 1
IE	7.32	7.32	**7.33**	+ 0	+ 0	+ 0
IT	—	—	—	—	—	—
LT	3.69	3.63	**3.83**	+ 4	+ 6	+ 0
LU	—	—	—	—	—	—
LV	2.87	2.67	**3.10**	+ 8	+ 16	+ 0
MT	—	—	—	—	—	—
NL	6.15	5.93	**6.24**	+ 2	+ 5	– 2
PL	3.87	3.84	**3.85**	– 1	+ 0	– 1
PT	—	—	—	—	—	—
RO	2.44	3.22	**3.03**	+ 24	– 6	+ 7
SE	4.38	4.36	**4.53**	+ 3	+ 4	+ 0
SI	—	—	—	—	—	—
SK	4.79	4.54	**4.71**	– 2	+ 4	+ 0



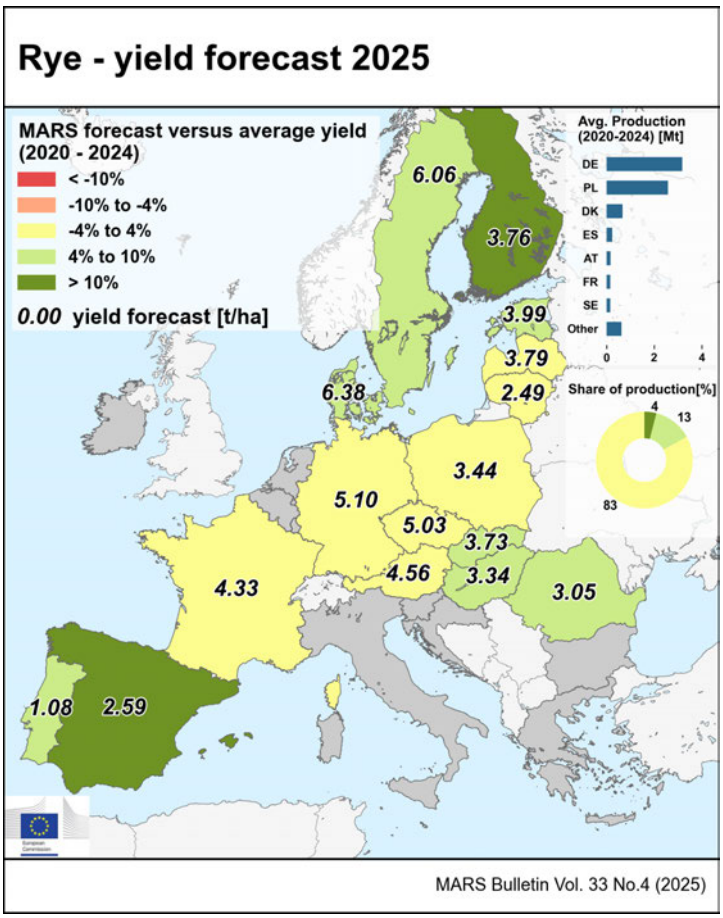
Country	Winter barley (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	4.81	4.86	**5.28**	+ 10	+ 9	+ 2
AT	6.52	5.93	**6.61**	+ 1	+ 11	+ 2
BE	7.72	6.22	**8.15**	+ 6	+ 31	– 3
BG	5.07	5.40	**5.41**	+ 7	+ 0	+ 0
CY	2.01	1.75	**1.99**	– 1	+ 14	– 6
CZ	5.89	5.04	**5.73**	– 3	+ 14	– 2
DE	7.13	6.72	**7.04**	– 1	+ 5	– 0
DK	6.81	6.52	**6.88**	+ 1	+ 6	+ 0
EE	4.47	3.95	**4.87**	+ 9	+ 23	+ 0
EL	2.81	2.63	**2.90**	+ 3	+ 10	+ 0
ES	2.37	3.26	**3.71**	+ 57	+ 14	+ 11
FI	—	—	—	—	—	—
FR	6.34	5.56	**6.45**	+ 2	+ 16	– 1
HR	4.85	4.93	**5.02**	+ 4	+ 2	+ 2
HU	5.59	5.65	**5.99**	+ 7	+ 6	+ 0
IE	8.71	8.13	**9.10**	+ 4	+ 12	+ 1
IT	4.06	3.73	**4.00**	– 1	+ 7	+ 5
LT	4.29	4.42	**4.49**	+ 5	+ 2	+ 0
LU	—	—	—	—	—	—
LV	4.21	3.57	**5.00**	+ 19	+ 40	+ 0
MT	—	—	—	—	—	—
NL	7.98	6.79	**8.20**	+ 3	+ 21	– 0
PL	4.90	4.67	**4.89**	– 0	+ 5	– 2
PT	2.72	3.23	**3.06**	+ 13	– 5	+ 7
RO	4.22	4.90	**4.73**	+ 12	– 4	+ 0
SE	5.82	5.61	**6.00**	+ 3	+ 7	+ 0
SI	5.08	4.83	**5.08**	+ 0	+ 5	+ 0
SK	5.48	4.99	**5.42**	– 1	+ 9	+ 1



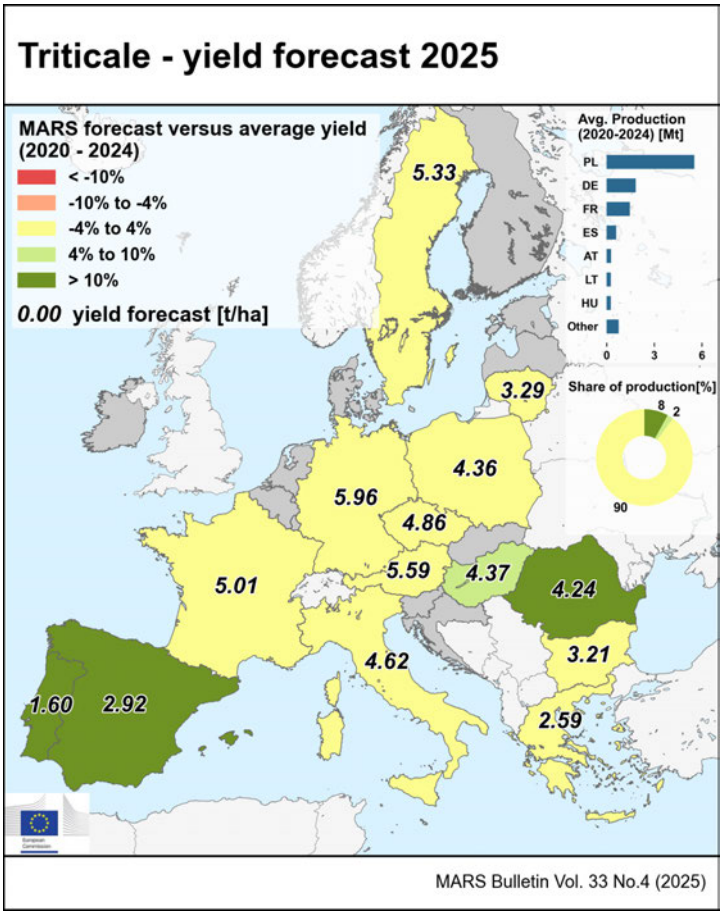
Country	Grain maize (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	7.09	6.74	**7.45**	+ 5	+ 11	+ 0
AT	10.4	9.90	**10.4**	– 0	+ 5	+ 0
BE	11.1	12.1	**11.0**	– 1	– 9	+ 0
BG	4.74	3.18	**5.34**	+ 13	+ 68	+ 0
CY	—	—	—	—	—	—
CZ	8.74	8.31	**8.50**	– 3	+ 2	+ 0
DE	9.61	10.1	**9.82**	+ 2	– 2	+ 0
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	10.4	9.20	**10.5**	+ 1	+ 14	+ 0
ES	12.1	11.8	**11.9**	– 1	+ 1	+ 0
FI	—	—	—	—	—	—
FR	8.93	9.30	**9.15**	+ 3	– 2	+ 0
HR	7.51	7.69	**7.79**	+ 4	+ 1	+ 0
HU	6.48	5.97	**7.16**	+ 10	+ 20	+ 0
IE	—	—	—	—	—	—
IT	10.1	9.94	**10.1**	– 0	+ 2	+ 0
LT	6.67	7.87	**7.19**	+ 8	– 9	+ 0
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	11.6	11.0	**11.5**	– 1	+ 5	+ 0
PL	7.29	7.36	**7.26**	– 0	– 1	+ 0
PT	9.87	10.1	**10.0**	+ 2	– 0	+ 0
RO	3.98	2.66	**4.48**	+ 13	+ 69	+ 0
SE	—	—	—	—	—	—
SI	8.95	9.20	**9.20**	+ 3	+ 0	+ 0
SK	7.20	7.23	**7.78**	+ 8	+ 8	+ 0



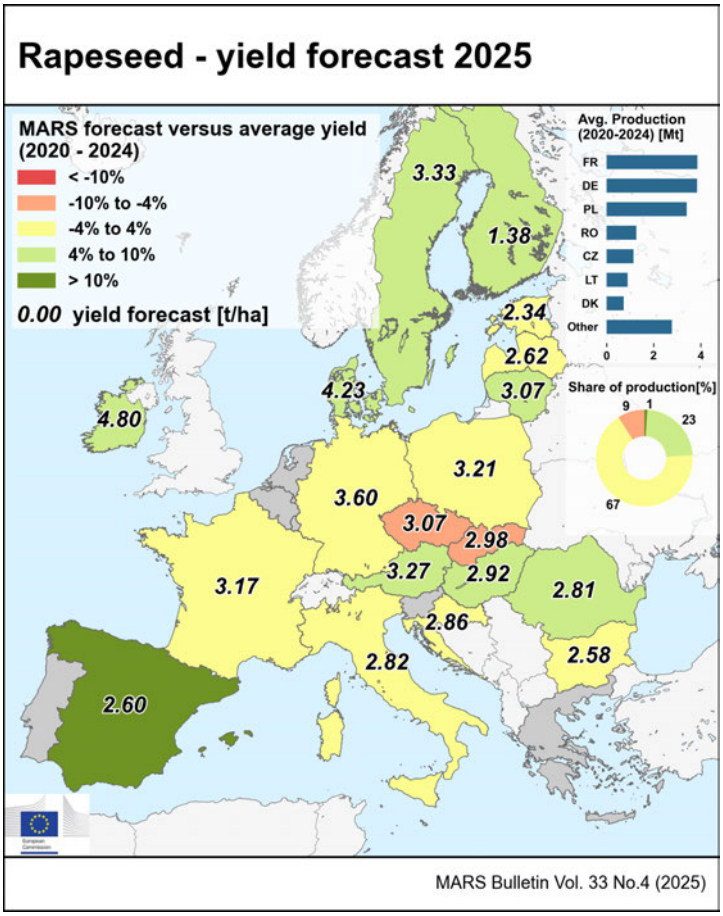
Country	Rye (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	4.22	4.19	**4.19**	– 1	+ 0	– 2
AT	4.66	3.98	**4.56**	– 2	+ 15	+ 0
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	5.06	4.32	**5.03**	– 1	+ 16	+ 0
DE	5.28	5.28	**5.10**	– 3	– 3	– 3
DK	6.07	5.91	**6.38**	+ 5	+ 8	+ 0
EE	3.79	3.98	**3.99**	+ 5	+ 0	+ 0
EL	—	—	—	—	—	—
ES	2.26	2.22	**2.59**	+ 15	+ 17	+ 9
FI	3.41	2.73	**3.76**	+ 10	+ 38	+ 0
FR	4.17	3.79	**4.33**	+ 4	+ 14	+ 0
HR	—	—	—	—	—	—
HU	3.19	3.22	**3.34**	+ 5	+ 4	+ 1
IE	—	—	—	—	—	—
IT	—	—	—	—	—	—
LT	2.54	2.38	**2.49**	– 2	+ 5	+ 0
LU	—	—	—	—	—	—
LV	3.71	3.37	**3.79**	+ 2	+ 13	+ 0
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	3.50	3.57	**3.44**	– 2	– 4	– 3
PT	1.03	1.01	**1.08**	+ 4	+ 6	+ 4
RO	2.78	2.98	**3.05**	+ 9	+ 2	+ 0
SE	5.79	5.66	**6.06**	+ 5	+ 7	+ 0
SI	—	—	—	—	—	—
SK	3.55	3.28	**3.73**	+ 5	+ 14	—



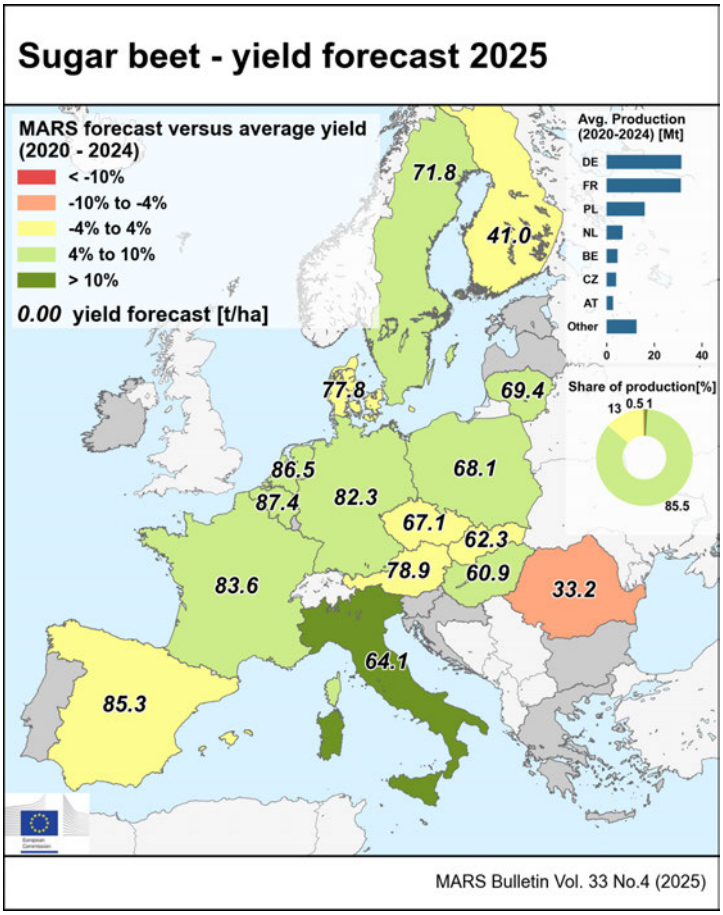
Country	Triticale (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	4.37	4.29	**4.45**	+ 2	+ 4	– 1
AT	5.51	5.08	**5.59**	+ 2	+ 10	– 1
BE	—	—	—	—	—	—
BG	3.13	3.05	**3.21**	+ 3	+ 5	– 7
CY	—	—	—	—	—	—
CZ	4.87	4.48	**4.86**	– 0	+ 8	+ 1
DE	5.87	5.69	**5.96**	+ 2	+ 5	– 1
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	2.50	2.13	**2.59**	+ 4	+ 21	+ 0
ES	2.35	2.65	**2.92**	+ 24	+ 10	+ 10
FI	—	—	—	—	—	—
FR	4.85	4.32	**5.01**	+ 3	+ 16	+ 0
HR	—	—	—	—	—	—
HU	4.03	4.12	**4.37**	+ 8	+ 6	+ 0
IE	—	—	—	—	—	—
IT	4.48	4.41	**4.62**	+ 3	+ 5	+ 5
LT	3.33	3.44	**3.29**	– 1	– 4	+ 0
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	4.42	4.40	**4.36**	– 1	– 1	– 3
PT	1.28	1.44	**1.60**	+ 25	+ 11	+ 10
RO	3.65	4.27	**4.24**	+ 16	– 1	+ 0
SE	5.21	5.12	**5.33**	+ 2	+ 4	+ 0
SI	—	—	—	—	—	—
SK	—	—	—	—	—	—



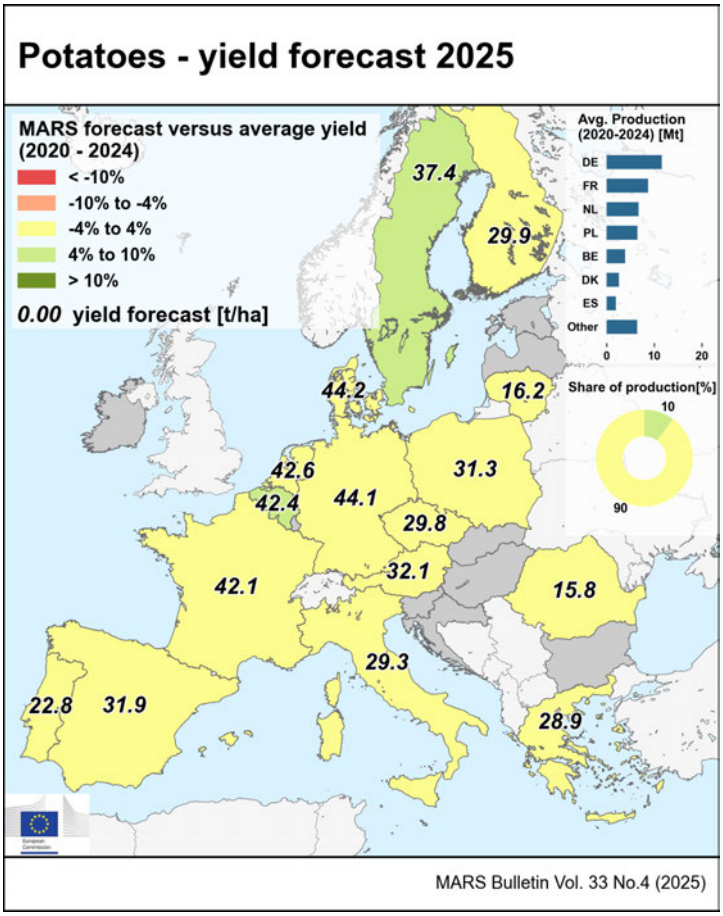
Country	Rape and turnip rape (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	3.16	2.93	**3.17**	+ 0	+ 8	– 1
AT	3.13	2.98	**3.27**	+ 5	+ 10	+ 0
BE	—	—	—	—	—	—
BG	2.49	2.46	**2.58**	+ 3	+ 5	+ 3
CY	—	—	—	—	—	—
CZ	3.20	2.77	**3.07**	– 4	+ 11	+ 0
DE	3.61	3.34	**3.60**	– 0	+ 8	– 2
DK	4.03	3.87	**4.23**	+ 5	+ 9	+ 0
EE	2.34	1.59	**2.34**	– 0	+ 46	+ 0
EL	—	—	—	—	—	—
ES	2.19	2.52	**2.60**	+ 19	+ 3	+ 4
FI	1.30	1.33	**1.38**	+ 6	+ 3	+ 0
FR	3.21	2.91	**3.17**	– 1	+ 9	– 2
HR	2.79	2.96	**2.86**	+ 2	– 3	+ 2
HU	2.81	2.57	**2.92**	+ 4	+ 14	+ 1
IE	4.48	3.94	**4.80**	+ 7	+ 22	+ 2
IT	2.81	2.72	**2.82**	+ 0	+ 4	+ 3
LT	2.82	2.63	**3.07**	+ 9	+ 17	+ 0
LU	—	—	—	—	—	—
LV	2.53	2.06	**2.62**	+ 3	+ 27	+ 0
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	3.28	3.23	**3.21**	– 2	– 1	– 2
PT	—	—	—	—	—	—
RO	2.60	2.25	**2.81**	+ 8	+ 25	+ 1
SE	3.10	2.99	**3.33**	+ 8	+ 12	+ 0
SI	—	—	—	—	—	—
SK	3.12	2.75	**2.98**	– 5	+ 8	– 5



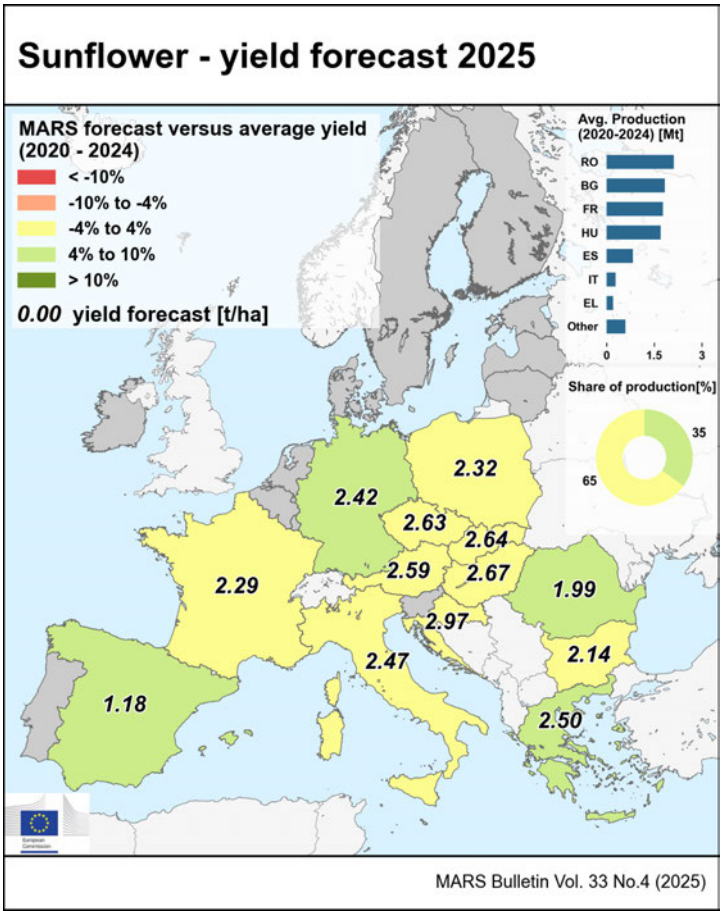
Country	Sugar beet (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	73.6	N/A	**77.9**	+ 6	N/A	+ 0
AT	78.8	79.9	**78.9**	+ 0	– 1	+ 0
BE	83.1	75.4	**87.4**	+ 5	+ 16	+ 0
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	66.8	69.6	**67.1**	+ 1	– 3	+ 0
DE	78.3	83.9	**82.3**	+ 5	– 2	+ 0
DK	75.8	77.0	**77.8**	+ 3	+ 1	+ 0
EE	—	—	—	—	—	—
EL	—	—	—	—	—	—
ES	84.0	83.6	**85.3**	+ 1	+ 2	+ 0
FI	40.9	47.6	**41.0**	+ 0	– 14	+ 0
FR	77.0	79.1	**83.6**	+ 9	+ 6	+ 0
HR	—	—	—	—	—	—
HU	55.6	50.5	**60.9**	+ 9	+ 21	+ 0
IE	—	—	—	—	—	—
IT	57.4	N/A	**64.1**	+ 12	N/A	+ 0
LT	66.3	69.9	**69.4**	+ 5	– 1	+ 0
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	82.5	75.5	**86.5**	+ 5	+ 15	+ 0
PL	63.5	66.4	**68.1**	+ 7	+ 3	– 0
PT	—	—	—	—	—	—
RO	34.8	33.5	**33.2**	– 5	– 1	+ 2
SE	67.8	74.4	**71.8**	+ 6	– 4	+ 0
SI	—	—	—	—	—	—
SK	60.4	59.0	**62.3**	+ 3	+ 6	+ 0



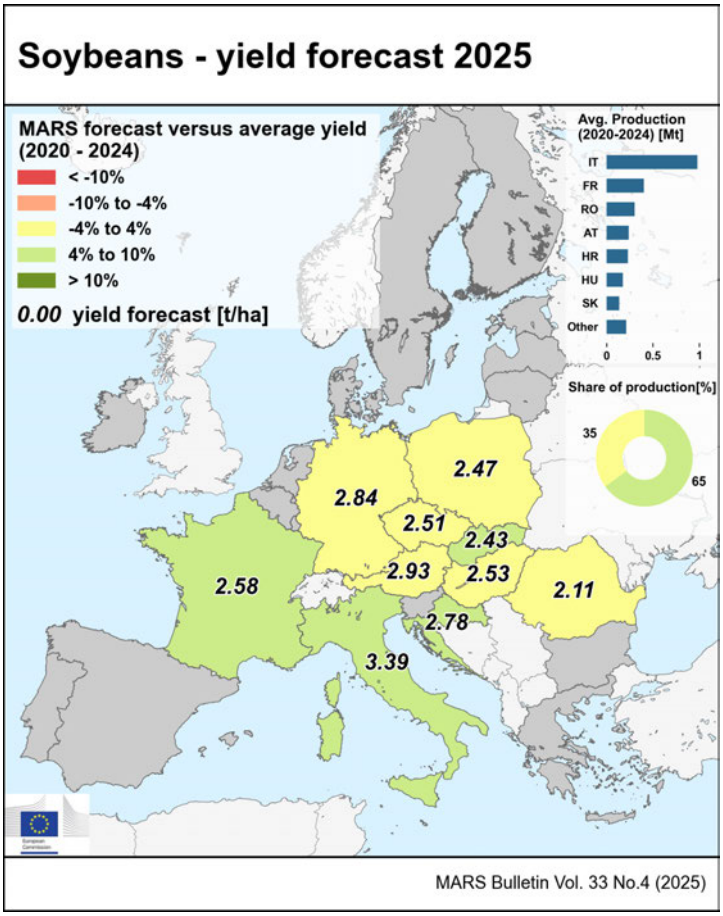
Country	Potatoes (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	36.4	36.7	**37.4**	+ 3	+ 2	+ 0
AT	32.8	31.7	**32.1**	– 2	+ 1	+ 0
BE	40.7	39.2	**42.4**	+ 4	+ 8	+ 0
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	29.0	28.8	**29.8**	+ 3	+ 3	+ 0
DE	43.1	45.0	**44.1**	+ 2	– 2	+ 0
DK	44.0	44.2	**44.2**	+ 0	– 0	+ 0
EE	—	—	—	—	—	—
EL	28.7	25.9	**28.9**	+ 1	+ 12	+ 0
ES	31.6	29.8	**31.9**	+ 1	+ 7	– 1
FI	29.4	31.2	**29.9**	+ 2	– 4	+ 0
FR	41.1	41.9	**42.1**	+ 3	+ 0	+ 0
HR	—	—	—	—	—	—
HU	—	—	—	—	—	—
IE	—	—	—	—	—	—
IT	28.9	28.8	**29.3**	+ 1	+ 2	+ 0
LT	15.9	18.1	**16.2**	+ 2	– 10	+ 0
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	42.2	41.7	**42.6**	+ 1	+ 2	– 1
PL	31.2	30.2	**31.3**	+ 0	+ 4	+ 0
PT	23.0	22.0	**22.8**	– 1	+ 3	+ 0
RO	15.4	12.5	**15.8**	+ 3	+ 26	+ 0
SE	35.8	35.6	**37.4**	+ 4	+ 5	+ 0
SI	—	—	—	—	—	—
SK	—	—	—	—	—	—



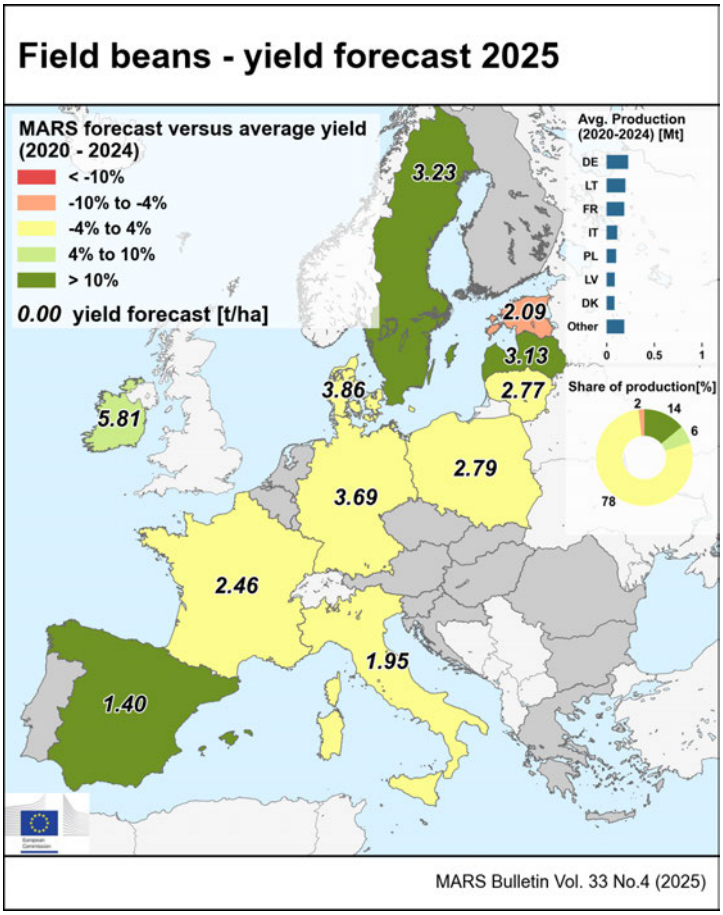
Country	Sunflower (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	2.02	1.72	**2.09**	+ 4	+ 21	+ 0
AT	2.56	2.36	**2.59**	+ 1	+ 10	+ 0
BE	—	—	—	—	—	—
BG	2.10	1.73	**2.14**	+ 2	+ 23	+ 0
CY	—	—	—	—	—	—
CZ	2.65	2.63	**2.63**	– 1	+ 0	+ 0
DE	2.29	2.61	**2.42**	+ 6	– 7	+ 0
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	2.36	2.07	**2.50**	+ 6	+ 21	+ 0
ES	1.12	1.12	**1.18**	+ 5	+ 5	– 1
FI	—	—	—	—	—	—
FR	2.26	1.95	**2.29**	+ 1	+ 18	+ 0
HR	2.92	2.97	**2.97**	+ 2	+ 0	+ 0
HU	2.58	2.67	**2.67**	+ 3	– 0	+ 0
IE	—	—	—	—	—	—
IT	2.46	2.59	**2.47**	+ 1	– 4	+ 0
LT	—	—	—	—	—	—
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.37	2.42	**2.32**	– 2	– 4	+ 0
PT	—	—	—	—	—	—
RO	1.86	1.18	**1.99**	+ 7	+ 68	+ 0
SE	—	—	—	—	—	—
SI	—	—	—	—	—	—
SK	2.55	2.49	**2.64**	+ 3	+ 6	+ 0



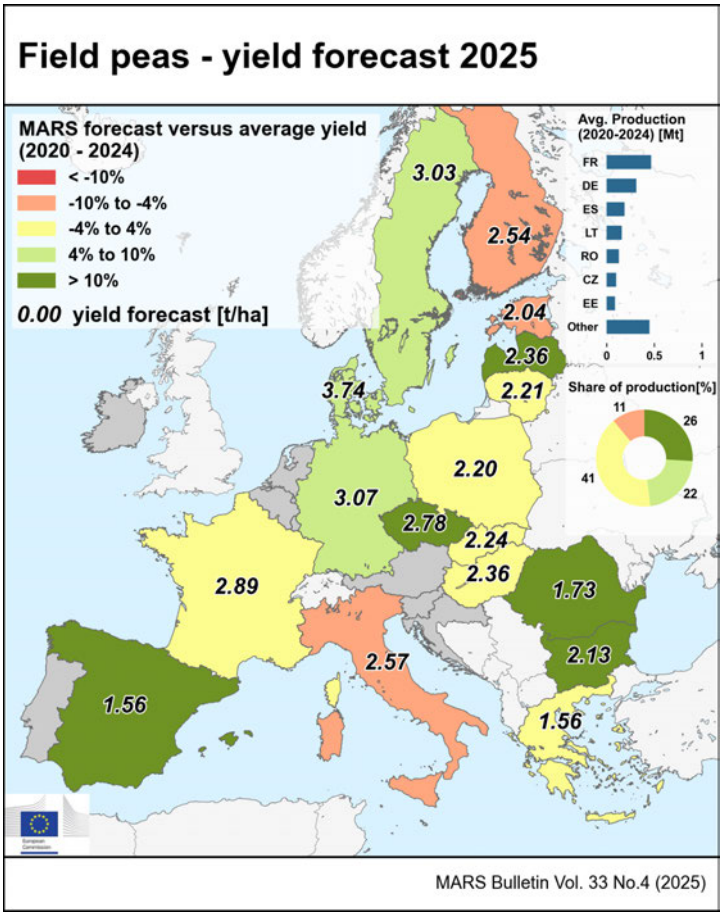
Country	Soybeans (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	2.67	2.69	**2.82**	+ 6	+ 5	– 0
AT	2.88	2.74	**2.93**	+ 2	+ 7	+ 0
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	2.42	2.48	**2.51**	+ 4	+ 1	+ 0
DE	2.83	3.25	**2.84**	+ 1	– 13	+ 0
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	—	—	—	—	—	—
ES	—	—	—	—	—	—
FI	—	—	—	—	—	—
FR	2.40	2.60	**2.58**	+ 7	– 1	+ 0
HR	2.61	2.48	**2.78**	+ 7	+ 12	+ 0
HU	2.47	2.23	**2.53**	+ 3	+ 13	– 6
IE	—	—	—	—	—	—
IT	3.19	3.21	**3.39**	+ 6	+ 6	+ 0
LT	—	—	—	—	—	—
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.42	2.50	**2.47**	+ 2	– 1	+ 0
PT	—	—	—	—	—	—
RO	2.07	2.03	**2.11**	+ 2	+ 4	– 1
SE	—	—	—	—	—	—
SI	—	—	—	—	—	—
SK	2.29	2.49	**2.43**	+ 6	– 3	+ 0



Country	Field beans (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	2.77	2.92	**2.83**	+ 2	– 3	+ 0
AT	—	—	—	—	—	—
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	—	—	—	—	—	—
DE	3.68	3.96	**3.69**	+ 0	– 7	+ 0
DK	3.86	3.97	**3.86**	– 0	– 3	+ 0
EE	2.29	2.90	**2.09**	– 9	– 28	+ 0
EL	—	—	—	—	—	—
ES	1.17	1.42	**1.40**	+ 19	– 1	+ 9
FI	—	—	—	—	—	—
FR	2.41	2.70	**2.46**	+ 2	– 9	+ 0
HR	—	—	—	—	—	—
HU	—	—	—	—	—	—
IE	5.40	5.60	**5.81**	+ 8	+ 4	+ 0
IT	1.95	2.11	**1.95**	+ 0	– 8	+ 0
LT	2.75	2.59	**2.77**	+ 1	+ 7	+ 0
LU	—	—	—	—	—	—
LV	2.82	3.13	**3.13**	+ 11	– 0	+ 0
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.80	2.74	**2.79**	– 0	+ 2	+ 0
PT	—	—	—	—	—	—
RO	—	—	—	—	—	—
SE	2.91	3.18	**3.23**	+ 11	+ 1	+ 0
SI	—	—	—	—	—	—
SK	—	—	—	—	—	—



Country	Field peas (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff May/April
EU	2.22	2.07	**2.33**	+ 5	+ 13	+ 1
AT	—	—	—	—	—	—
BE	—	—	—	—	—	—
BG	1.90	1.59	**2.13**	+ 12	+ 34	+ 0
CY	—	—	—	—	—	—
CZ	2.39	1.81	**2.78**	+ 16	+ 54	+ 12
DE	2.92	2.91	**3.07**	+ 5	+ 6	+ 0
DK	3.49	2.98	**3.74**	+ 7	+ 25	+ 0
EE	2.25	2.37	**2.04**	– 9	– 14	+ 0
EL	1.56	1.48	**1.56**	+ 0	+ 6	– 0
ES	1.20	1.33	**1.56**	+ 30	+ 17	+ 19
FI	2.65	2.76	**2.54**	– 4	– 8	+ 0
FR	2.91	2.83	**2.89**	– 1	+ 2	+ 0
HR	—	—	—	—	—	—
HU	2.32	2.35	**2.36**	+ 2	+ 0	+ 0
IE	—	—	—	—	—	—
IT	2.78	2.58	**2.57**	– 7	– 0	+ 0
LT	2.17	2.20	**2.21**	+ 2	+ 1	+ 0
LU	—	—	—	—	—	—
LV	2.11	2.23	**2.36**	+ 12	+ 6	+ 0
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.19	2.23	**2.20**	+ 0	– 1	+ 0
PT	—	—	—	—	—	—
RO	1.45	1.01	**1.73**	+ 19	+ 71	+ 1
SE	2.86	2.88	**3.03**	+ 6	+ 5	+ 0
SI	—	—	—	—	—	—
SK	2.23	1.52	**2.24**	+ 0	+ 47	+ 0



Country	Wheat (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
DZ	1.53	1.52	**1.60**	+ 5	+ 5
MA	1.58	1.39	**1.47**	– 7	+ 6
TN	1.95	1.81	**2.21**	+ 13	+ 22
TR	2.97	3.00	**3.02**	+ 2	+ 1
UA	4.26	4.53	**4.31**	+ 1	– 5

Country	Barley (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
DZ	1.13	1.17	**1.24**	+ 9	+ 6
MA	1.01	0.95	**0.88**	– 13	– 7
TN	1.09	1.23	**1.65**	+ 52	+ 34
TR	2.49	2.49	**2.58**	+ 4	+ 4
UA	3.54	3.99	**3.60**	+ 2	– 10

Country	Grain maize (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
DZ	—	—	—	—	—
MA	—	—	—	—	—
TN	—	—	—	—	—
TR	9.46	10.3	**10.4**	+ 10	+ 2
UA	6.76	6.43	**6.91**	+ 2	+ 8

Country	Soybean (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
DZ	—	—	—	—	—
MA	—	—	—	—	—
TN	—	—	—	—	—
TR	—	—	—	—	—
UA	2.37	2.30	**2.50**	+ 6	+ 9

NB: Yields are forecast for crops with more than 10 000 ha per country with sufficently long and coherent yield time series.

Sources: 2020-2025 data come from DG Agriculture and Rural Development short-term-outlook data (dated April 2025, received on 22.04.2025), Eurostat Eurobase (last update: 07.05.2025), ELSTAT, Statistics Netherlands (CBS) and EES (until 2017).

Non-EU 2020-2024 data come from USDA, INRA Maroc, ONICL Maroc, Ministère de l'agriculture des ressources hydrauliques et de la pêche Tunisie, MED-Amin baseline DB, DSASI-MADR Algeria, Turkish Statistical Institute (TurkStat), Eurostat Eurobase (last update: 07.05.2025), Ministry for Development of Economy, Trade and Agriculture of Ukraine, FAO and PSD-online.

2025 yields come from MARS Crop Yield Forecasting System (output up to 20.05.2025).

The EU aggregate is reported after 1.2.2020.

N/A = Data not available.

The column header '%25/5yrs' stands for the 2025 change with respect to the 5-year average(%). Similarly, '%25/24' stands for the 2025 change with respect to 2024(%).

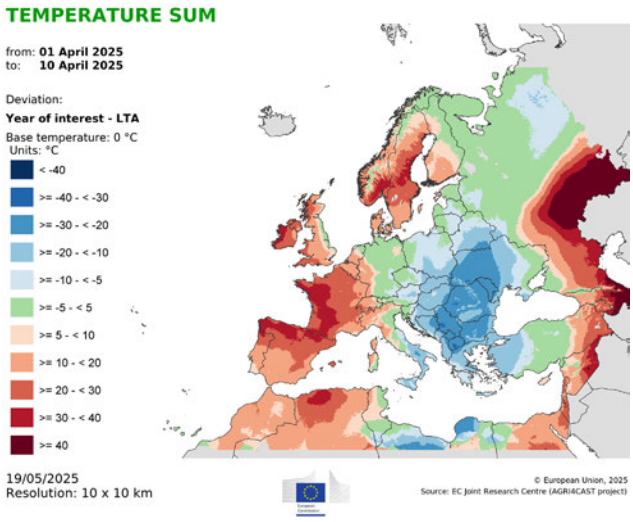
* Due to a change in the definition to distinguish spring and winter barley in Spain, the "5-year average" for this country is based only on data for 2023 and 2024. The 2025 area is based on the average of the reported area from 2023 and 2024. See text box accompanying the text on Spain and Portugal section in the March bulletin (Vol. 33, No. 2) for additional information.

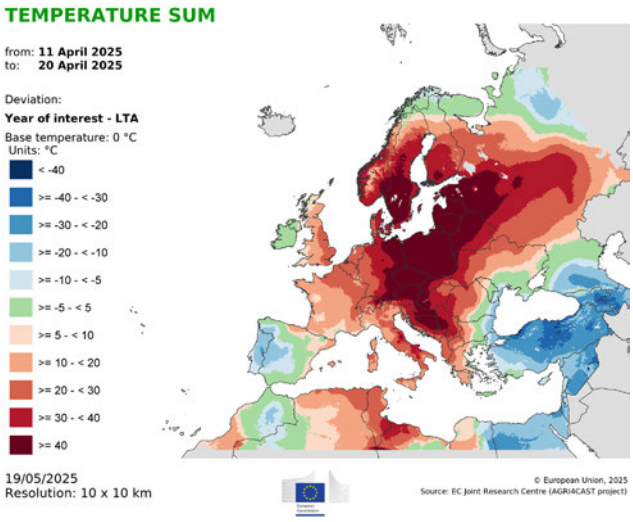
Cop name	Eurostat Crop name	Eurostat Crop Code	Official Eurostat Crop definition*
Total wheat	Wheat and spelt	C1100	Common wheat (*Triticum aestivum* L. emend. Fiori et Paol.), spelt (*Triticum spelta* L.), einkorn wheat (*Triticum monococcum* L.) and durum wheat (*Triticum durum* Desf.).
Total barley	Barley	C1300	Barley (*Hordeum vulgare* L.).
Soft wheat	Common wheat and spelt	C1110	Common wheat (*Triticum aestivum* L. emend. Fiori et Paol.), spelt (*Triticum spelta* L.) and einkorn wheat (*Triticum monococcum* L.).
Durum what	Durum wheat	C1120	*Triticum durum* Desf.
Spring barley	Spring barley	C1320	Barley (*Hordeum vulgare* L.) sown in the spring.
Winter barley	Winter barley	C1310	Barley (*Hordeum vulgare* L.) sown before or during winter.
Grain maize	Grain maize and corn-cob-mix	C1500	Maize (*Zea mays* L.) harvested for grain, as seed or as corn-cob-mix.
Green maize	Green maize	G3000	All forms of maize (*Zea mays* L.) grown mainly for silage (whole cob, parts of or whole plant) and not harvested for grain.
Rye	Rye and winter cereal mixtures (maslin)	C1200	Rye (*Secale cereale* L.) sown any time, mixtures of rye and other cereals and other cereal mixtures sown before or during the winter (maslin).
Triticale	Triticale	C1600	Triticale (x *Triticosecale* Wittmack).
Rape and turnip rape	Rape and turnip rape seeds	I1110	Rape (*Brassica napus* L.) and turnip rape (*Brassica rapa* L. var. oleifera (Lam.)) grown for the production of oil, harvested as dry grains.
Sugar beet	Sugar beet (excluding seed)	R2000	Sugar beet (*Beta vulgaris* L.) intended for the sugar industry, alcohol production or renewable energy production.
Potatoes	Potatoes (including seed potatoes)	R1000	Potatoes (*Solanum tuberosum* L.).
Sunflower	Sunflower seed	I1120	Sunflower (*Helianthus annuus* L.) harvested as dry grains.
Soybeans	Soya	I1130	Soya (*Glycine max* L. Merril) harvested as dry grains.
Field beans	Broad and field beans	P1200	All varieties of broad and field beans (Faba vulgaris (Moench) syn. Vicia faba L. (partim)) harvested dry for grain, including seed.
Field peas	Field peas	P1100	All varieties of field peas (Pisum sativum L. convar. sativum or Pisum sativum L. convar. arvense L. or convar. speciosum) harvested dry for grain, including seed.
Rice	Rice	C2000	Rice (*Oryza sativa*, L.).

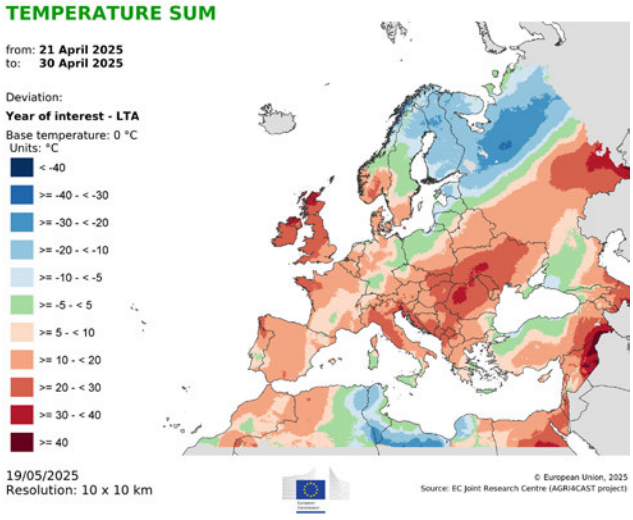
** Source:* Eurostat - Annual crop statistics (Handbook 2020 Edition)

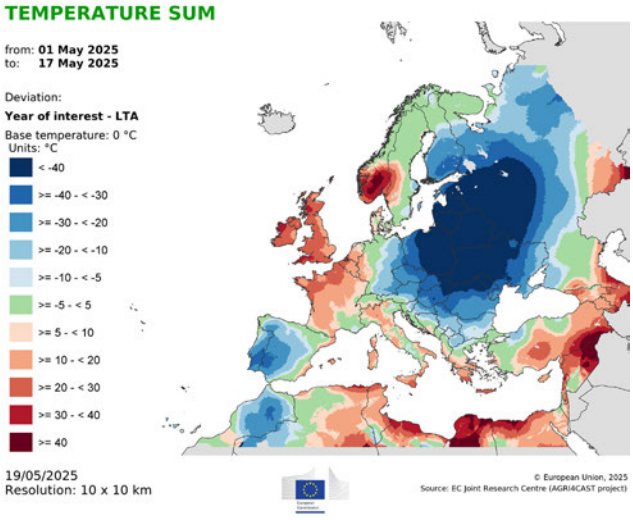
6. Atlas

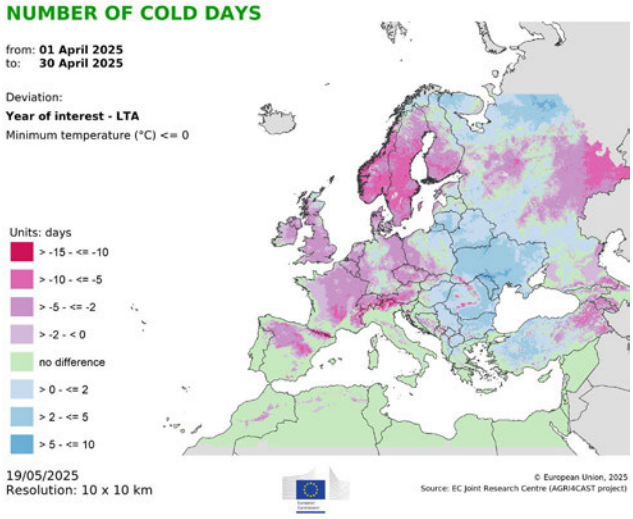
Temperature regime

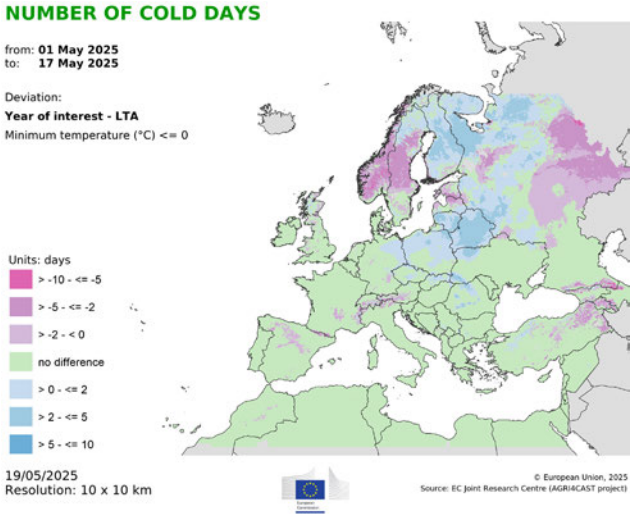


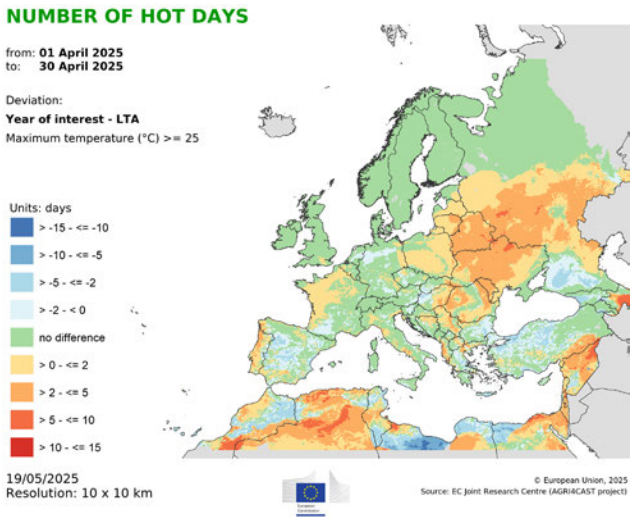


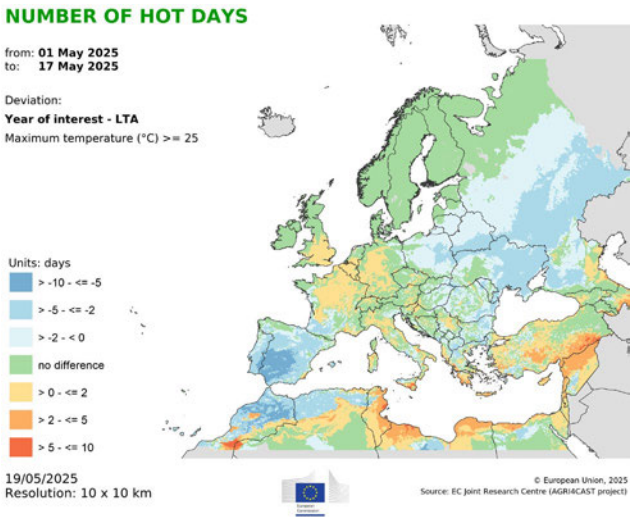




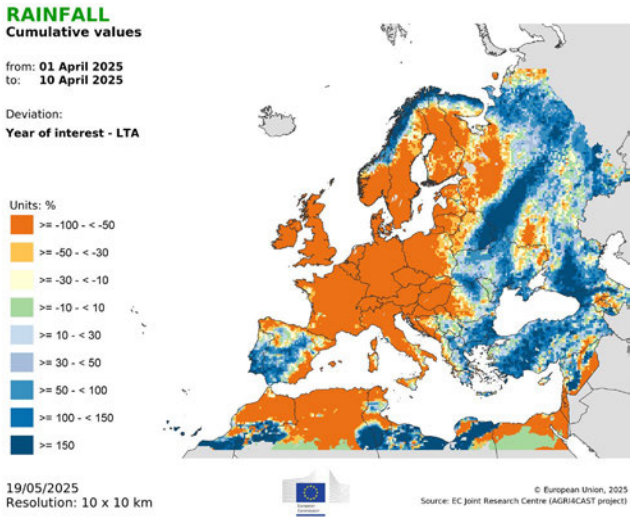


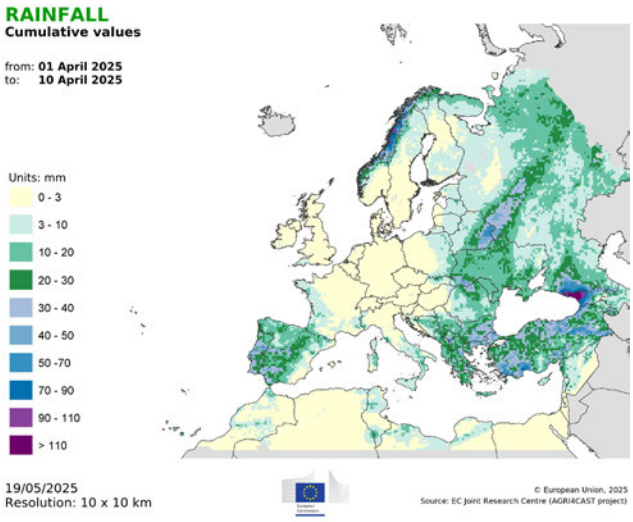


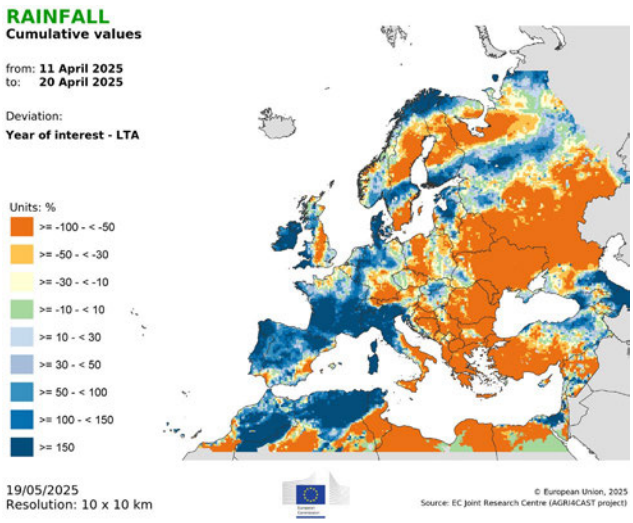


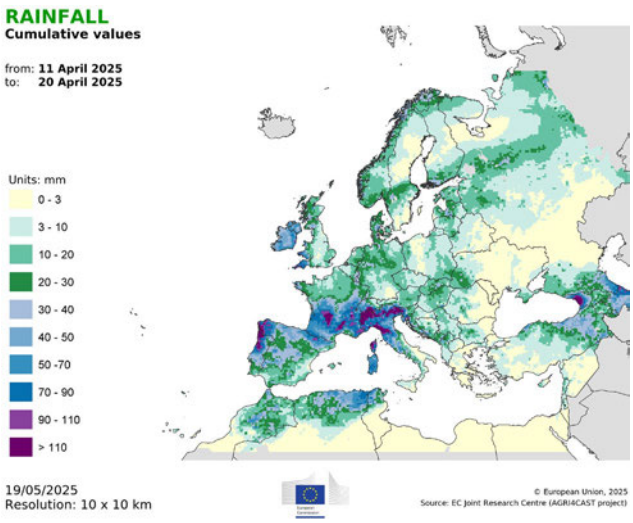


Precipitation







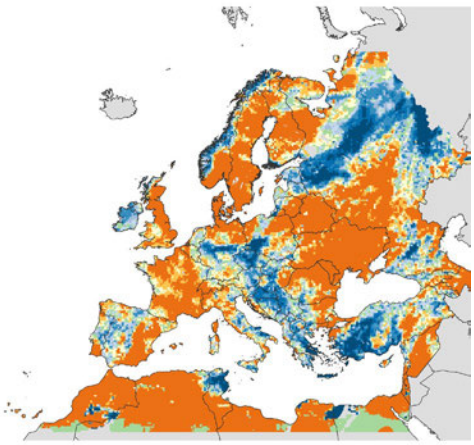


RAINFALL
Cumulative values

from: **21 April 2025**
to: **30 April 2025**

Deviation:
Year of interest - LTA

Units: %
- >= -100 - < -50
- >= -50 - < -30
- >= -30 - < -10
- >= -10 - < 10
- >= 10 - < 30
- >= 30 - < 50
- >= 50 - < 100
- >= 100 - < 150
- >= 150

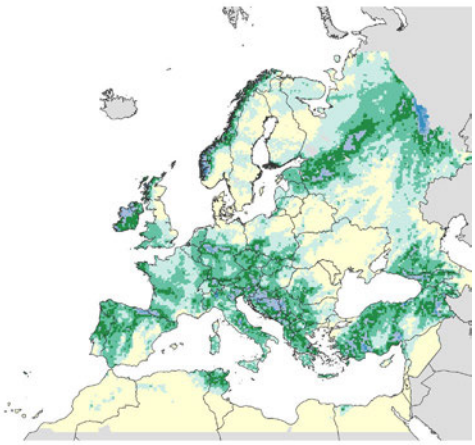


19/05/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

from: **21 April 2025**
to: **30 April 2025**

Units: mm
- 0 - 3
- 3 - 10
- 10 - 20
- 20 - 30
- 30 - 40
- 40 - 50
- 50 -70
- 70 - 90



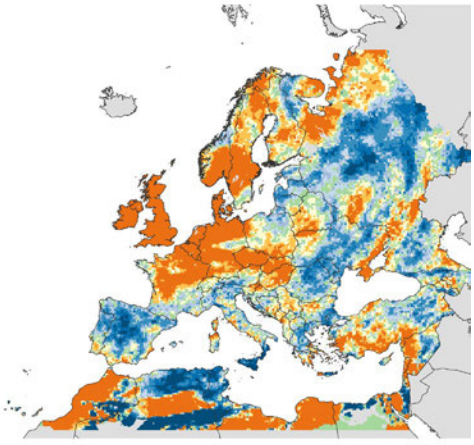
19/05/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

from: **01 May 2025**
to: **17 May 2025**

Deviation:
Year of interest - LTA

Units: %
- >= -100 - < -50
- >= -50 - < -30
- >= -30 - < -10
- >= -10 - < 10
- >= 10 - < 30
- >= 30 - < 50
- >= 50 - < 100
- >= 100 - < 150
- >= 150

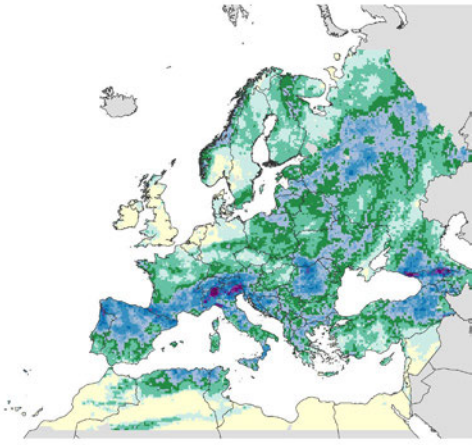


19/05/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

from: **01 May 2025**
to: **17 May 2025**

Units: mm
- 0 - 3
- 3 - 10
- 10 - 20
- 20 - 30
- 30 - 40
- 40 - 50
- 50 -70
- 70 - 90
- 90 - 110
- > 110



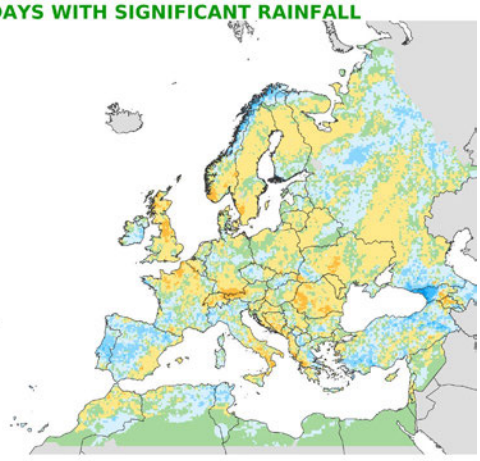
19/05/2025
Resolution: 10 x 10 km

NUMBER OF DAYS WITH SIGNIFICANT RAINFALL

from: **01 April 2025**
to: **30 April 2025**

Deviation:
Year of interest - LTA
Rain (mm) > 5

Units: days
- >=10 - <15
- >=5 - <10
- >=2 - <5
- >=1 - <2
- no difference
- >=-2 - <-1
- >=-5 - <-2
- >=-10 - <-5



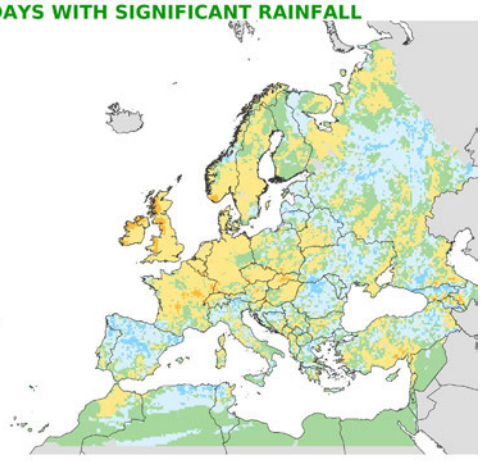
19/05/2025
Resolution: 10 x 10 km

NUMBER OF DAYS WITH SIGNIFICANT RAINFALL

from: **01 May 2025**
to: **17 May 2025**

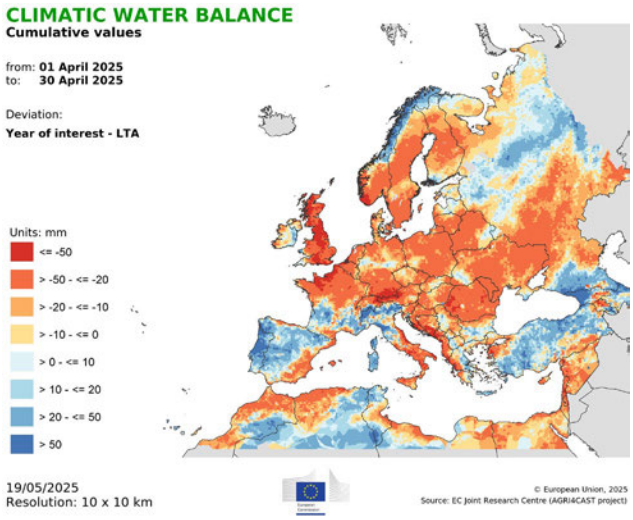
Deviation:
Year of interest - LTA
Rain (mm) > 5

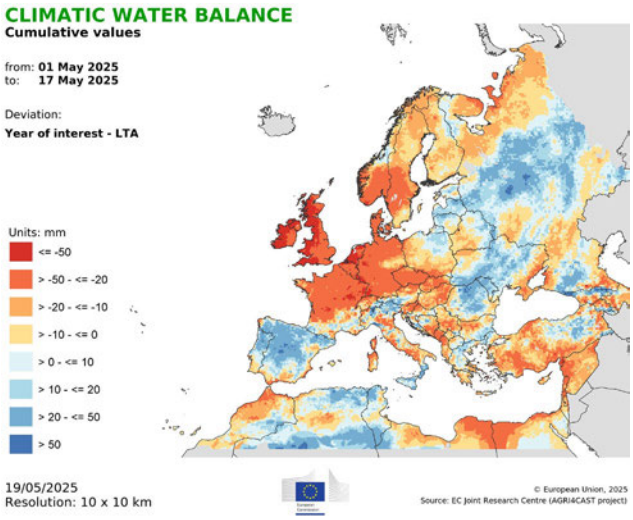
Units: days
- >=5 - <10
- >=2 - <5
- >=1 - <2
- no difference
- >=-2 - <-1
- >=-5 - <-2



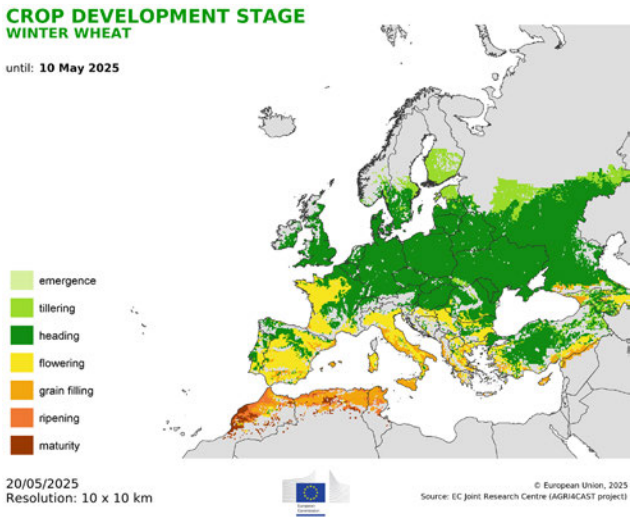
19/05/2025
Resolution: 10 x 10 km

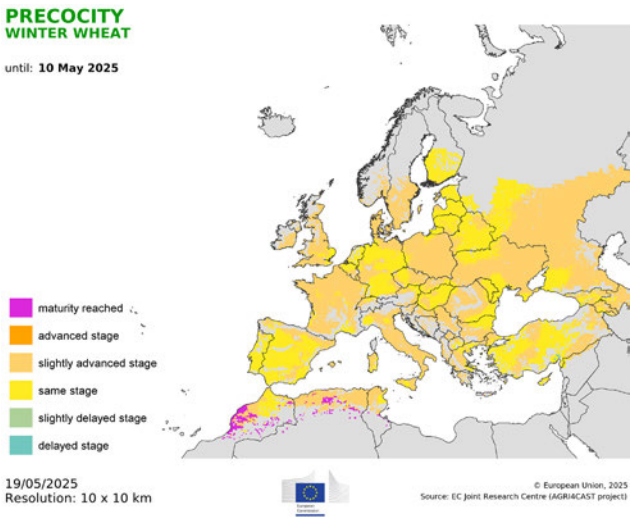
Climatic water balance

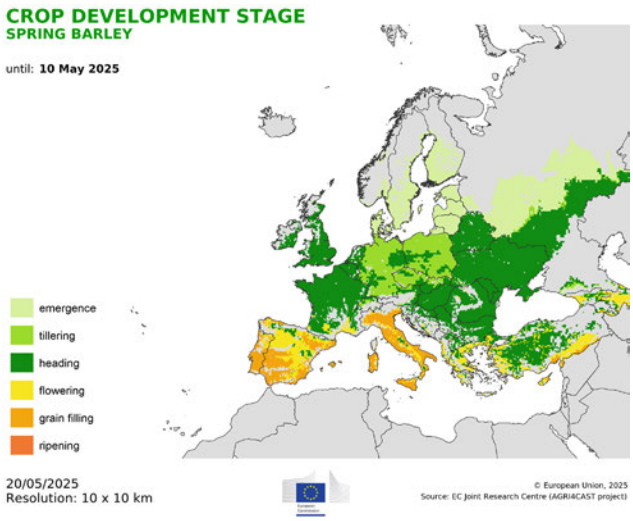


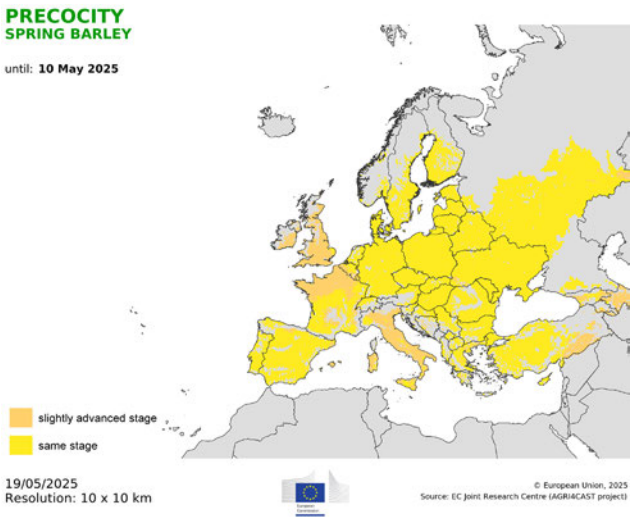


Crop development stages and precocity

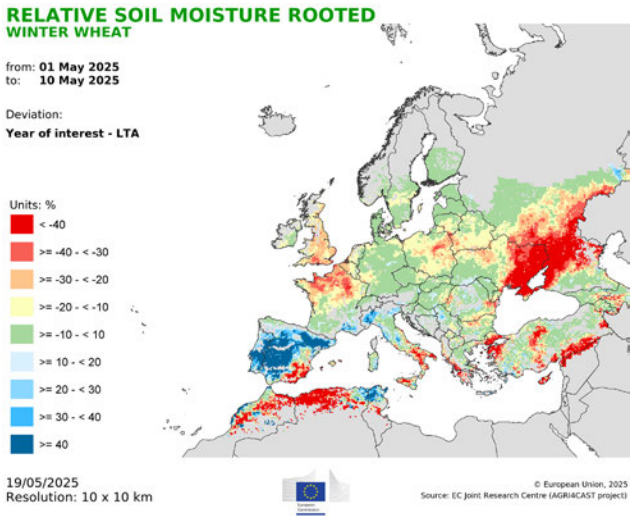


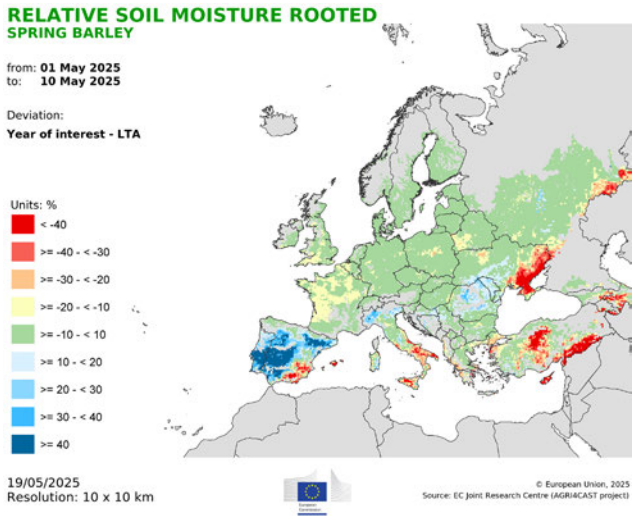




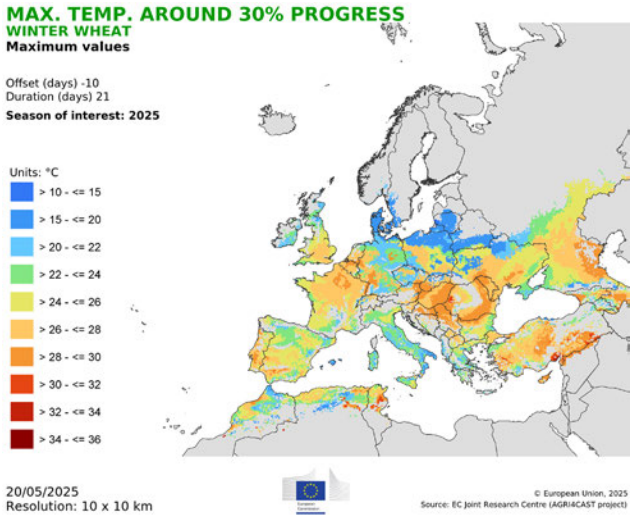


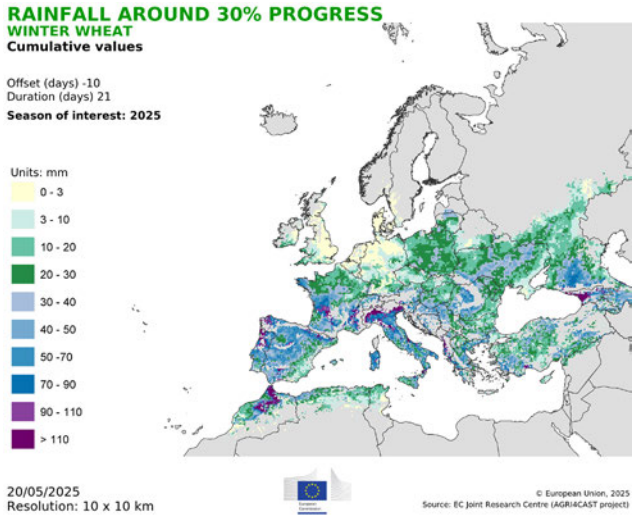
Relative soil moisture





Maximum temperature and precipitation around crops development





JRC MARS Bulletin 2025

Date	Publication	Reference
24 FEB	Agro-meteo incl. frost-kill analysis, extended Maghreb section	Vol. 33 No 1
24 MAR	Agro-meteo incl. frost-kill & country analysis, yield forecasts	Vol. 33 No 2
22 APR	Agro-meteo & country analysis, yield forecasts, sowing conditions, remote sensing & grassland update, extended Türkiye section	Vol. 33 No 3
26 MAY	Agro-meteo & country analysis, yield forecasts, sowing conditions, remote sensing & grassland update, extended Maghreb section	Vol. 33 No 4
23 JUN	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update, rice analysis	Vol. 33 No 5
21 JUL	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update	Vol. 33 No 6
25 AUG	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update	Vol. 33 No 7
22 SEP	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update, rice analysis, extended Türkiye section	Vol. 33 No 8
27 OCT	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update, sowing conditions	Vol. 33 No 9
24 NOV	Agro-meteo analysis, sowing conditions	Vol. 33 No 10

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Analysis and reports
Ben Aoun, W., Biavetti, I., Bussay, A., Cerrani, I., Claverie, M., De Palma, P., Fumagalli, D., Henin, R., Luque Reyes, J., Morel, J., Niemeyer, S., Nisini, L., Ozalp, O., Panarello, L., Rossi, M., Seguini, L., Tarnavsky, E., Thiemig, V., Todoroff, P., Zucchini, A.

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Technical note
The long-term average (LTA) used within this Bulletin as a reference is calculated on the basis of weather data from 1991-2024. The medium-term average (MTA) used within this Bulletin as a reference is calculated on the basis of weather data from 2015-2024.

Mission statement
The Joint Research Centre provides independent, evidence-based knowledge and science, supporting EU policies to positively impact society.

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