Issued: 22 September 2025
JRC MARS Bulletin Vol. 33 No 8

European Commission

JRC MARS Bulletin

Crop monitoring in Europe

September 2025

Summer drought reduces yields in south-east Europe

Rice promising at the EU level, negative outlook in Türkiye

The September 2025 *JRC MARS Bulletin* confirms that drought and repeated heatwaves during summer in south-eastern Europe have led to irreversible yield losses in Hungary, Romania, Bulgaria and parts of Türkiye. Summer crops such as maize and sunflower are most affected, with forecasts well below the five-year average. Elsewhere, heatwaves and dry spells alternated with moderate and rainy periods, providing generally favourable crop conditions. While western and central Europe experienced mixed but stable yields, above-average harvests are expected in northern Europe. Irrigation has maintained fair crop expectations in the Iberian peninsula.

Overall prospects for rice are positive, with Italy, Spain, Portugal and France showing strong yield potential, whereas southern Spain, Bulgaria, Romania and Greece face a mediocre to poor outlook. The overall EU rice yield is forecast to reach 6 % above the five-year average.

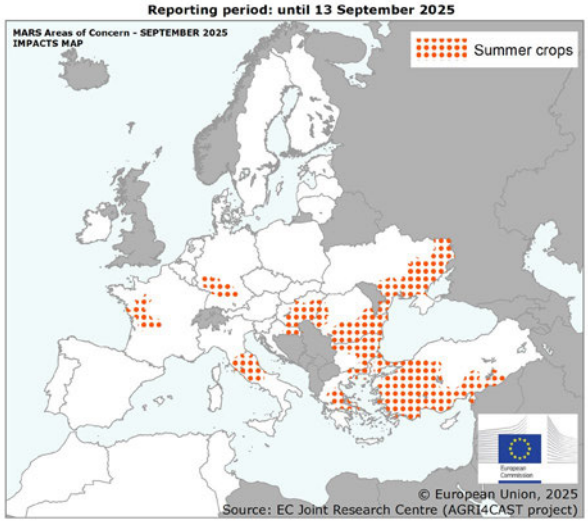
This edition features an extended section on crop monitoring and yield forecasting for Türkiye alongside an in-depth analysis of rice in Europe's main cultivating areas.

Contents:

Covers the period from 1 August until 13 September

AREAS OF CONCERN - IMPACTS

Reporting period: until 13 September 2025



Crop	Yield t/ha				
	Avg 5yrs	August Bulletin	MARS 2025 forecasts	%25/5yrs	% Diff August
Spring barley	4.66	5.01	**5.15**	+ 11	+ 3
Grain maize	7.10	6.93	**6.88**	– 3	– 1
Potatoes	36.4	36.8	**36.5**	+ 0	– 1
Sugar beet	73.6	74.6	**74.8**	+ 2	+ 0
Sunflower	2.02	1.83	**1.81**	– 10	– 1
Soybeans	2.67	2.74	**2.79**	+ 4	+ 2
Field beans	2.68	2.82	**2.79**	+ 4	– 1
Field peas	2.20	2.30	**2.32**	+ 6	+ 1
Green maize	42.5	42.6	**42.7**	+ 1	+ 0
Rice	6.31	—	**6.69**	+ 6	—

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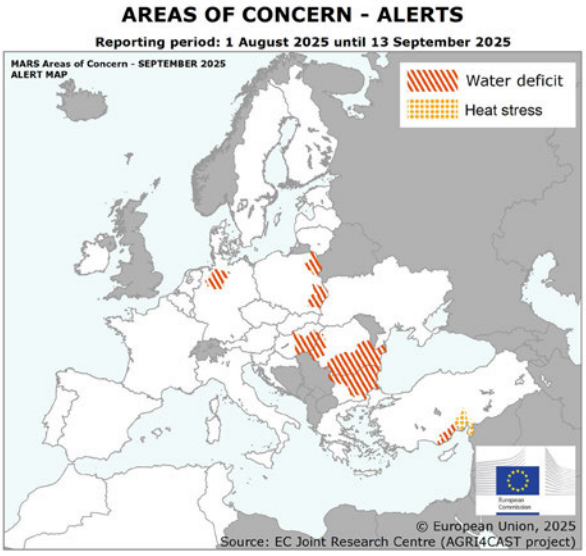
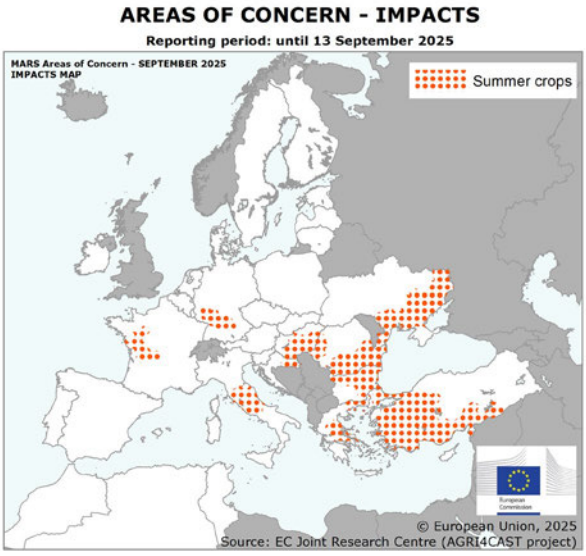
Joint Research Centre

Areas of concern





Alerts for summer crops due to dry weather

- **Northern Germany:** A prolonged rainfall deficit has reduced soil moisture, although some precipitation occurred in early September. Crops have not been strongly impacted so far, and forecasts indicate possible rainfall that could mitigate yield deterioration.
- **Easternmost Poland:** Overall conditions are favourable, but a persistent lack of precipitation in the easternmost regions has reduced green maize and sunflower yield expectations locally.
- **Eastern Hungary:** Since the beginning of summer, very low precipitation has been observed, and crop yield prospects are now deteriorating.
- **Southern Romania and Bulgaria:** Very poor summer crop growth has resulted from drought conditions exacerbated by repeated heatwaves in July and August, with very low yields expected for maize, sunflower and soybean.
- **Southern Türkiye:** Very high August temperatures and persistently low soil moisture could result in the further deterioration of summer crop yields.

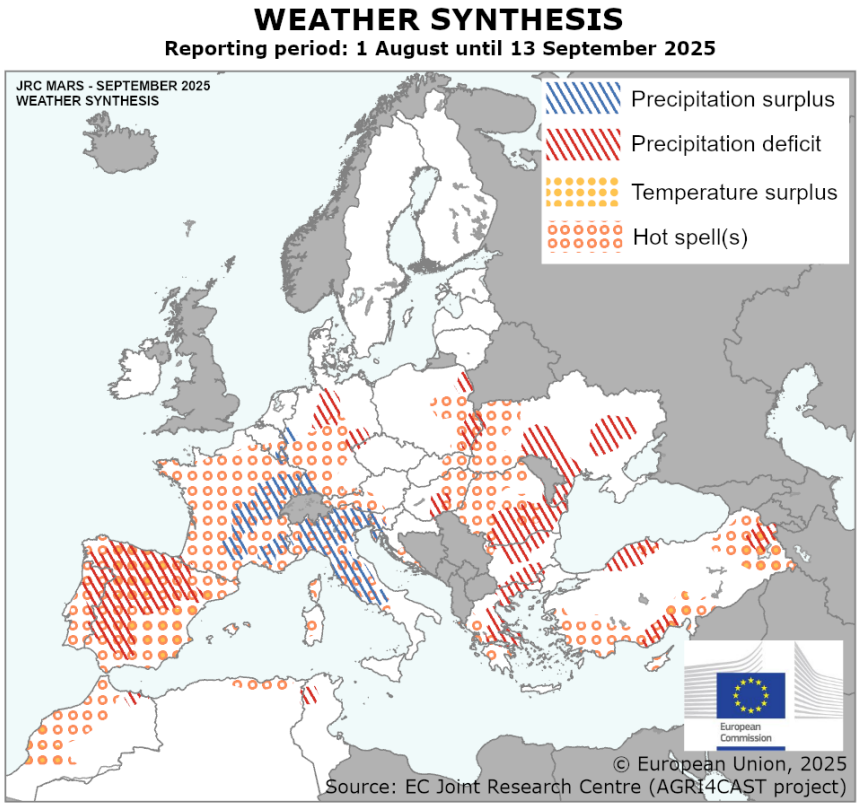
Impacts already observed in summer crops

- **Eastern Hungary, southern Romania, Bulgaria and the very easternmost part of Croatia:** The very poor summer crop growth in these regions is linked to drought conditions that are still ongoing.
- **Western France:** Hot and dry conditions at the beginning of August accelerated the senescence phase of summer crops.
- **Southern Germany:** Pest presence in June and July constrained sugar beet growth.
- **Central Italy:** Unfavourable July conditions reduced sunflower yield outlook.
- **Central Greece:** The lack of rainfall and poor replenishment of reservoirs continued in August, keeping yield expectations low.
- **Türkiye and southern and eastern Ukraine:** Prolonged very hot and dry summer conditions caused below-average summer crop development that the moderate weather of the past week could not sufficiently mitigate.

1. Agrometeorological overview

1.1 Meteorological review (1 August – 13 September)

Unsettled weather patterns brought above-average temperatures and drier-than-usual conditions across most of Europe, while the Alps and surrounding regions experienced above-average precipitation.



The weather synthesis map summarises the most distinct anomalies during the reporting period compared with the 1991–2024 long-term average (LTA). Precipitation deficit and surplus are absolute and relative deviations from the LTA. Temperature surplus and deficit indicate a substantial deviation in accumulated temperature from the LTA. Cold spells are periods of at least five days with temperatures below – 2 °C and the 10th percentile, while hot spells are periods of at least five days with temperatures above 30 °C and the 90th percentile.

Hot spells occurred in an area extending from central Germany southward to central Italy, *Corse* and central *Sardegna* and westward to south-easternmost Belgium, most of France, the Iberian peninsula, the Balearic Islands, coastal Morocco and north-eastern Algeria. Hot spells were also observed in eastern Poland, Slovakia and Hungary, in western Ukraine, in most of Romania, in southern Greece and in southern central and eastern regions of Türkiye. In Türkiye, in most of Spain and in central coastal Morocco, a **temperature surplus** was observed. In these regions, average daily temperatures ranked among the three warmest since 1991 and maximum daily temperatures exceeded 30 °C on more than half of the days of the review period.

Precipitation deficit characterised most of the Iberian peninsula, parts of northern and eastern Germany, easternmost Poland and southern central Hungary, along with parts of central and southern Ukraine, southern Romania, Bulgaria, north-eastern and southern Greece, and central northern and southern regions and easternmost regions of Türkiye. Precipitation deficits were also observed locally in northern Morocco and northern Tunisia. In most of these regions, total rainfall reached no more than 30 mm, corresponding to less than half of average precipitation.

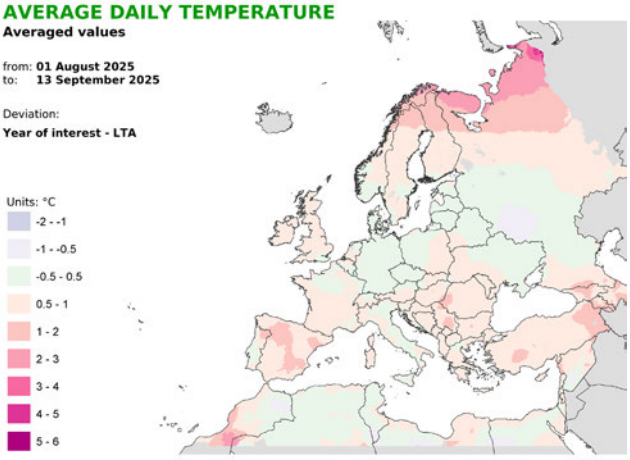
In contrast, **rainfall surplus** was observed in the broader Alps region, extending southward to central Italy and westward to most of south-eastern France, locally in western Germany (the northern *Köln* and southern *Düsseldorf* regions) and in Luxembourg. Total rainfall in these regions was up to 250 mm (locally more), corresponding to between 50 % and 150 % (locally more) above the LTA.

AVERAGE DAILY TEMPERATURE

Averaged values

from: **01 August 2025**
to: **13 September 2025**

Deviation:
Year of interest - LTA

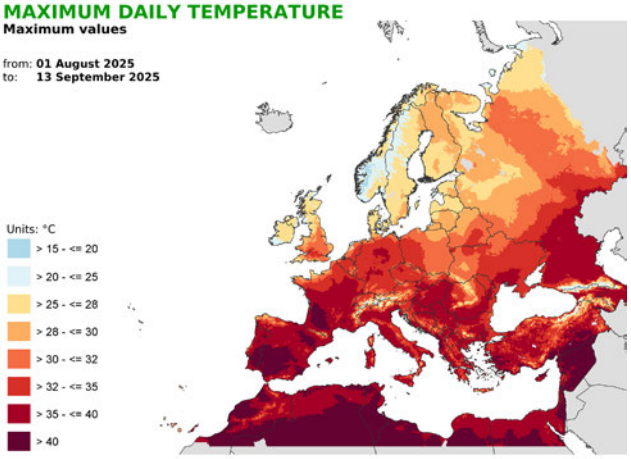


15/09/2025
Resolution: 10 x 10 km

MAXIMUM DAILY TEMPERATURE

Maximum values

from: **01 August 2025**
to: **13 September 2025**



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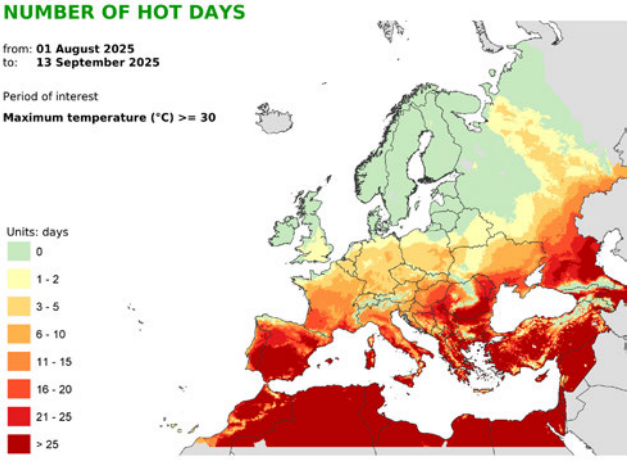
Resolution: 10 x 10 km

NUMBER OF HOT DAYS

from: **01 August 2025**
to: **13 September 2025**

Period of interest
Maximum temperature (°C) >= 30

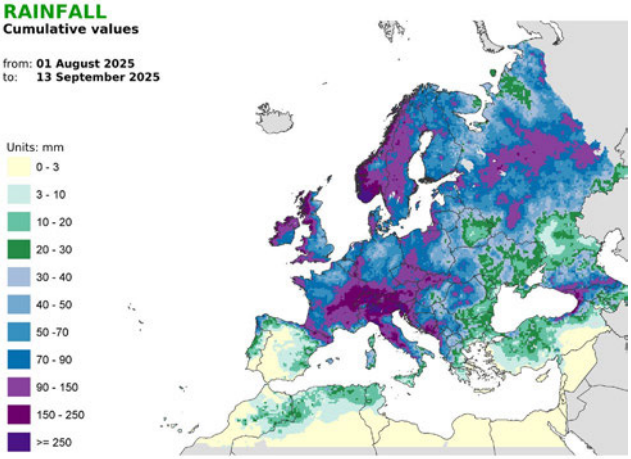


15/09/2025
Resolution: 10 x 10 km

RAINFALL

Cumulative values

from: **01 August 2025**
to: **13 September 2025**

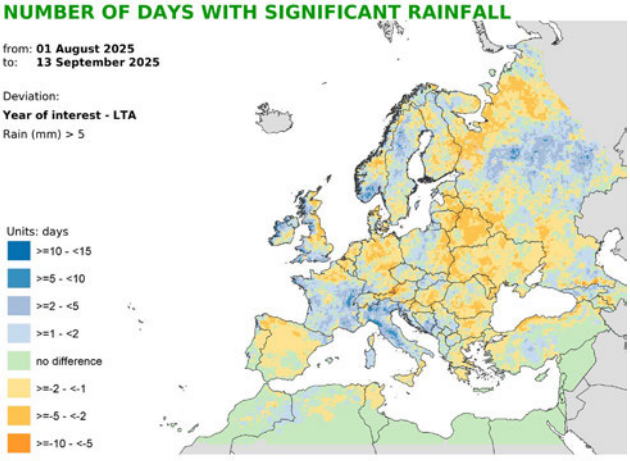


15/09/2025
Resolution: 10 x 10 km

NUMBER OF DAYS WITH SIGNIFICANT RAINFALL

from: **01 August 2025**
to: **13 September 2025**

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



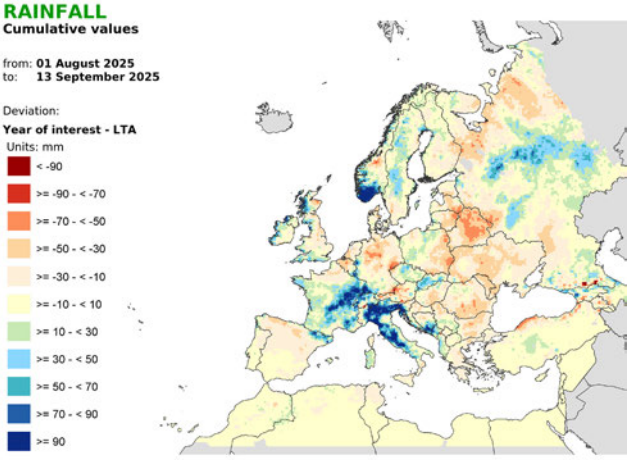
15/09/2025
Resolution: 10 x 10 km

RAINFALL

Cumulative values

from: **01 August 2025**
to: **13 September 2025**

Deviation:
Year of interest - LTA



15/09/2025
Resolution: 10 x 10 km

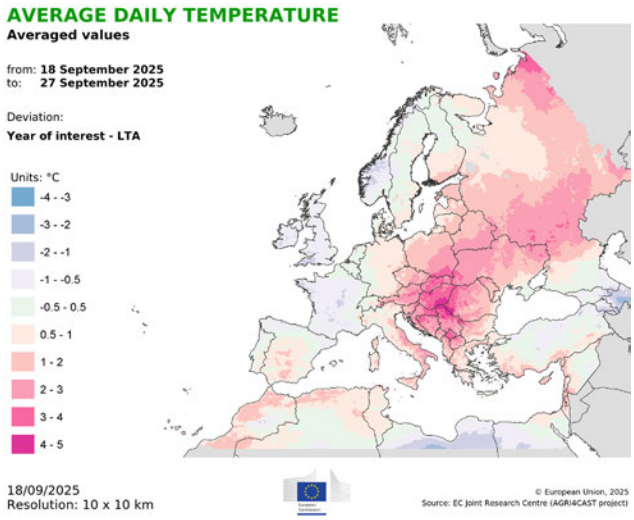
1.2 Weather forecast (18-27 September)

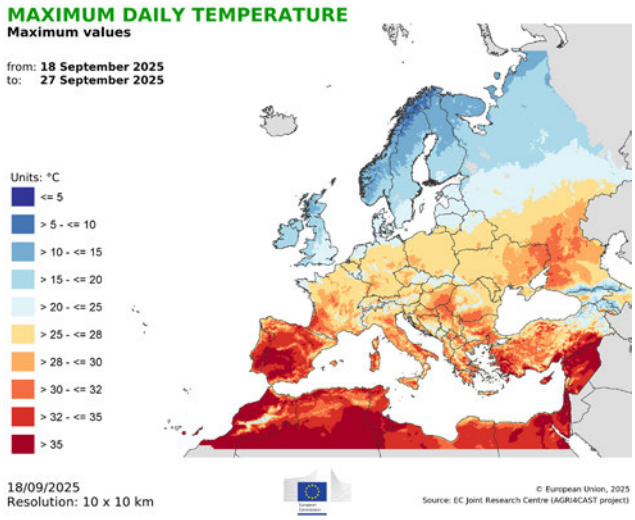
Warmer-than-usual conditions are forecast for most of Europe, while a cold front brings below-average temperatures to western Europe and substantial precipitation in western and central regions.

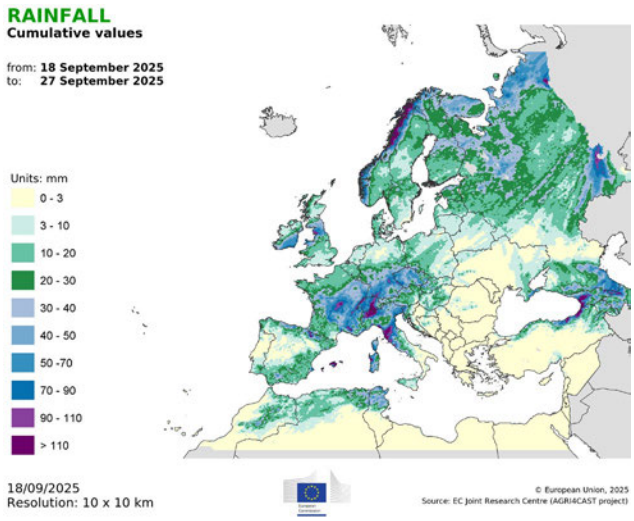
Warmer-than-usual conditions (up to 2 °C above the LTA) are forecast in most of central, eastern and south-eastern Europe, in parts of the Iberian peninsula and on the western coast of North Africa, with more distinct anomalies (up to 5 °C above the LTA) in the central Danube region. Daily maximum temperatures above 30 °C (locally above 35 °C) are forecast for most of Mediterranean Europe and North Africa. Slightly **colder-than-usual conditions**, with average daily temperatures up to 2 °C below the LTA, are forecast in Ireland, most of France, northern Spain and northern and eastern Türkiye.

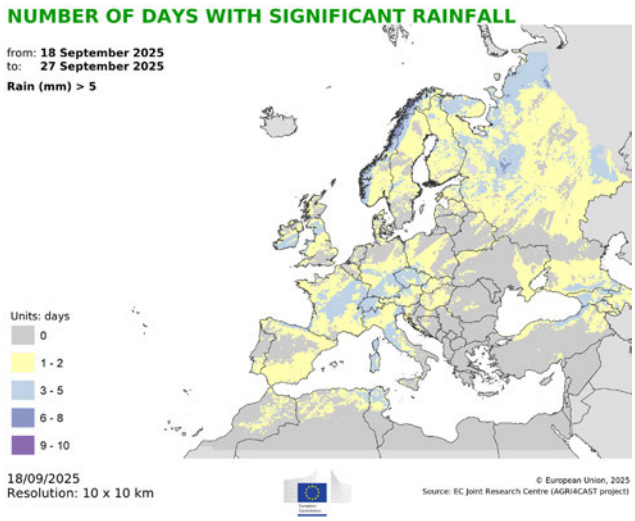
Wet conditions (precipitation of 30–90 mm) are forecast from central France across northern and central Italy to parts of central Europe and locally in southern Ireland, the Pyrenees, northern Tunisia and north-eastern Türkiye, with 3–5 days with precipitation above 5 mm. **Very wet conditions** (precipitation above 90 mm) are forecast in parts of central and southern France, the Alps and central Italy. **Dry conditions** (total precipitation below 3 mm) are forecast in parts of the central Iberian peninsula, southern Italy, the Balkan peninsula, most of Romania, Ukraine and Türkiye.

The **long-range weather forecast** (October to December) points to a moderate likelihood of warm conditions across most of Europe, exceeding the 24-year climatological median by up to 1 °C (2 °C in north/north-eastern Europe). Albeit with a high degree of uncertainty, below-average precipitation is forecast for south-western Europe and North Africa in October, persisting until December in the Iberian peninsula.





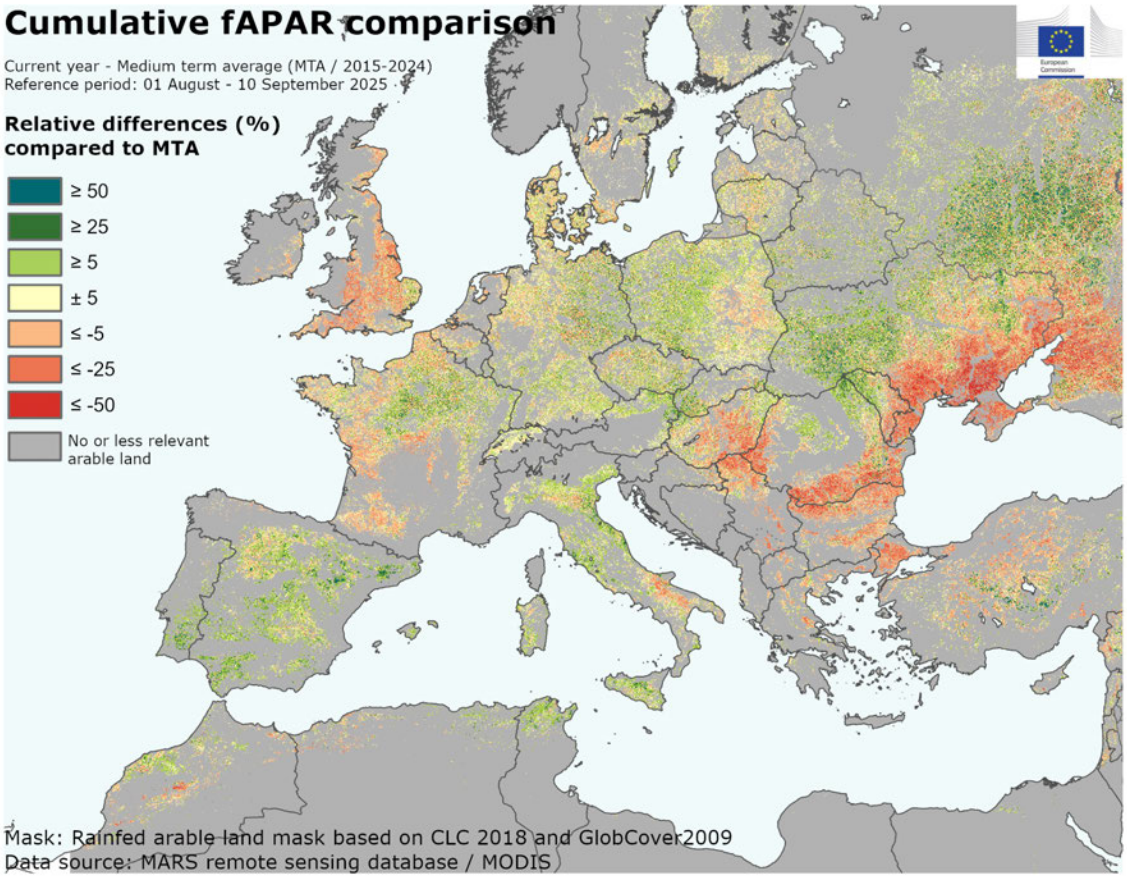




2. Remote sensing analysis

2.1 Arable land

Severe drought continues to affect the Black Sea region and central south-eastern Europe (Hungary, Romania), with negative impacts on summer crops. Western Europe from the United Kingdom to France also shows notable biomass deficits, while in other parts of western and central Europe crop conditions remain relatively favourable, with some regions showing above-average biomass.



The map displays the relative differences (in percentages) between the cumulative fraction of absorbed photosynthetically active radiation (fAPAR) from 1 August to 10 September 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.

In the **Iberian peninsula**, biomass accumulation remains above average in the north, confirming a near-average cropping season, while in the south the season has already finished. In **Italy**, summer crops in the north show delayed development but remain in good condition, as indicated by positive fAPAR anomalies, while in the south the cropping season has already come to an end.

In **France**, a strong north–south contrast is visible. In the south and west, summer crops were negatively affected by the July and early August rainfall deficit, resulting in below-average fAPAR values. In contrast, northern and eastern France show a close-to-average or even slightly above-average fAPAR.

In the **Benelux countries** and north-western **Germany**, recent rain deficits have led to low soil moisture levels, triggering premature senescence and advanced harvests, as shown by average to below-average fAPAR signals.

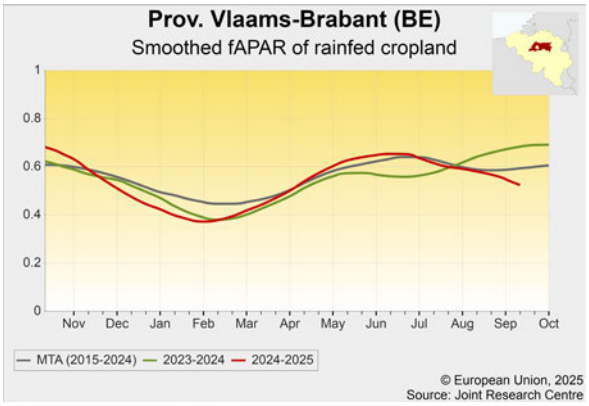
In the rest of **Germany**, in **Austria** and in western **Poland**, **Slovakia** and in **Czechia**, fAPAR anomalies are slightly positive, reflecting above-average biomass accumulation. Summer crops are progressing towards the end of their cycle under relatively favourable conditions.

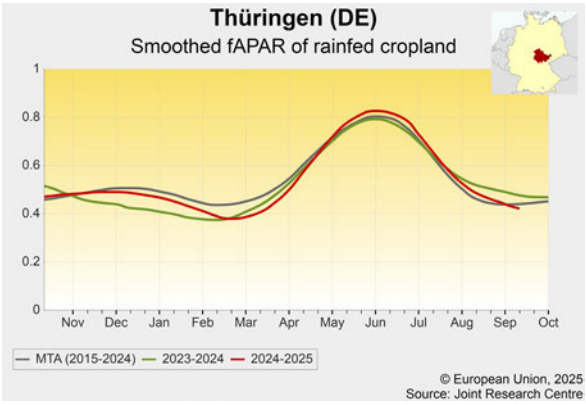
In **Denmark** and **Sweden**, the season for winter and spring crops is ending with biomass levels slightly above average, suggesting that growing conditions over the summer were generally supportive.

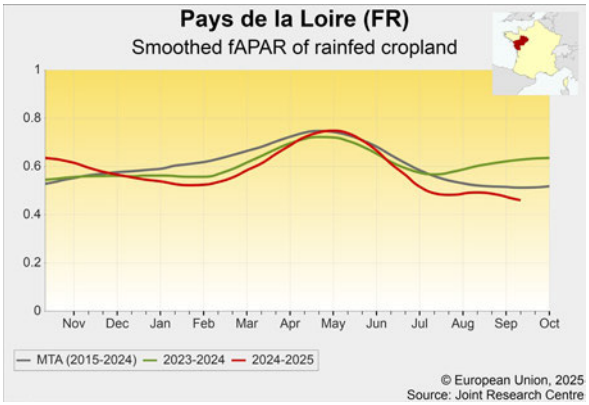
In eastern **Poland**, the August rainfall deficit negatively affected summer crops, while in **Latvia** and **Estonia** summer crops were negatively affected by the overly wet conditions that prevailed earlier in the season. This led to declining biomass levels late in the season, as reflected by widespread negative anomalies in these regions.

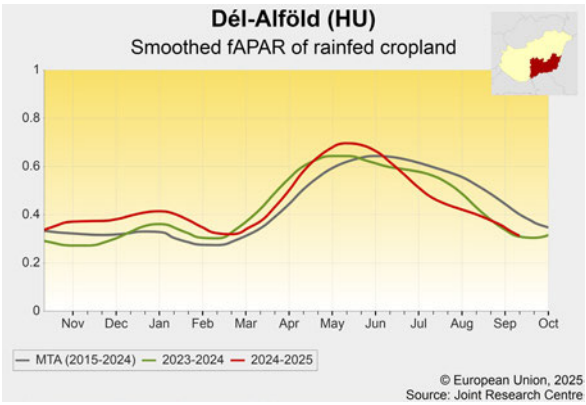
In western **Ukraine** and in central and northern **Romania**, summer crops show delayed development, but supportive summer rainfall has raised biomass accumulation to average or even above.

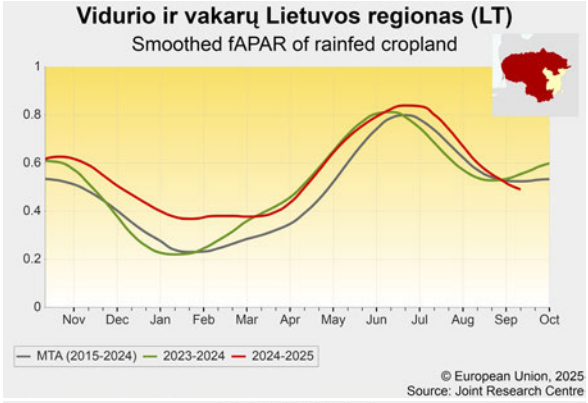
Around the **Black Sea region** and in large parts of **Hungary**, the situation remains critical. Persistent drought conditions since late spring through summer have severely constrained vegetation growth, causing strong negative anomalies in the fAPAR signal across these regions.

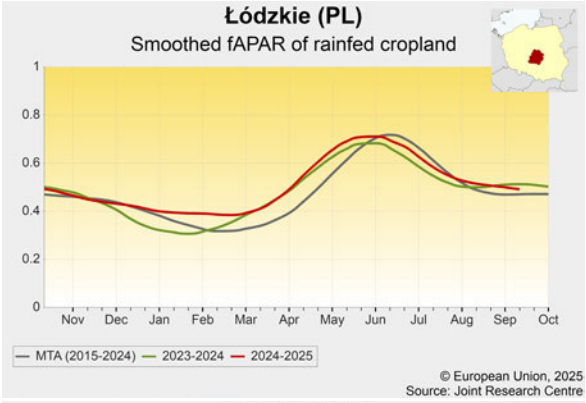


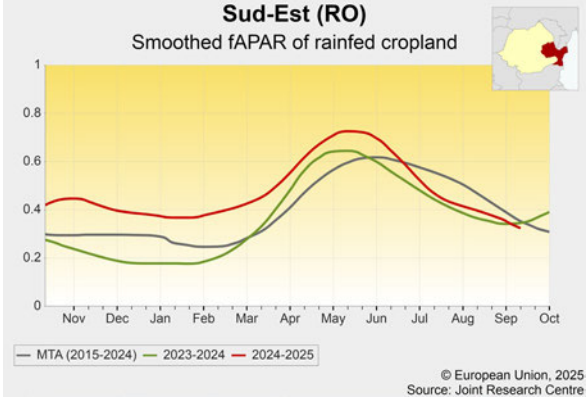


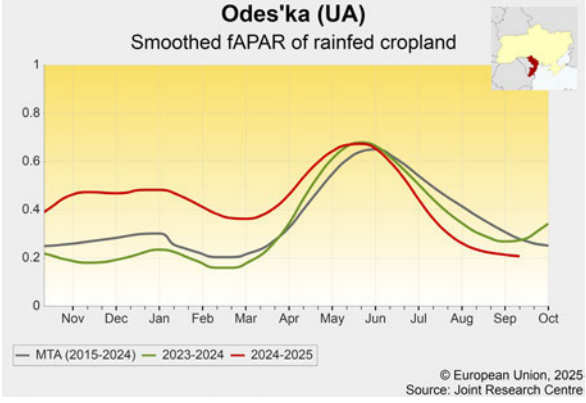






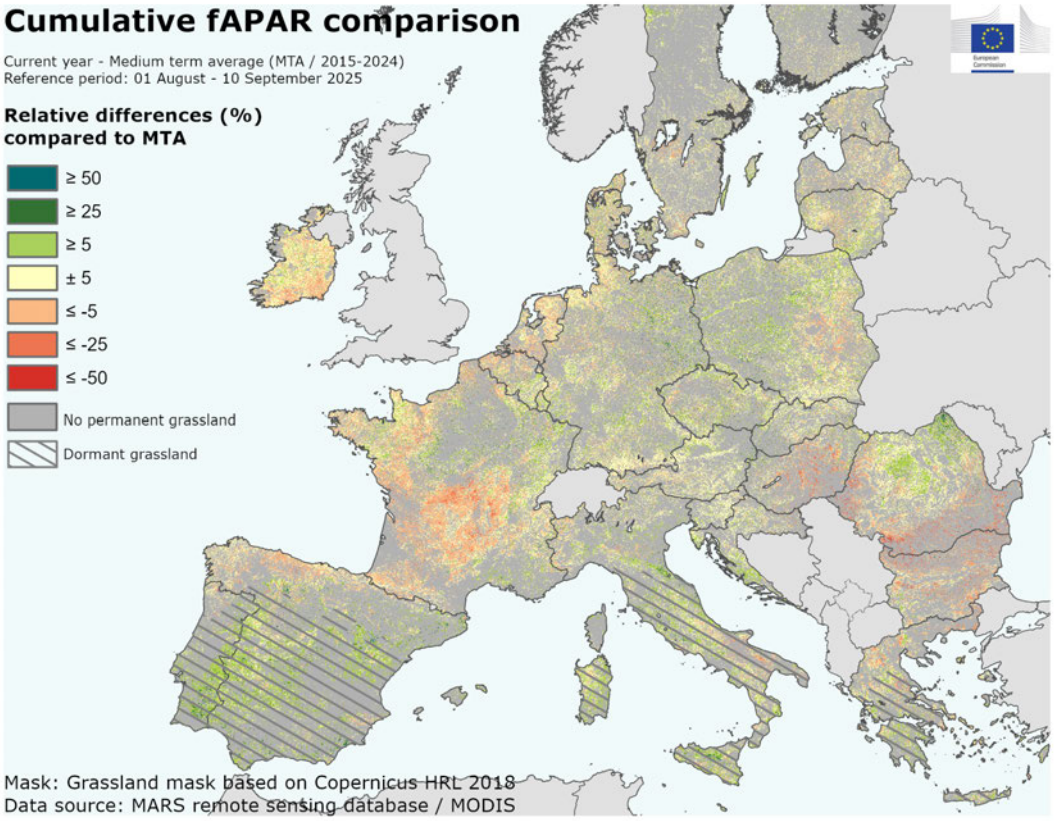






2.2 Grasslands and fodder

Grassland conditions have improved across Europe, but water stress persists in southern France, Hungary, southern Romania and Bulgaria. Grasslands remain dormant in the south of the Iberian peninsula, in Italy and in Greece.



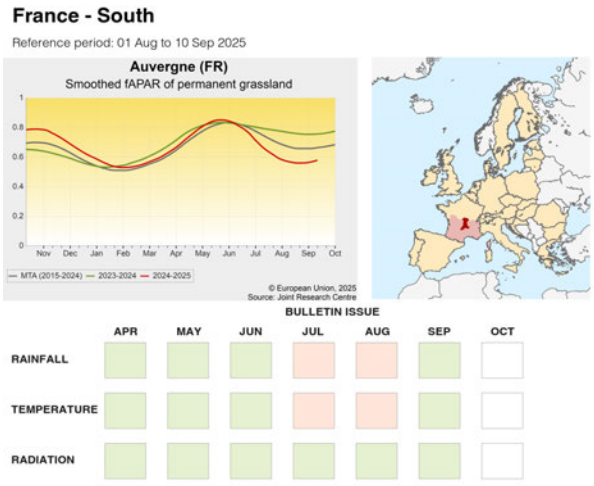
In southern **France**, despite abundant rainfall during the review period, grasslands did not recover from the severe early-season dryness. Most regions still show fAPAR signals well below the average, indicating a continuing biomass deficit. In northern France, conditions improved thanks to more regular rainfall, with the signal recovering to close to the MTA except in *Nord-Pas de Calais*, where water deficits persisted. **Ireland** experienced strong grassland growth overall, particularly in the north-west, while the east and south-east are still recovering from a dry spell in August. Fodder crops also performed well, with forage maize approaching harvest and showing good yield potential. In the **Benelux countries**, grasslands reflect the impact of a very dry August, with the satellite signal below the MTA in most areas, except in the south-east. In **Germany**, the south benefited from very good growing conditions and improved mowing opportunities, resulting in an above-average fAPAR signal. Northern Germany experienced abundant sunshine with favourable temperatures, but limited rainfall kept productivity close to average, especially in the north-west.

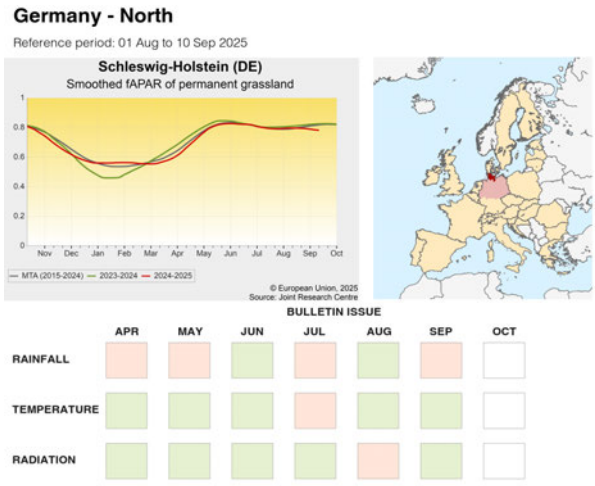
Grasslands performed well in **Denmark** and **Sweden**, staying close to the average despite relatively dry conditions, and prospects are positive for green maize. In **Finland**, growth was also sustained by near-seasonal conditions, with biomass levels close to the MTA. In the **Baltic countries**, the signal dropped below average in Estonia and Latvia, due to overly wet conditions earlier in the season, while in Lithuania it remained slightly above average. **Poland** benefited from adequate rainfall and temperature conditions, which supported biomass accumulation, with only minor localised water stress in the south-east. In **Czechia** and **Slovakia**, warm temperatures combined with above-average rainfall led to above-normal biomass accumulation, especially in western Slovakia. **Austria** maintained good growing conditions, with predominantly seasonal temperatures, despite slightly below-average rainfall in the east.

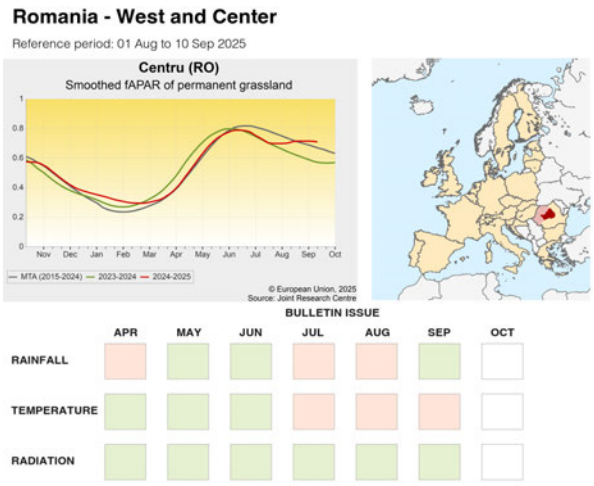
In **Croatia** and **Slovenia**, overall grassland growing conditions remained good despite uneven rainfall distribution, with wetter conditions in the west and much drier ones in the east. The fAPAR signal stayed close to or

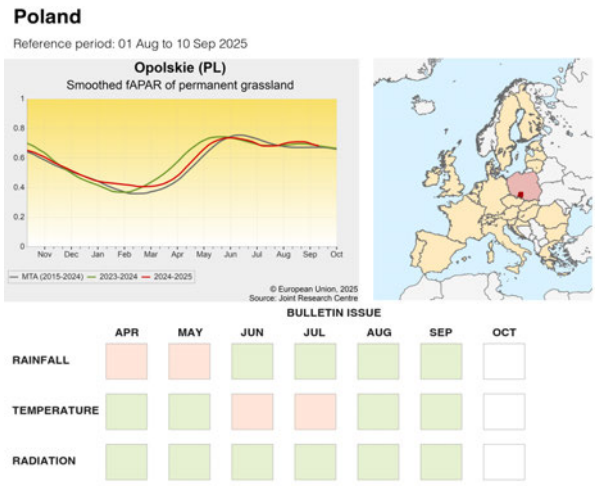
slightly above the MTA in both countries. In **Hungary**, biomass accumulation was generally very low, due to two heatwaves and scarce rainfall, with only western and south-western regions performing somewhat better. Fodder crops are in poor condition in central and eastern areas, and some grain maize has been converted to silage. In **Romania**, conditions are mixed: the north-east shows above-average production, while the south has suffered from drought, resulting in very poor productivity comparable to the disappointing figures in 2024. Green maize yields are expected to be very low, with more grain maize being converted to silage. In **Bulgaria**, persistent drought has left grasslands and fodder crops in very poor condition.

In northern **Italy**, the rain in the second half of August helped grassland and fodder crops to recover from the heat stress of the weeks before. In northern **Spain** and **Portugal**, grasslands are generally in good condition, although concerns remain in *Galicia*, *Principado de Asturias* and *Cantabria*, where rainfall deficits have led to below-average fAPAR signals. Nevertheless, the fodder sector in Spain anticipates a 7 % decline in production, due to reduced grassland area ([1]). In the south of the **Iberian peninsula**, central to southern **Italy** (including the islands) and most of **Greece**, grasslands remain dormant, and regrowth is expected in the coming weeks.









(1) https://www.alfalfaspain.es/se-preve-una-disminucion-del-7-en-la-produccion-nacional-de-forrajes-deshidratados-para-la-campana-2025-26/

3. Rice analysis

Positive overall outlook for rice in Europe

The growing season in Italy and Spain, Europe's largest rice-producing countries, has progressed well, supported by favourable rainfall in Italy and the availability of sufficient irrigation water in Spain. Conversely, rice fields in the Balkan peninsula have been affected by persistent hot and dry weather conditions during summer. At the EU level, the rice yield forecast is at 6.69 t/ha, which is 6 % above the five-year average.

In **Italy**, the rice season started under overly wet conditions, with weather improving rapidly during crop emergence. The most recent estimate of sown area indicates an increase of 4 % (around 9 300 ha) on 2024 [2]. Most of the vegetative phase took place in a moderately warm and wet July, while August was predominantly hot and dry. Notable precipitation has occurred again since late August, without causing concerns. The fAPAR signal remained close to average and has recently improved, while our rice model indicates above-average biomass accumulation in the storage organs. Pre-harvest operations are under way, and weather forecasts indicate that an upcoming dry period will support the harvest campaign. Our yield forecast has been revised upwards and is now 5 % above the five-year average.

In southern **Spain** (*Andalucía* and *Extremadura*), an adequate irrigation supply and the absence of biotic stress have supported good crop development, despite repeated heatwaves. Satellite data confirm above-average biomass accumulation, and harvesting is expected to start in October, with positive yield expectations. In *Cataluña*, rice crops are in line with the MTA in terms of biomass accumulation, although development is slightly advanced for the time of the season, and harvesting has already begun. In contrast, rice fields in *Comunitat Valenciana* have been severely affected by fungal disease (caused by *Pyricularia oryzae*) as a result of the wet and warm conditions in August, leading to clearly below-average biomass signals and substantial production losses. Despite these regional issues, our overall yield forecast for Spain remains well above the five-year average.

In **Portugal**, despite a delayed start to the season due to late sowing, above-average summer temperatures and the availability of sufficient irrigation water have enabled rice fields to withstand heatwaves and develop well. Crop model simulations and remote sensing analyses both confirm above-average biomass accumulation, with no evidence of significant biotic stress. Consequently, our yield forecast has been revised upwards, placing it above the five-year average.

In southern **France**, rice crops are advanced in their development by about 10 days compared with last year, due to high summer temperatures. Although midsummer storms did not cause damage and biomass accumulation has been good, a reduced supply of fresh water in the southern Camargue, caused by the low flow of the Rhône river, has increased salinity levels, potentially constraining reproductive stages. With the harvest about to start, our yield forecast remains slightly above the five-year average.

In **Greece**, persistently high summer temperatures mitigated the initial delays in sowing and early growth, but crop development still remains about 10 days later than usual, and crops are now in the ripening stage. Summer rainfall was well below average, and this, combined with irrigation issues and weed infestations (*Echinochloa*), means that yield expectations have been lowered. We have revised our yield forecast downwards, but it remains slightly above the five-year average, due to last year's very poor outcome.

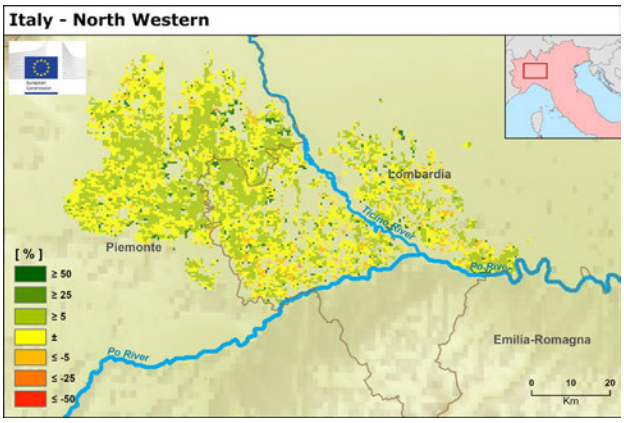
In **Bulgaria** (*Plovdiv* and *Stara Zagora*), dry and warm conditions have persisted since June, with most fields receiving only about 50 mm of rainfall during the entire summer. July was particularly hot and dry, hampering the reproductive phase. A reduction in the cultivated area is expected. Our yield forecast has been revised downwards, to around 5 % below the five-year average.

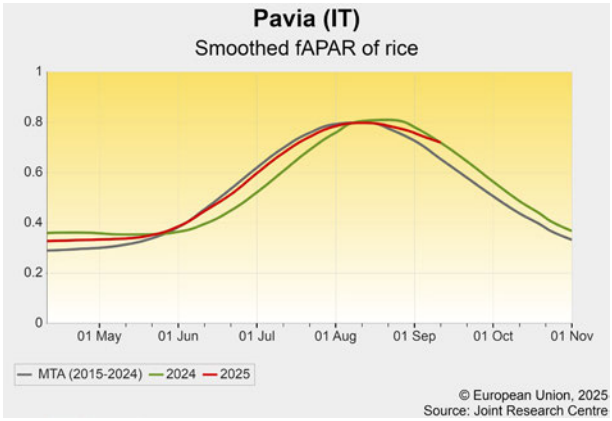
The rice season in **Romania** was marked by high temperatures and below-average rainfall, with rice fields receiving only 30–40 % of the expected precipitation. Moreover, the drought throughout the country limited access to irrigation water. Satellite and modelled biomass indicators suggest that rice plants remain in poor condition. Our yield forecast has been revised significantly downwards, while still remaining above the five-year average.

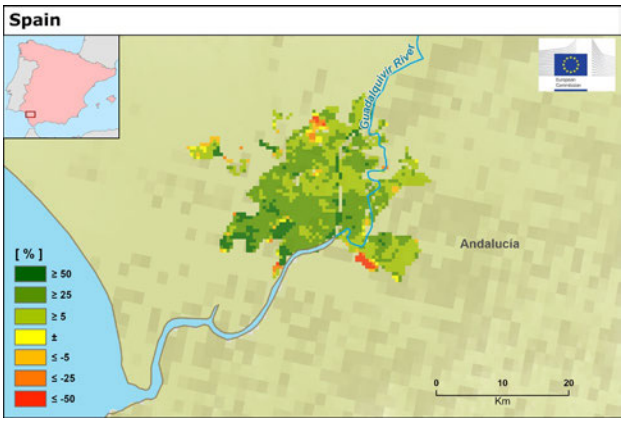
In **Hungary** also, the rice-producing regions to the south-

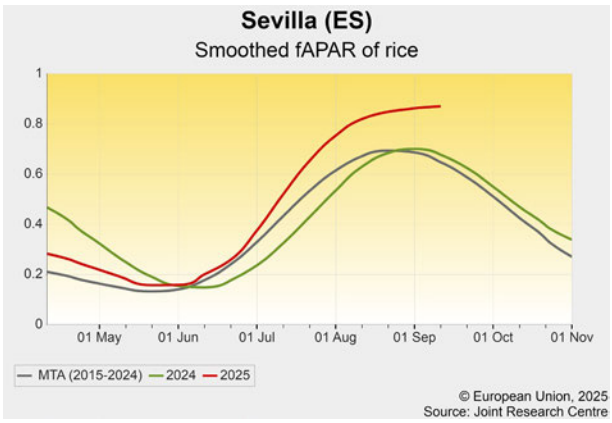
[2] https://www.enterisi.it/upload/enterisi/gestionedocumentale/RISIsettembre2025_784_114867.pdf.

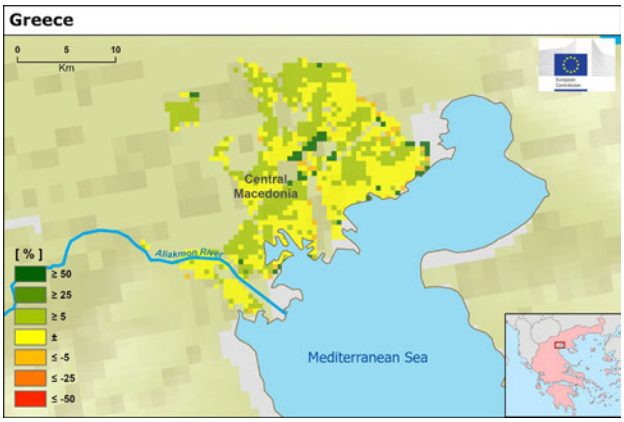
east (*Jász-Nagykun-Szolnok* and *Békés*) experienced a hot and dry summer, with maximum temperatures exceeding 35 °C on several days and precipitation about 50 % below the LTA. The fAPAR signal shows a mixed pattern, while our model simulations suggest near-average crop development and satisfactory biomass accumulation. Overall, our yield forecast has been revised slightly downwards, while remaining just above the average for the past five years.

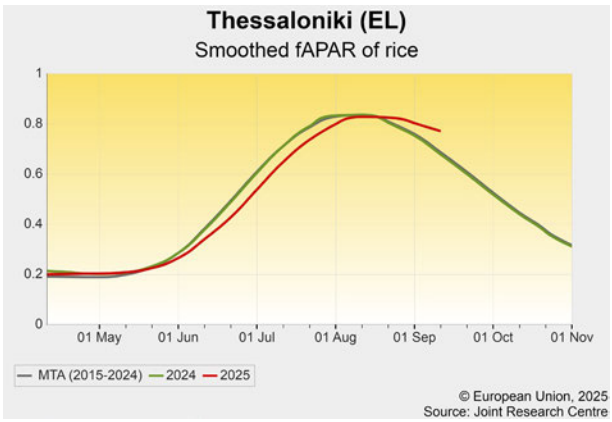


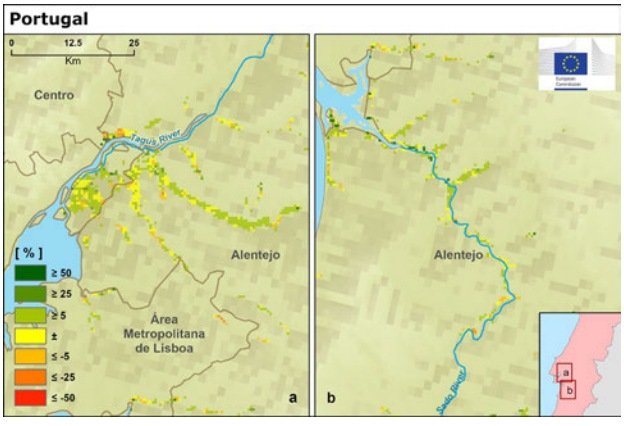


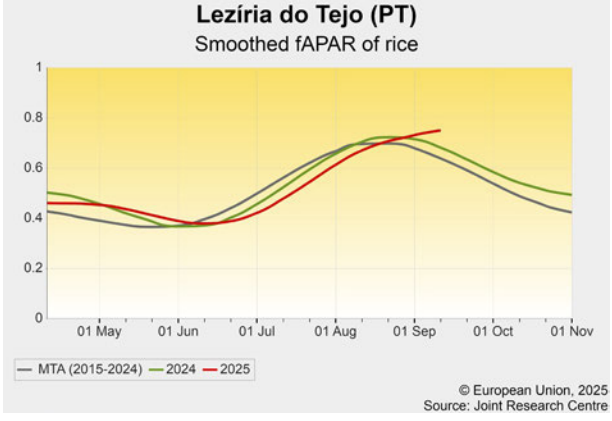


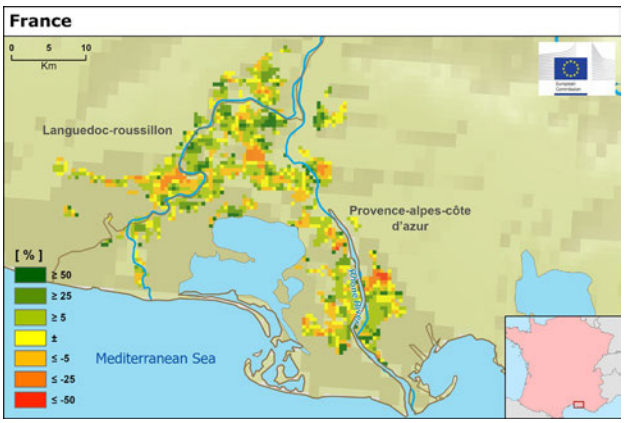


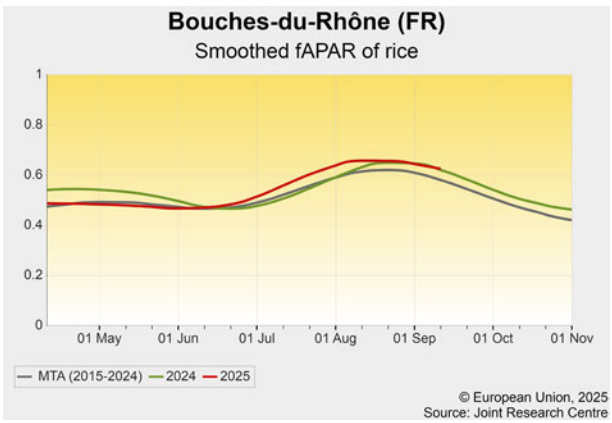


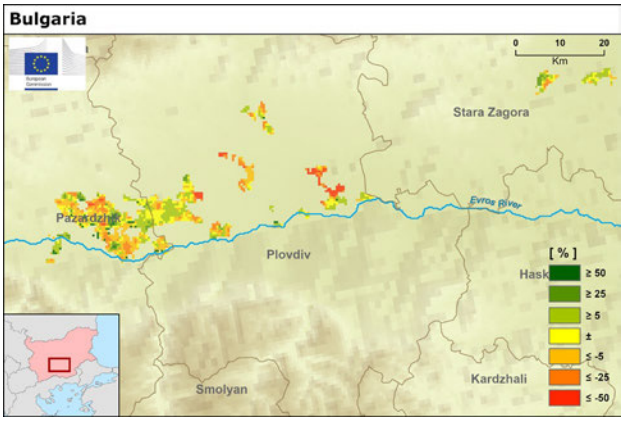


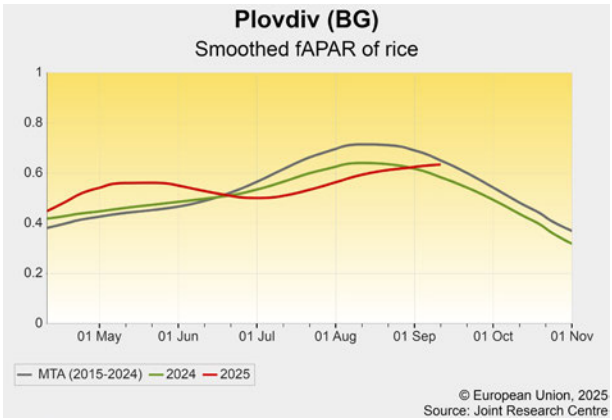


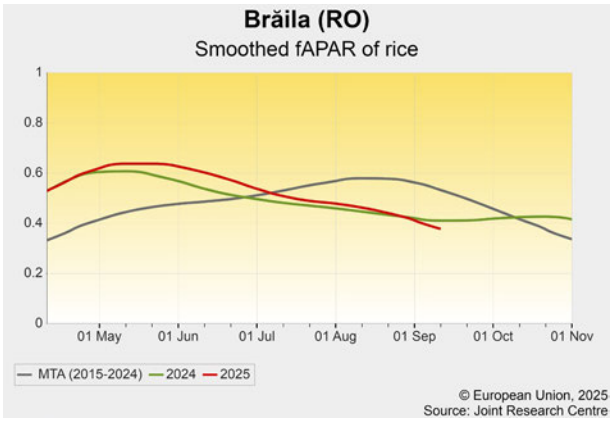


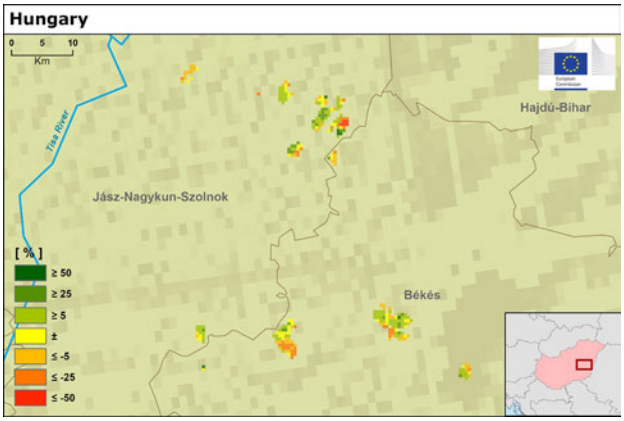


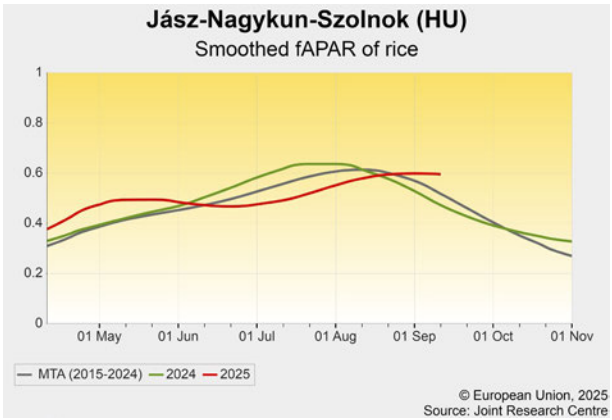












The maps display the difference between the fAPAR from 1 June to 10 September 2025 and the 2015–2024 MTA for the same period. Mask: Rice areas based on CLC 2018. Data source: JRC MARSOP6 remote sensing database / MODIS

4. Country analysis

4.1 European Union

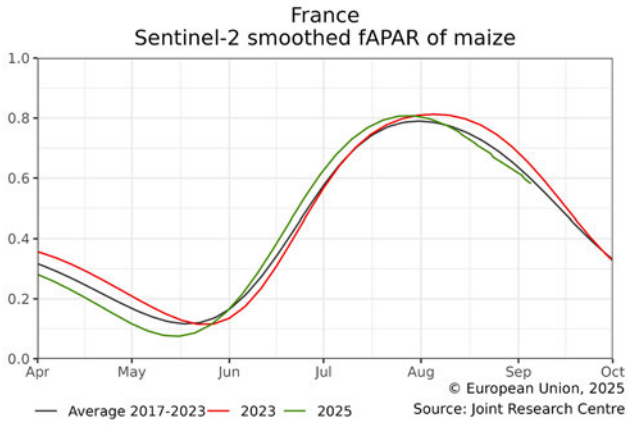
France - maize outlook improved

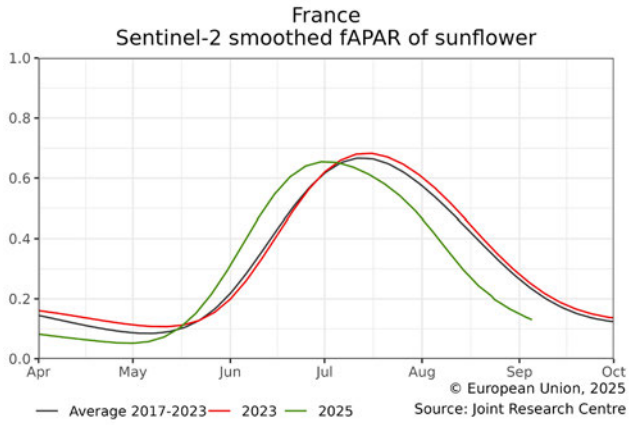
Hot and dry conditions prevailed during the first two dekads of August in western France (*Pays de la Loire*, *Poitou-Charentes*), negatively affecting summer crops. The grain-filling phase of maize and sunflower was shortened, resulting in early ripening and allowing the harvest campaign to start in most affected parcels.

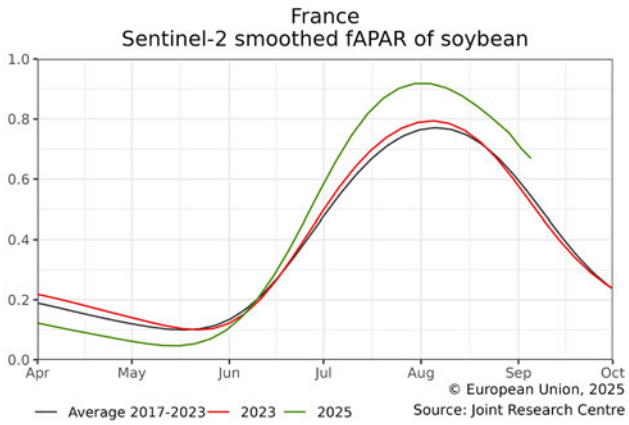
In contrast, above-average rainfall was favourable in the north-east, supporting above-average biomass accumulation (e.g. in *Alsace*) and maintaining a well above-average yield outlook. In the north, summer weather was generally favourable, despite a rainfall deficit in August, keeping yield expectations close to average. In the south-west, significant mid-August rainfall preserved a near-average outlook.

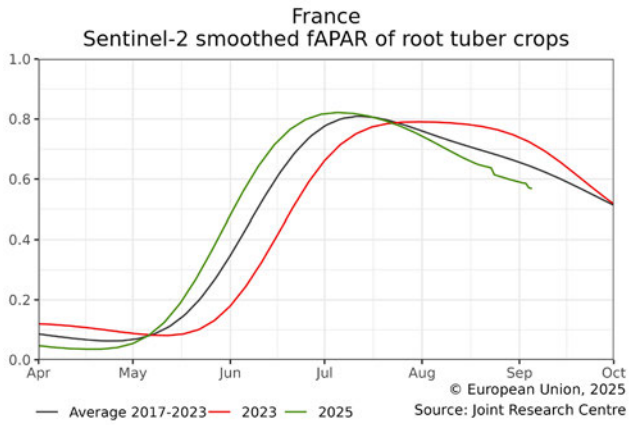
Overall, the fair-to-positive outlook in the south-west, east and north offset the negative yield expectations in the west for maize, and our yield forecast remains in line with the five-year average at the national level. The sunflower yield forecast has been revised downwards, as this crop is mostly cultivated in the west.

After a good start, sugar beet and potatoes in the north have suffered from the limited rainfall in August, leading us to revise the outlook for them downwards to slightly below the five-year average.







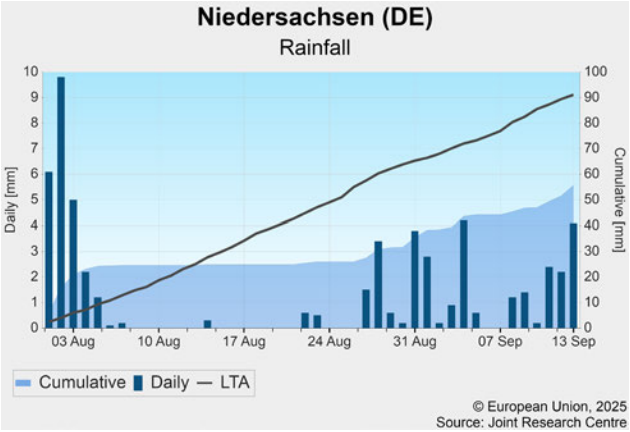


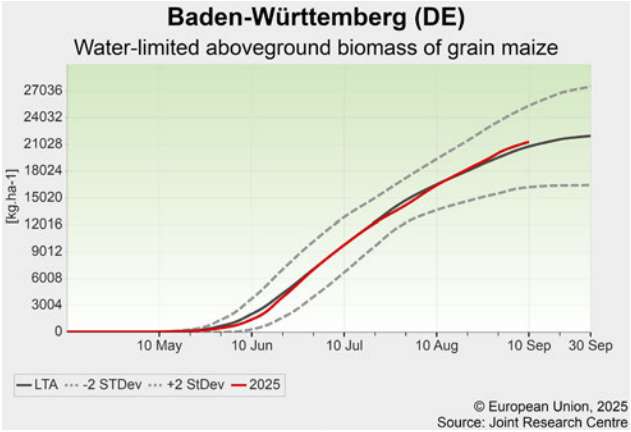
Germany – mixed expectations for summer crops, winter crop sowing under way

During the reporting period, summer crops in Germany were largely in the reproductive and bulking stages. In the south, timely August rainfall supported kernel filling and root enlargement. The north and east remained dry, limiting growth and accelerating senescence, which triggered a timely maize harvest at the beginning of September.

Rapeseed sowing progressed well and is now in its final stages, while the barley and wheat sowing campaigns have just started. Delays were registered in the west and south-west due to repeated rainfall, while poor seedbed moisture is hindering the uniform emergence of these crops in the north. Current weather forecast indicates rainfall followed by a cloud-free period, which should improve access to fields and support the emergence of crops.

Our yield forecasts for sugar beet and potatoes remain unchanged below the five-year average, while maize stays close to it. Spring crop forecasts were increased to above the five-year average, thanks to very favourable conditions during harvest.

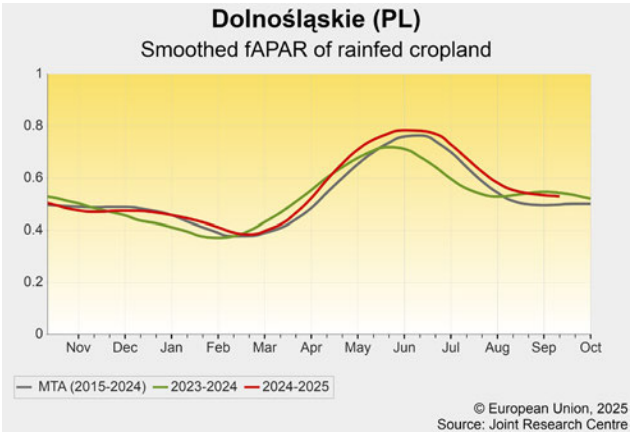




Poland - fair yield outlook for summer crops

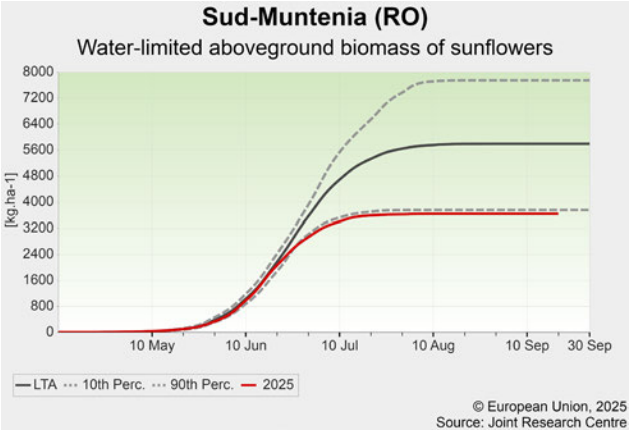
Near-seasonal to above-average rainfall prevailed during the reporting period in western Poland (*Dolnośląskie*, *Wielkopolskie*), in the country's major grain maize and sugar beet production regions. Near-seasonal temperatures supported an adequate soil moisture supply and created favourable conditions for summer crops during the grain-filling stage. In contrast, eastern Poland (*Podlaskie*, *Lubelskie*) experienced a significant rainfall deficit coupled with above-average temperatures. Although no severe thermal stress occurred, the resulting limited water supply affected green maize and sunflower growth in the east.

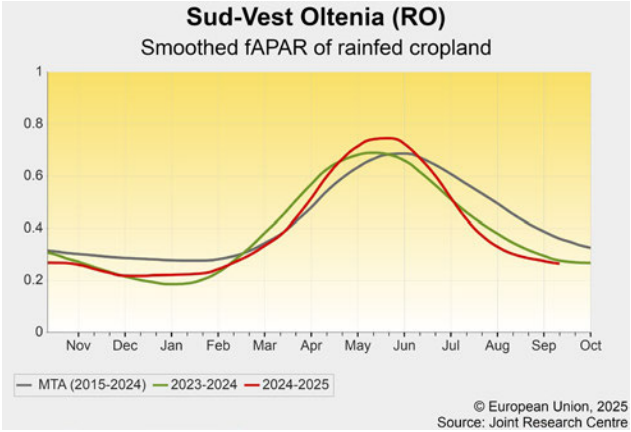
Our crop model simulations indicate that phenological development has been pushed back to the expected seasonal timing, and satellite imagery shows sustained above-average biomass accumulation in the west but a deteriorating signal in the east. Consequently, yield forecasts for grain maize and sugar beet have been revised upwards, whereas yield expectations for green maize and sunflower have been lowered. Overall, our yield outlook for summer crops remains in line with the five-year average.



Romania – low grain maize and sunflower yield expectations confirmed

A severe rainfall deficit and high temperatures persisted in southern Romania during the reporting period. The soil moisture content fell short, resulting in early senescence of crops, reduced biomass accumulation and accelerated ripening, all compromising the yield formation. In the west, rainfall was more frequent after mid August, but too late to improve the situation along the Hungarian border. In the centre and north-east, however, summer crops received beneficial rainfall during the reporting period and before. Biomass accumulation and yield outlook are better here, compensating at the national level to some extent for the very low yield expectations for grain maize and sunflower in the drought-affected areas. The yield forecasts for potatoes and sugar beet, cultivated mainly in regions with sufficient rainfall, have been increased. The rapeseed sowing campaign started in the last dekad of August but was hampered by dry topsoils in the south and by recent rain elsewhere.

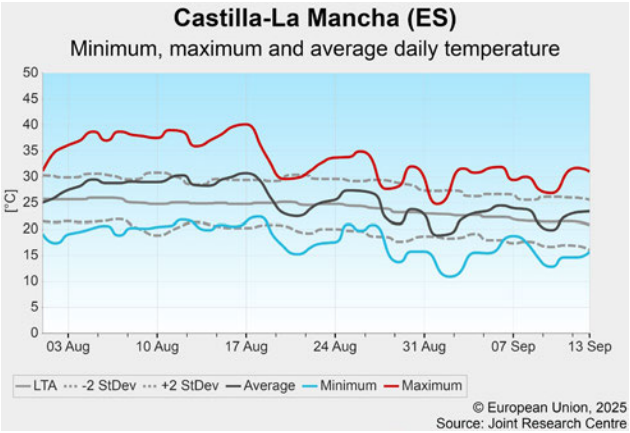


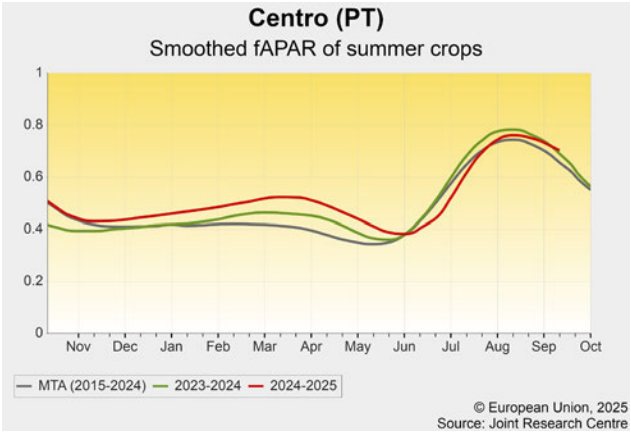


Spain and Portugal - irrigation sustains near-average summer crop outlook

An intense heatwave affected the Iberian peninsula during the first half of August, after which temperatures returned to close to the seasonal average for the remainder of the reporting period, helping irrigated summer crops to withstand abiotic stress and continue their development. However, in the north-west, a significant rainfall deficit affected grasslands and rainfed fodder crops. fAPAR signals from remote sensing indicate that biomass accumulation is around the MTA across most of the peninsula, although our crop model simulations suggest below-average results in rainfed areas.

The sunflower harvest has been completed in the south and is starting in the north. Maize harvesting has begun in southern regions, while crops in the north are still maturing. The potato harvest is ongoing in *Castilla y León*, and earlier varieties are being collected in north-western regions. Our yield forecasts for summer crops are confirmed at around or slightly below the five-year average, but expectations for green maize, produced mostly in *Galicia*, have been lowered.



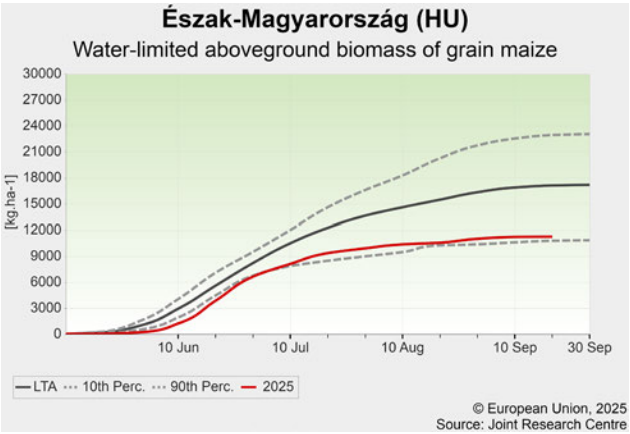


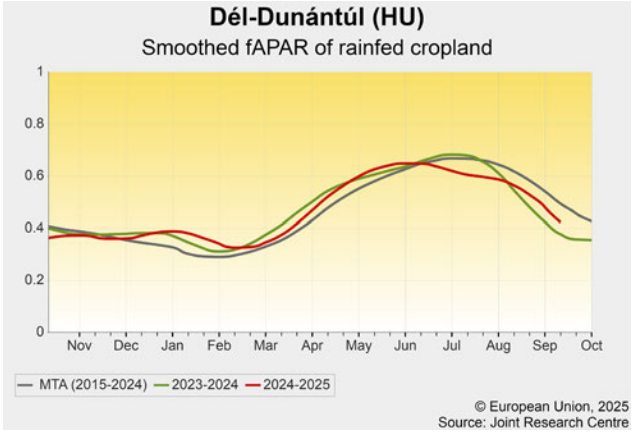
Hungary – below-average yield expectations further reduced

Heat stress and a considerable soil moisture deficit intensified in central and eastern Hungary in August, seriously impacting the yield formation of grain maize, but also of sunflower and other summer crops. The high temperatures accelerated the crop cycle, reducing the time for grain filling and thus our yield expectations. Some sown grain maize may be harvested as green maize. The rain since September has hardly improved the condition of summer crops in the centre and east, but crops are in better shape in western Hungary, thanks to more rain and milder temperatures.

The hot weather provided favourable conditions for aflatoxin contamination, reducing grain quality and limiting usability for food or feed. Our yield forecast for summer crops was revised further downwards, to well below the five-year average.

The rapeseed sowing campaign is progressing well despite abundant rainfall in the first half of September, which caused delays only locally.

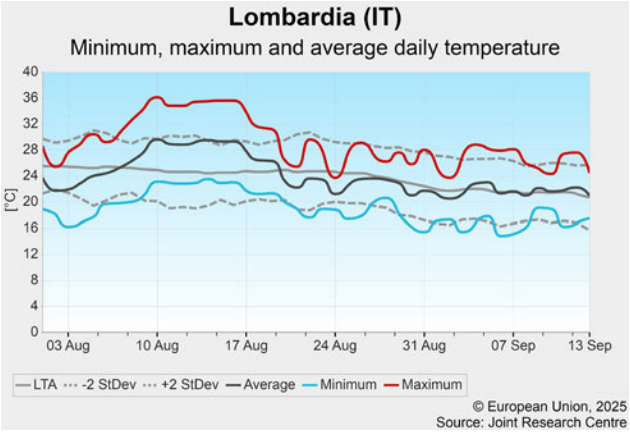


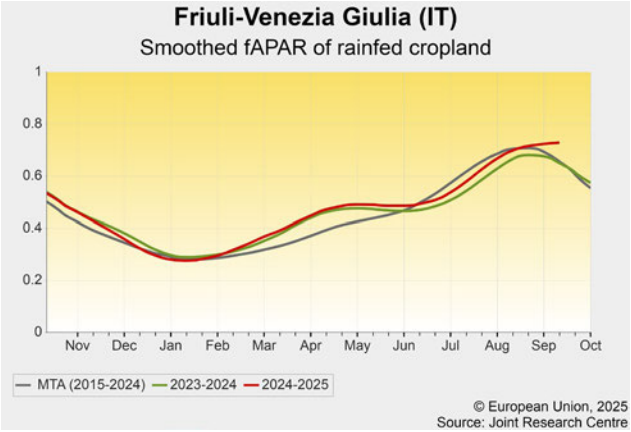


Italy - good expectations for summer crops

In northern Italy, the heatwave of 10–17 August (e.g. in *Lombardia*) was the main threat to summer crops. The high daytime temperatures threatened flowering in late-planted maize, while the high night-time temperatures affected all crops by increasing respiration and thus reducing yield potential. After 17 August, temperatures decreased and abundant rainfall occurred, notably in north-eastern regions (e.g. *Friuli-Venezia Giulia*). Maize and soybean benefited from the wetter conditions, with average temperatures, and grain formation and filling progressed under very favourable conditions. Locally, heavy rain caused crop lodging and favoured pest spread. Since September, weather has turned drier, favouring the harvest of grain and green maize.

In central Italy, the summer crop season ended in August with average to below-average sunflower yield expectations. Overall, September yield forecasts for summer crops increased compared with August, reaching around or above the five-year average, thanks to the favourable development of crops in the north.

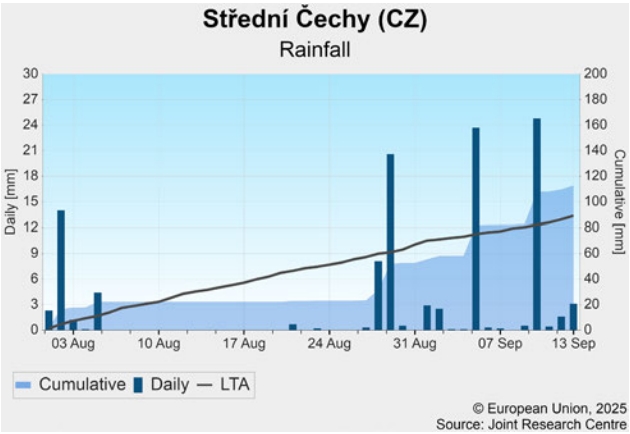


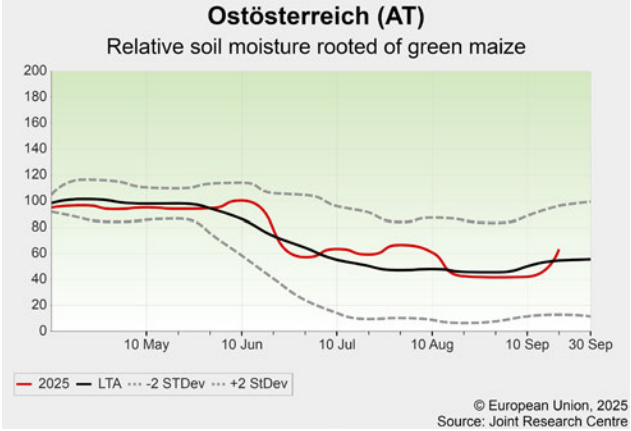


Czechia, Austria and Slovakia- good prospects for spring and summer crops under favourable weather

Summer crops across Austria, Czechia and Slovakia have continued to benefit from favourable weather and a sufficient supply of soil moisture, supporting grain filling in maize and the growth of potatoes and sugar beet. In Czechia and most of Slovakia, current soil conditions are ideal for sowing winter crops, with rapeseed sowing already complete in Czechia. Barley and wheat sowings are about to start. Only in western Slovakia and southern Austria, which have experienced plenty of rainfall, are farmers closely monitoring field accessibility and waiting for a dry window to begin winter cereal sowing.

Due to the very favourable weather, we have revised our forecasts upwards, to considerably above the five-year average for spring barley and slightly above average for summer crops, except for Czechia, where grain maize has not fully recovered from the very dry spring.

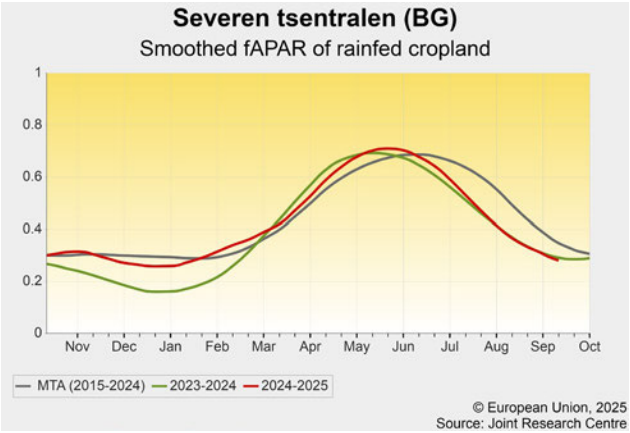


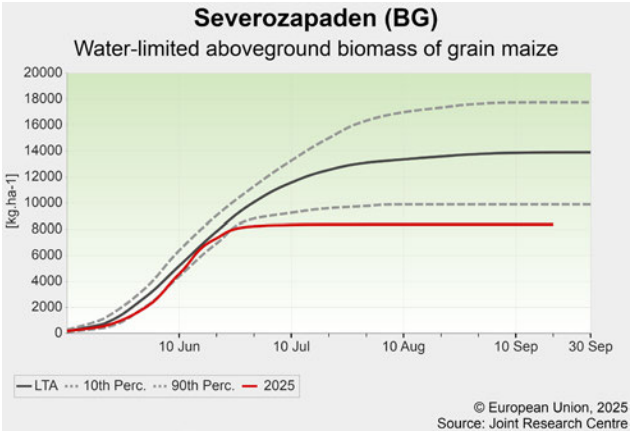


Bulgaria - disappointing summer crop yield outlook

The severe summer drought continued during the reporting period. Some precipitation arrived after mid August, but too late to support the yield formation of summer crops. Our crop model simulations show accelerated crop development and early senescence due to persistent hot conditions and an inadequate supply of water to crops since June. Sunflower has already reached maturity; its harvest is progressing well thanks to the dry weather. Grain maize is in the late ripening stage. Biomass accumulation and yield formation are poor for all summer crops, as confirmed by remote sensing imagery; the situation seems similarly difficult to last year. Our yield forecasts for summer crops have been revised further downwards, to well below the five-year average.

Recent rainfall has increased the moisture content of the topsoil, but seedbed preparation, sowing and emergence of winter rapeseed will require more precipitation, which is not currently in sight.

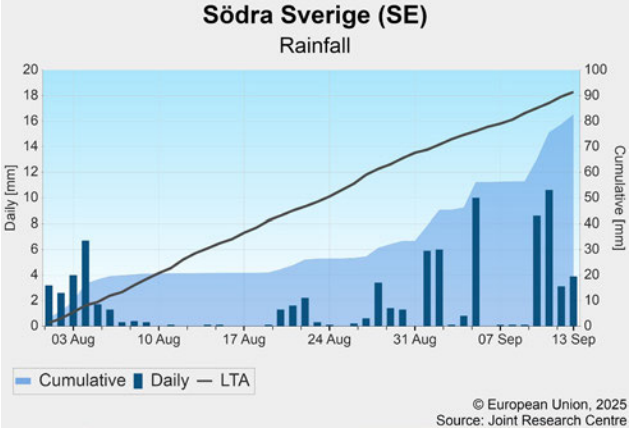


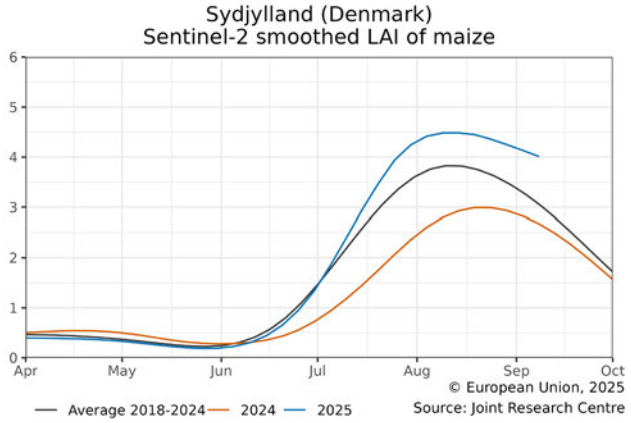


Denmark and Sweden - very positive outlook for cereals

Crops are in good condition in these Nordic countries; harvesting of cereals was concluded rapidly thanks to favourable weather. The MODIS satellite signal is slightly below the MTA in both Denmark and Sweden, due to the early and swift harvest. Our analysis suggests very good yield expectations for cereals, especially for spring barley; the forecasts are close to the record yields of 2022. The yield outlook is equally promising for summer crops, as revealed for maize by our crop-specific Sentinel-2 analysis, while tuber crops are also expected to be in good condition, despite the rainy conditions reported in the previous edition of the *JRC MARS Bulletin*.

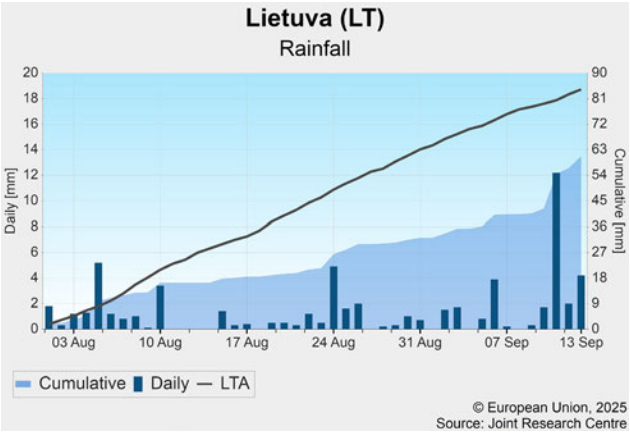
Our yield forecasts, already above the five-year average, are further revised upwards for soft wheat, spring barley and green maize.

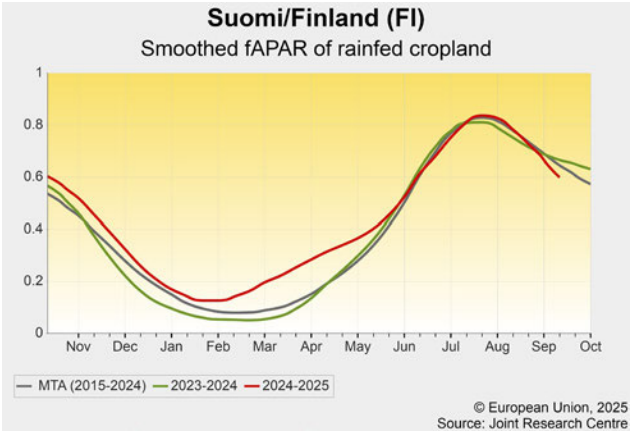




Estonia, Latvia, Lithuania, Finland - dry weather alleviates excessive soil wetness in the Baltic countries

Dry conditions prevailed in Lithuania and Latvia, alleviating the excessive soil moisture reported in the previous editions of the *JRC MARS Bulletin* and allowing farmers to rapidly conclude the cereal harvest. The MODIS([3]) satellite signal shows a negative anomaly across the region, due to the early conclusion of the harvest in August. Maize and tuber crops are reaching maturity and should benefit from near-seasonal conditions. In Latvia, yield expectations are slightly reduced for winter and summer crops but remain cautiously positive despite the prolonged wet conditions of the summer; grain quality, however, is expected to be strongly affected. In Lithuania, Estonia and Finland, the outlook remains positive. Our yield forecasts remain above the five-year average for both winter and summer crops in Lithuania, Estonia and Finland, but they have been reduced to close to the five-year average for Latvia.

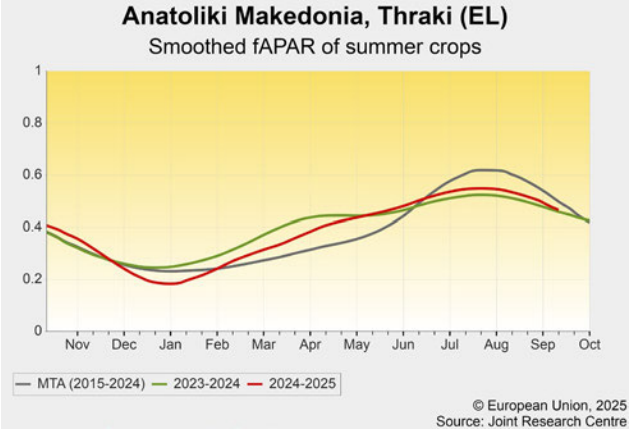


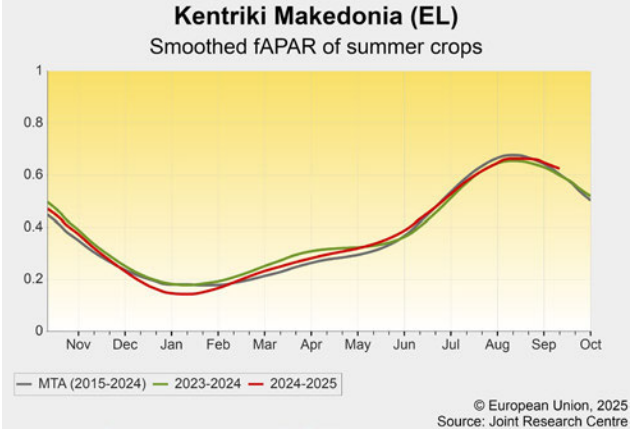


([3]) Moderate Resolution Imaging Spectroradiometer

Greece - lack of irrigation water remains an issue

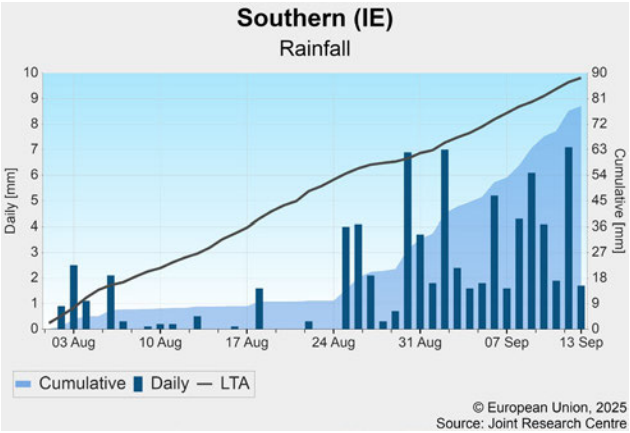
The review period was characterised by largely seasonal temperatures in August and slightly above-average temperatures in September. The lack of rainfall and poor replenishment of reservoirs continued to limit crop growth. In areas where sufficient irrigation was feasible, crops seem to have withstood the heatwaves and are in fair condition. However, in rainfed fields and in areas where irrigation problems have persisted, yields are expected to be very low. Satellite-derived fAPAR signals for summer crops – sunflower, maize, potatoes – are around average in *Dytiki Makedonia*, *Kentriki Makedonia* and *Dytiki Ellada*. In contrast, fAPAR values indicate below-average biomass levels in *Thessalia*; *Anatoliki Makedonia, Thraki*; and *Sterea Ellada*. This probably reflects poor rainfed conditions or limited irrigation. Potato harvesting has started, with yields expected to exceed last year's levels, albeit still falling below the five-year average. We confirm our August forecast for summer crops, with yields remaining below the five-year average.

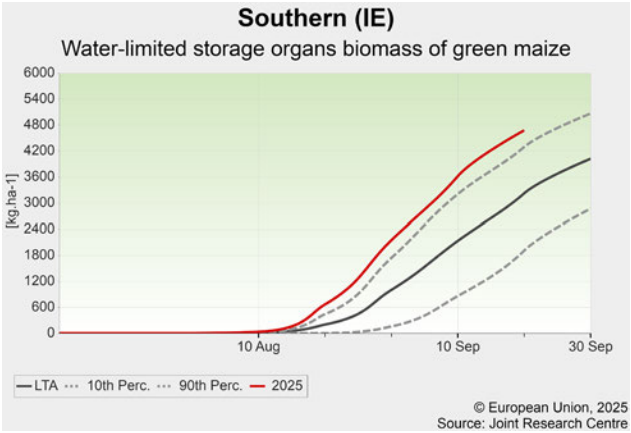




Ireland - favourable weather supports spring and summer crops

The winter crop season ended with an early harvest and significantly above-average yields. Spring barley was also harvested earlier than usual, under favourable weather conditions. Warm and dry weather persisted until the third week of August. It turned wetter at the end of the month and the beginning of September, when most field operations had already been completed. These included the harvest of spring barley, which matured well and produced good final yields overall, and the sowing of winter rapeseed, which probably resulted in a larger sown area than in the previous year [4]. For green maize, our crop model simulations suggest above-average biomass accumulation. Our yield forecasts for spring barley and green maize remain positive, at around 5 % above the five-year average and unchanged from last month.



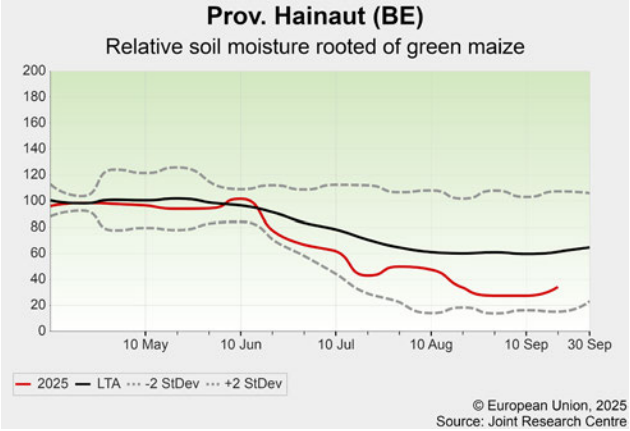


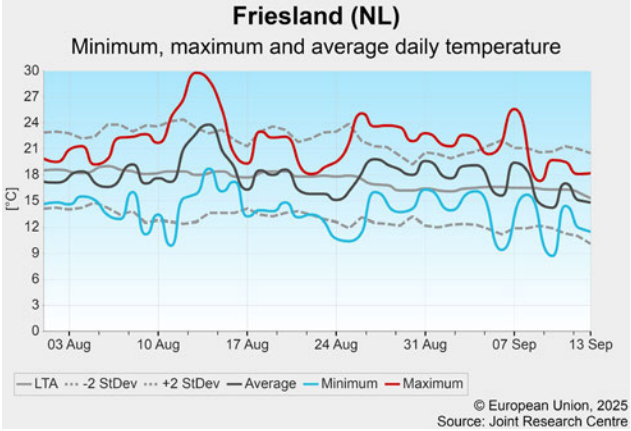
[4] https://www.agriland.ie/farming-news/winter-oilseed-rape-planting-season-about-to-get-underway/.

Benelux countries - crop development accelerated by dryness

Exceptionally dry and sunny weather in August, combined with a short but intense heatwave, accelerated crop development across the Benelux countries. Dry soils temporarily halted potato tuber bulking. Sugar beet performed better thanks to deeper roots; their harvest campaign has started, with high beet and sugar yields expected, despite the presence of *Cercospora* and rust pressure; wilting of sugar beet grown on light soils may reduce yields locally. Green and grain maize on sandy soils ripened prematurely during the dry period, with many fields reaching maturity up to four weeks earlier than average and the harvest on its way. Rapeseed sowing has started, and recent rainfall, since the end of August, has improved crop establishment.

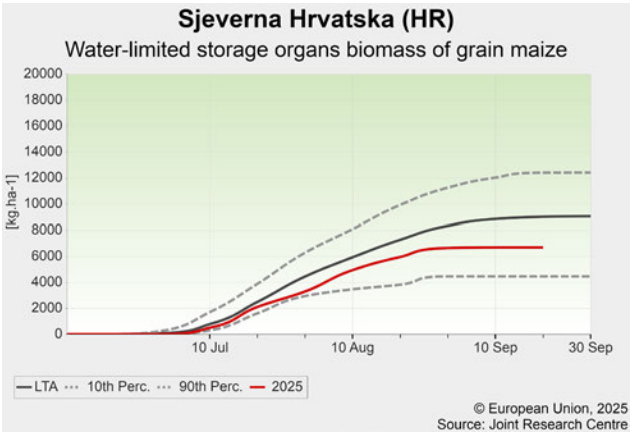
Our yield forecasts for potato and sugar beet remain above the five-year average, despite strong regional variability; the yield forecasts for green and grain maize have been slightly lowered to around or slightly below the five-year average.





Slovenia and Croatia – mixed outlook for summer crops

Slovenia received abundant rainfall during late August and early September, particularly in the west, and satellite observations and crop model simulations for grain and green maize show an improvement on crop conditions in previous months. In contrast, the east of the *Panonska Hrvatska* region in Croatia remained rather dry until the end of August, while northern Croatia (the *Sjeverna Hrvatska* region*)* experienced some precipitation, albeit less than average. The persistent rainfall deficit during both the vegetative and reproductive phases of summer crops had already negatively affected crop growth in Croatia, and the limited rainfall during this reporting period was insufficient to improve the overall outlook, which remains negative. Our yield forecasts for grain and green maize in Slovenia have been revised slightly upwards and are now approaching the five-year average. For Croatia, our yield forecasts for sunflower, soybean, grain and green maize remain unchanged, at about 5 % below the five-year average.

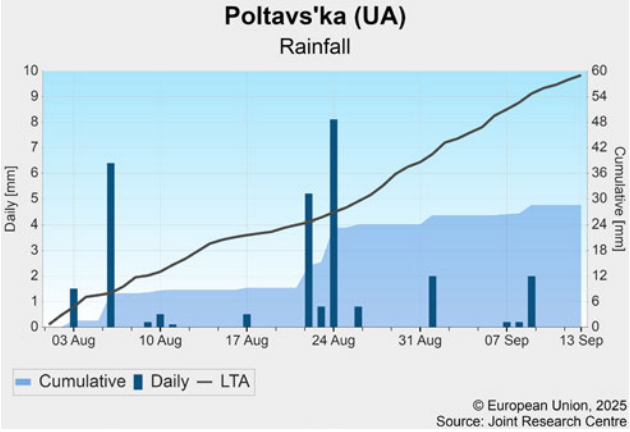


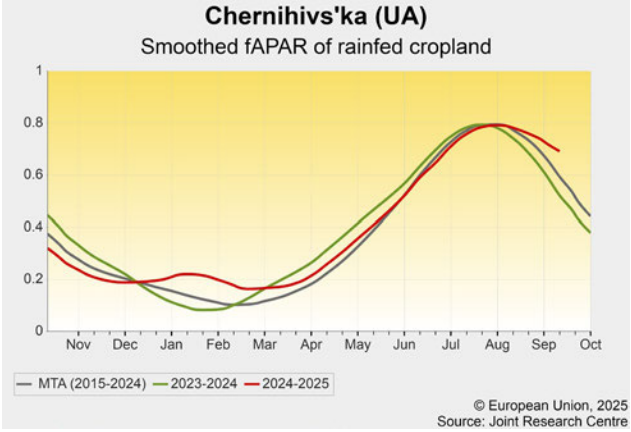
4.2 Ukraine

Ukraine - contrasting yield outlooks for summer crops

Drier-than-usual conditions prevailed across most regions during the reporting period. Temperatures remained slightly below average until late August, before rising above average thereafter. While soil moisture levels stayed adequate in the western and northern oblasts, thanks to sufficient rainfall in July, drought intensified in the southern and eastern oblasts, negatively affecting summer crops.

The absence of severe heat stress generally supported the final reproductive stages of summer crops, maintaining yield potential, particularly in the western and northern oblasts. Soybean harvesting began slowly at the end of August, and the grain maize harvest started in early September. At the national level, above-average yields are expected for both grain maize and soybean. A more detailed analysis at the oblast level is provided in the latest edition of the bulletin on Ukraine ([5]) in the *Global Outlook* series.



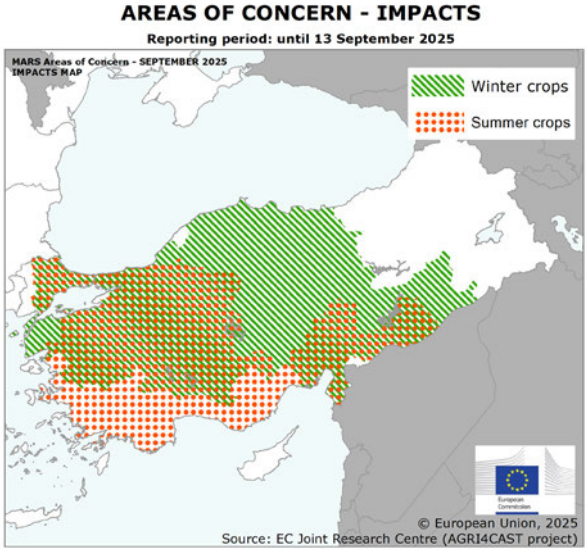


(5) https://publications.jrc.ec.europa.eu/repository/handle/JRC141671

5. Extended analysis of Türkiye

Türkiye - low yield expectations due to lasting drought

Overview and forecasts



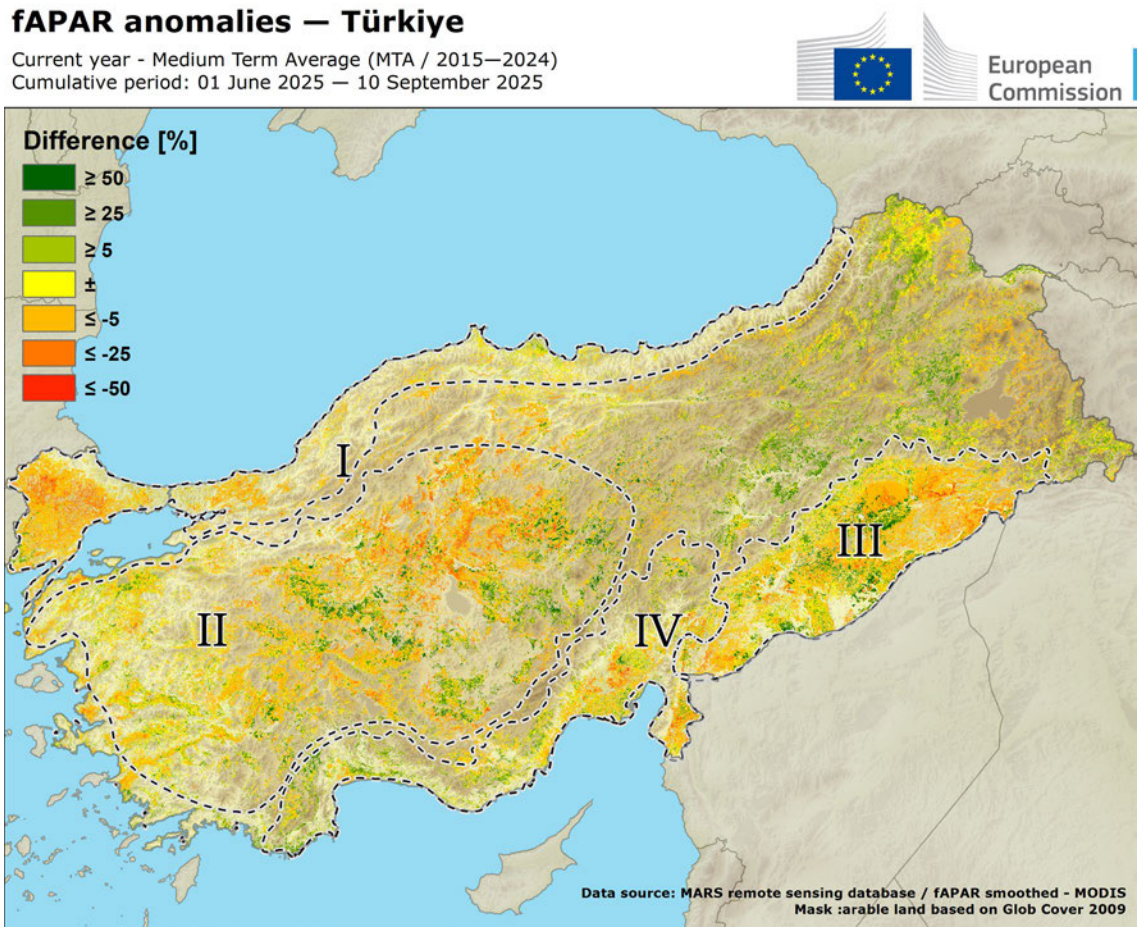
In Türkiye, drought conditions persisted throughout most of the agricultural season. In south-eastern Anatolia, winter crops were already suffering from dry conditions in early spring. In western and central Anatolia, winter crops entered their reproductive stages in May, with yield expectations still favourable despite the dry winter. Since then, rainfall has been scarce again, and repeated heatwaves have further exacerbated soil moisture deficits. While the impacts in June were still limited mainly to western Anatolia, by July winter crops in central and eastern Anatolia and the main agricultural regions along the Black Sea were also showing impacts of the water deficit. Furthermore, the availability of water for irrigation was insufficient to sustain the full yield potential of summer crops and to mitigate the effects of the repeated summer heatwaves, reducing yield expectations for soybean and maize in western and south-eastern Anatolia and in the Mediterranean region.

Our yield forecasts for winter crops that were harvested by July remain unchanged below the five-year average at – 5.6 % for barley, – 10.7 % for durum wheat and – 4.1 % for soft wheat. Summer crops – namely grain maize and soybean – are now in the reproductive to maturity stages, and our forecasts are well below the 2024 yields, by – 7.3 % and – 6.8 % respectively. Forecasts for grain maize yields are in line with the five-year average but well below the long-term trend (– 8.2 %). Given the overall advanced stages of summer crop development across the country, we do not expect that incoming weather conditions could bring major changes in yield expectations. The regions where winter and summer crops suffered drought impacts are identified in the 'Areas of concern – impacts' map.

Yield forecasts for Türkiye - 22 September 2025 Bulletin

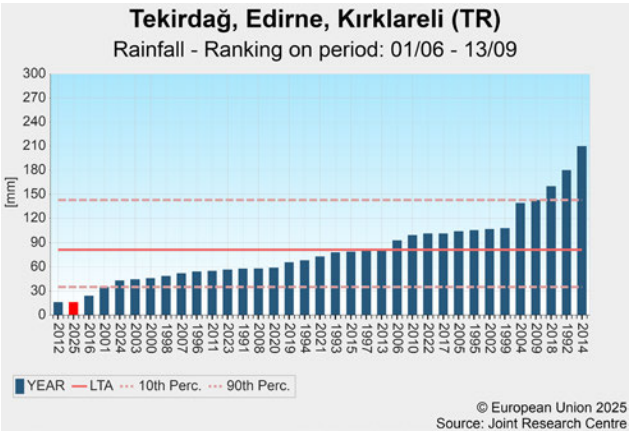
Crop	Area (x 1000 ha)					Yield (t/ha)					Production (x 1000 t)				
	Avg 5yrs	2024	2025	%25/5yrs	%25/24	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	Avg 5yrs	2024	2025	%25/5yrs	%25/24
Wheat	6 779	6 925	**6 925**	+ 2	+ 0	2.97	3.00	**2.81**	– 5	– 6	20 146	20 809	**19 468**	– 3	– 6
Soft wheat	5 540	5 619	**5 619**	+ 1	+ 0	2.93	2.92	**2.81**	– 4	– 4	16 225	16 408	**15 779**	– 3	– 4
Durum wheat	1 239	1 306	**1 306**	+ 5	+ 0	3.16	3.37	**2.83**	– 11	– 16	3 920	4 401	**3 689**	– 6	– 16
Barley	3 043	3 131	**3 131**	+ 3	+ 0	2.49	2.49	**2.35**	– 6	– 6	7 575	7 796	**7 358**	– 3	– 6
Grain maize	821	789	**789**	– 4	+ 0	9.46	10.3	**9.51**	+ 1	– 7	7 769	8 099	**7 506**	– 3	– 7
Soybean	39	44	**44**	+ 13	+ 0	4.19	4.12	**3.84**	– 8	– 7	162	180	**168**	+ 4	– 7

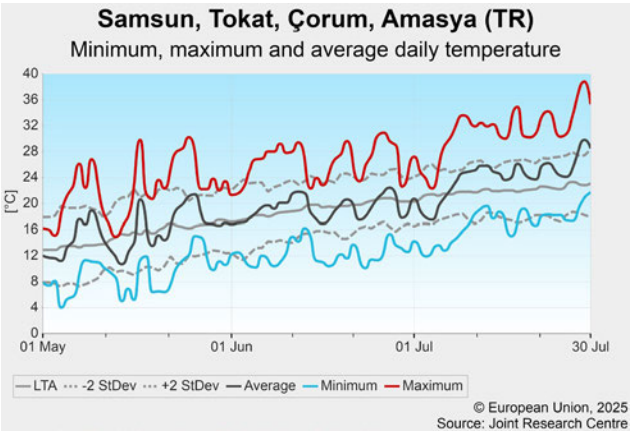
Sources: 2020-2025 data come from Turkish Statistical Institute (TurkStat) and Eurostat Eurobase (last update: 08.09.2025).
The column header '%25/5yrs' stands for the 2025 change with respect to the 5-year average(%). Similarly, '%25/24' stands for the 2025 change with respect to 2024(%).



Black Sea region (I)

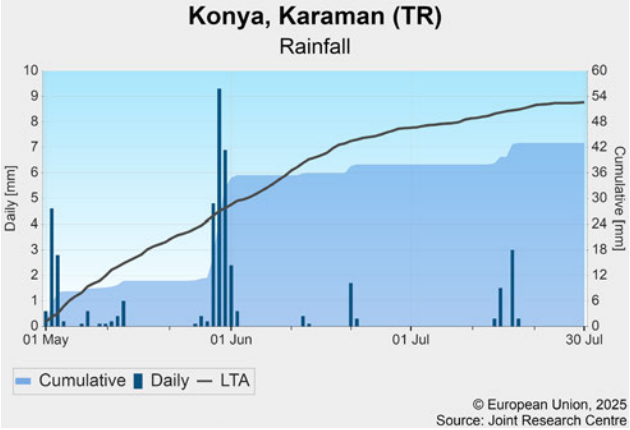
Along the Black Sea coast, winter crops faced an average to mediocre season. In *Tekirdağ* in the west, winter crops reached flowering in early May, which was a delay compared with previous years, and notably compared with 2024. This delay, caused by a cold spell in early spring, turned out to be positive, as grain filling started during May, benefiting from the rain occurring then. After that, the weather turned hot and dry, but the impacts were limited to later stages. In the central regions, such as *Samsun*, winter crops flowered in late May, by when two warm spells had reduced crop fertility. Since then, precipitation has become scarce and temperatures have frequently exceeded seasonal averages, reducing soil moisture to suboptimal levels. As a consequence, the grain-filling phase of winter crops was shortened, and they matured earlier than usual, by mid July.

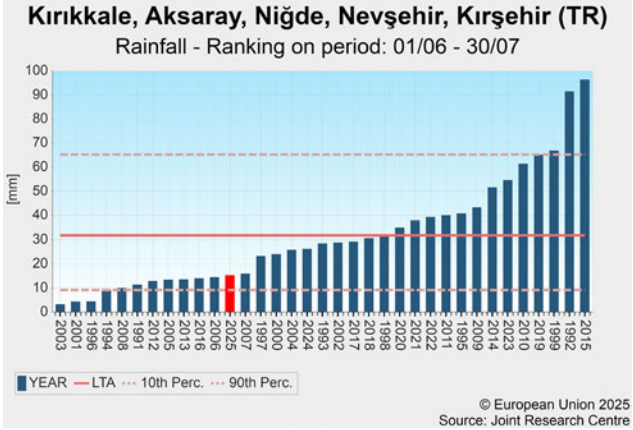


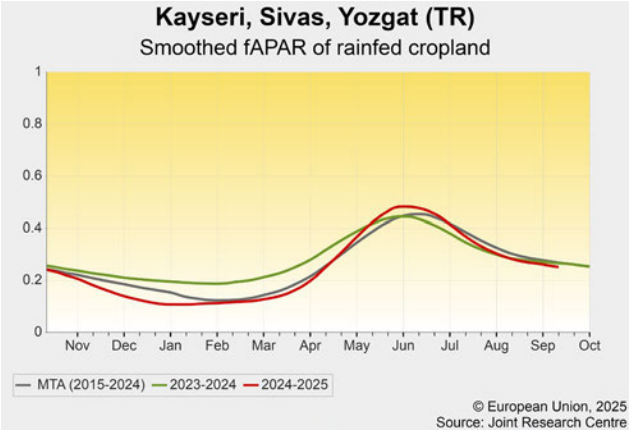


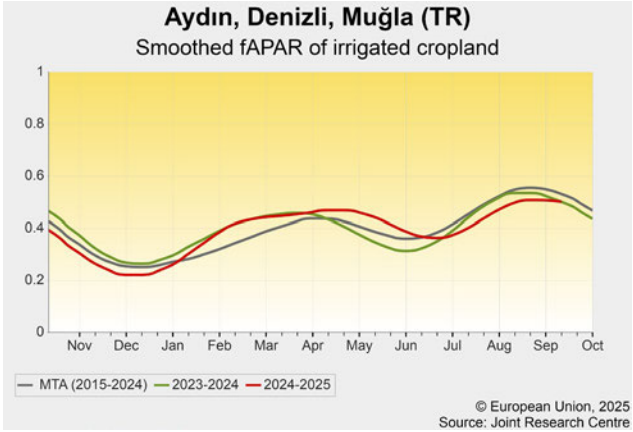
Western and central Anatolia (II)

In western Anatolia, winter crops had suffered from a dry and cold spring, delaying development and causing lower-than-average biomass accumulation. Well-distributed precipitation in May (e.g. in *Konya*) temporarily alleviated dry conditions and restored soil moisture to favourable levels, avoiding early crop senescence. After June, the weather turned dry again, and the depleted soil moisture compromised grain filling (e.g. in *Ankara*), lowering yield expectations just before the harvest. In central Anatolia, winter crops entered May under more favourable conditions, as the dry and cold spring did not affect them due to their late growth. As a consequence, winter crop biomass accumulation in June was above average, with good yield expectations. After that, temperatures increased and the weather turned dry (e.g. in *Kırıkkale*), reducing soil moisture. In July, a further increase in temperature shortened the grain-filling phase of winter crops (e.g. in *Kayseri*), significantly reducing yield expectations. Among the summer crops considered here, grain maize is concentrated in the west (e.g. in *Aydın*, *Manisa*), where maize growth was limited by a combination of high temperatures and low precipitation. Water levels in reservoirs had been low since the start of spring, so that irrigation water during summer was insufficient to maintain good biomass accumulation and to mitigate heat stress. Therefore, our summer crop yield expectations for western and central Anatolia remain below average.



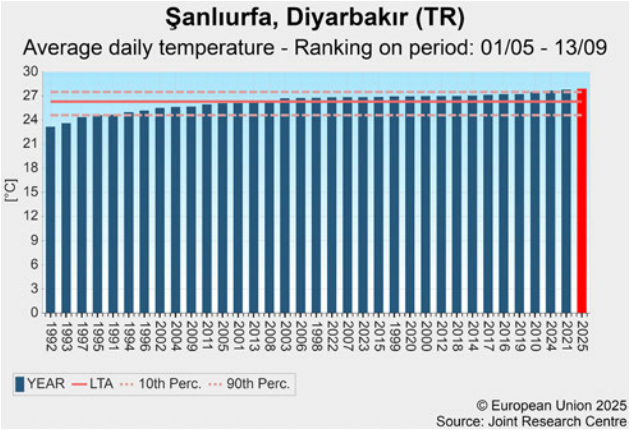


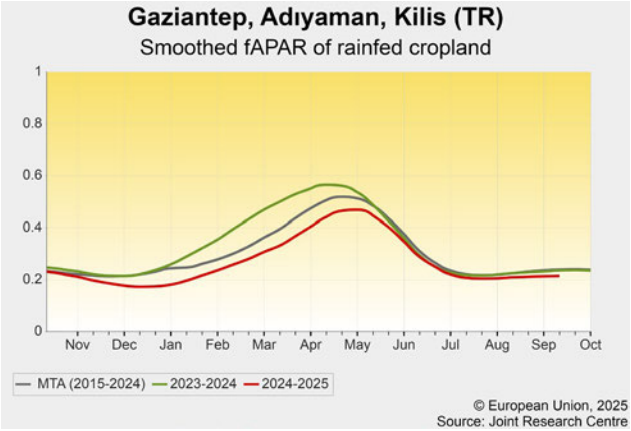


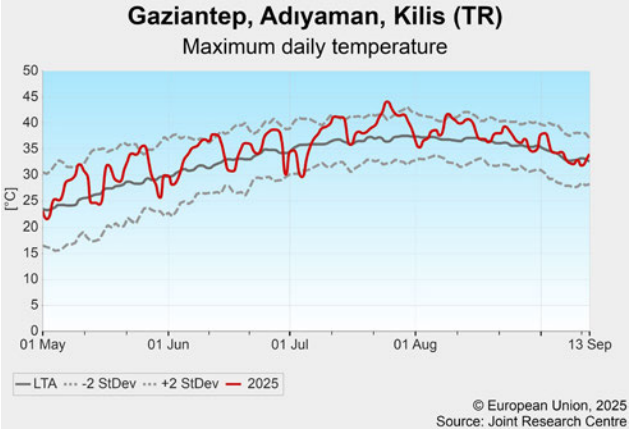


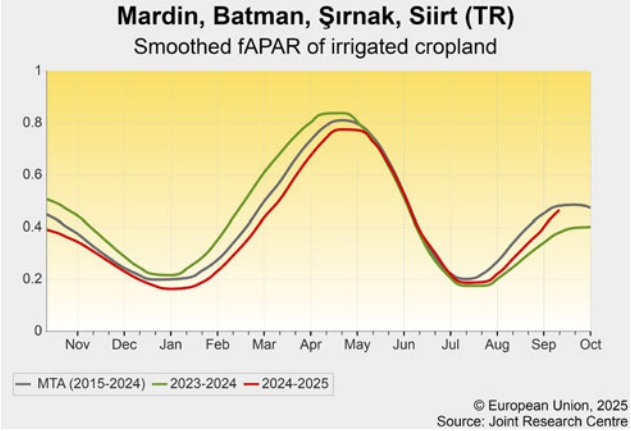
South-eastern Anatolia (III)

In south-eastern Anatolia, drought conditions dominated the whole winter crop season. Biomass accumulation was already below average in spring, even though the scarce precipitation was partially compensated for by early irrigation. Since May, temperatures gradually increased, and they became very hot in June, with maximum temperatures often above 35 °C. In *Şanlıurfa* and *Mardin*, irrigation prevented early senescence of winter crops, while in *Gaziantep* early senescence had already occurred by June, due to the less-well-developed irrigation infrastructure. By the end of June, most winter crops had been harvested in all regions, with average to low yield expectations. The summer crop season started with little water availability for irrigation, and the second crop cycle, usually associated with summer crops, showed a late start and below-average biomass accumulation. Very high temperatures in July were unfavourable for the development of soybean, the most important summer crop in the region. During August, the weather was dry and hot as usual, and in most areas summer crops reached flowering in late August under suboptimal conditions. In *Mardin*, summer crops have not yet reached flowering and, despite the low biomass accumulation so far, average yields remain possible. However, our overall yield expectations for summer crops in south-eastern Anatolia remain low.



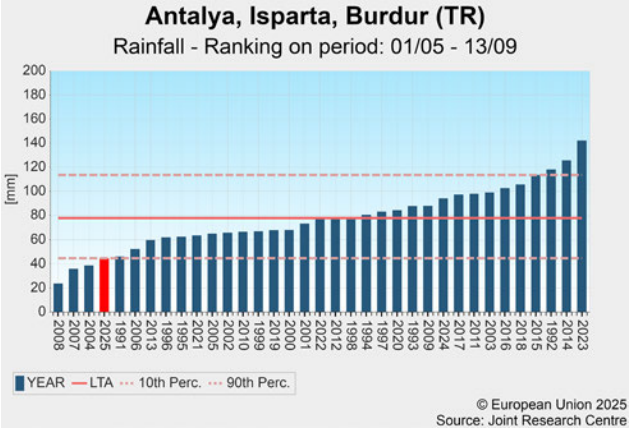


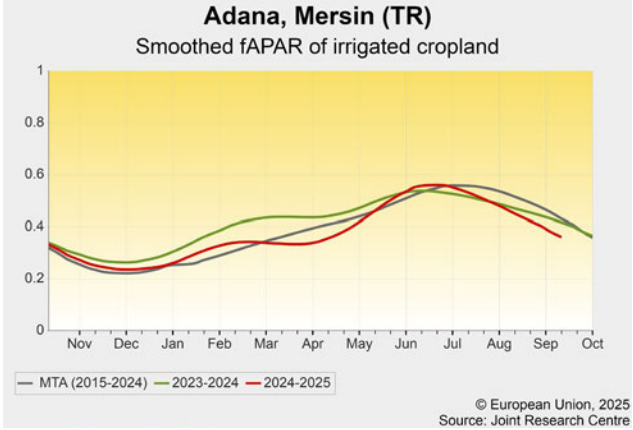


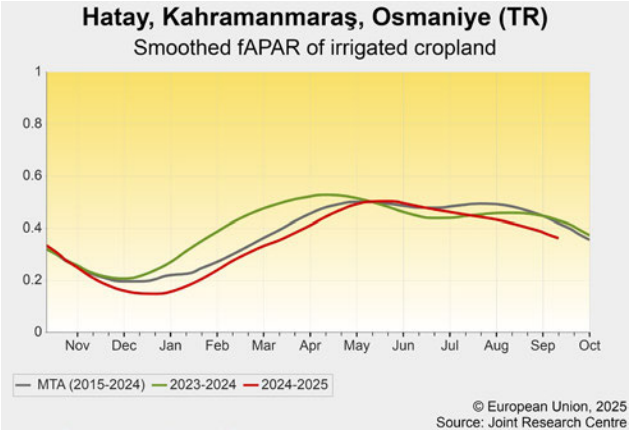


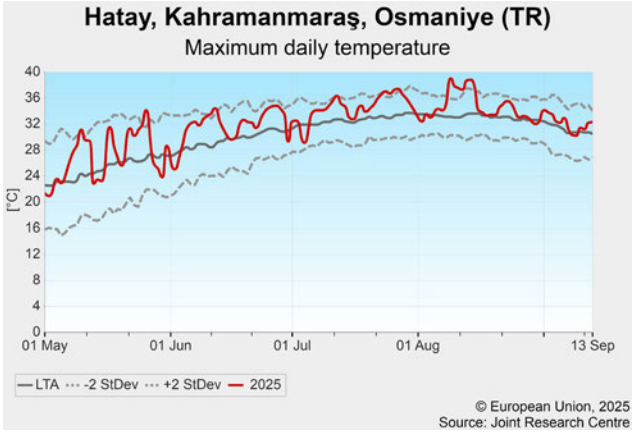
Mediterranean regions (IV)

Türkiye's Mediterranean region faced a mixed season. Western areas (e.g. *Antalya*) experienced a close-to-average season. Precipitation was generally below average but still sufficient to sustain winter crop development until the end of May, when flowering occurred. In June, temperatures increased and remained above average for several days. The acceleration of senescence became visible by the end of June, and crops reached maturity slightly earlier than usual in July, with average yield expectations. The eastern areas (e.g. *Adana* and *Hatay*) are the most important for grain maize production at the national level. They faced a very dry and cold spring, delaying both winter crops and the first cycle of maize. Our analysis of the fAPAR signal in irrigated areas in *Adana* and *Hatay* suggests a shift in maize production from the spring to the summer cycle. The summer cycle had to be fully sustained by irrigation and was well developed until mid June, when crops flowered. After that, temperatures increased, weather turned dry and water for irrigation became less available. From July onward, temperatures remained constantly above the average, and most notably in the easternmost regions (e.g. *Hatay*), where maximum temperatures were around 35 °C. Here, even irrigated crops faced suboptimal grain filling and early senescence. During August, the senescence of crops continued without any relief from the hot and dry weather. Overall, our yield expectations for summer crops remain low.



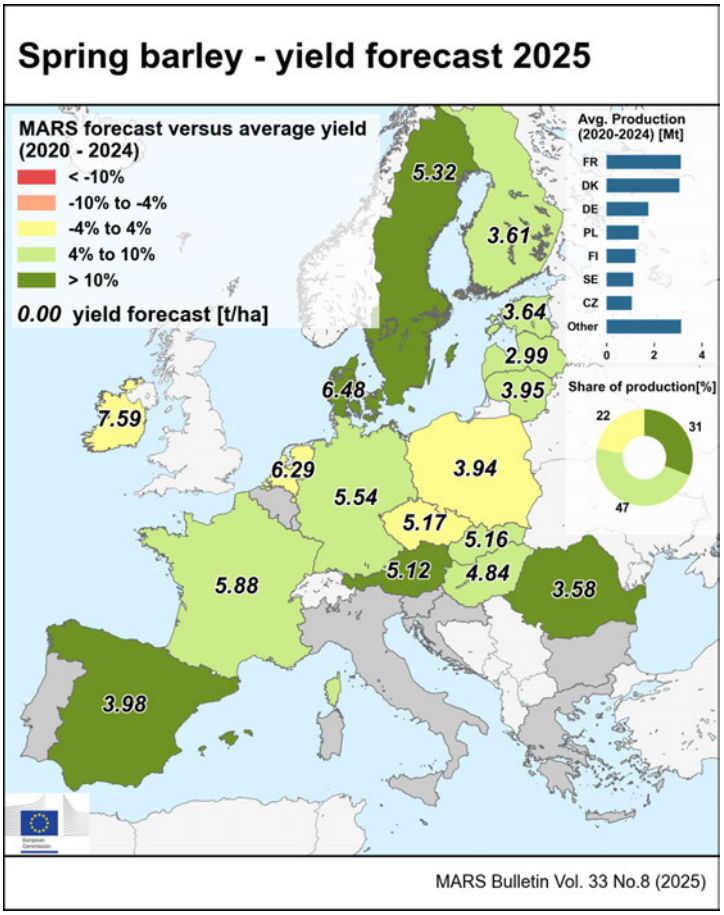




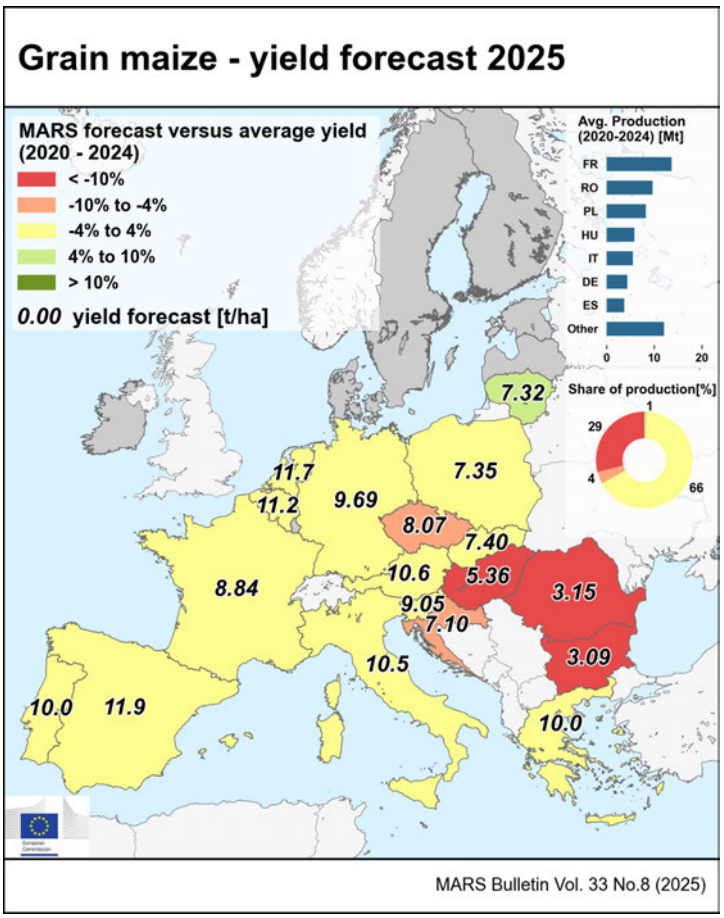


6. Crop yield forecast

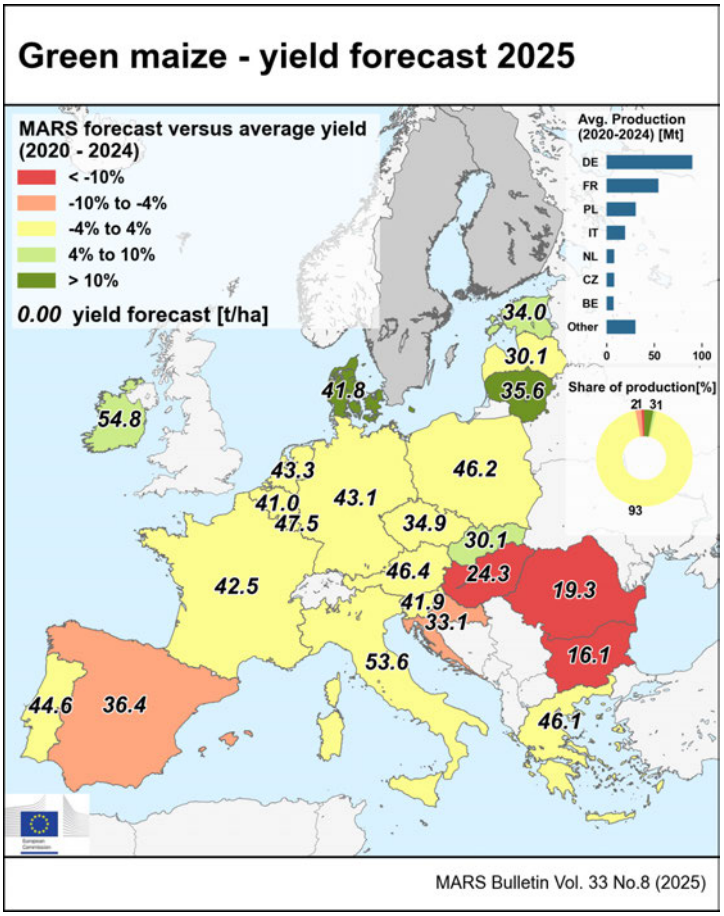
Country	Spring barley (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	4.66	4.71	**5.15**	+ 11	+ 9	+ 3
AT	4.62	4.74	**5.12**	+ 11	+ 8	+ 3
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	5.18	5.42	**5.17**	– 0	– 5	+ 3
DE	5.12	5.19	**5.54**	+ 8	+ 7	+ 8
DK	5.71	5.45	**6.48**	+ 13	+ 19	+ 5
EE	3.34	3.01	**3.64**	+ 9	+ 21	+ 0
EL	—	—	—	—	—	—
ES*	2.59	3.28	**3.98**	+ 53	+ 21	+ 0
FI	3.34	3.62	**3.61**	+ 8	– 0	+ 4
FR	5.36	5.21	**5.88**	+ 10	+ 13	+ 0
HR	—	—	—	—	—	—
HU	4.50	4.44	**4.84**	+ 7	+ 9	+ 0
IE	7.32	7.32	**7.59**	+ 4	+ 4	+ 0
IT	—	—	—	—	—	—
LT	3.69	3.63	**3.95**	+ 7	+ 9	+ 0
LU	—	—	—	—	—	—
LV	2.87	2.67	**2.99**	+ 4	+ 12	– 2
MT	—	—	—	—	—	—
NL	6.15	5.93	**6.29**	+ 2	+ 6	+ 0
PL	3.87	3.84	**3.94**	+ 2	+ 3	+ 0
PT	—	—	—	—	—	—
RO	2.44	3.22	**3.58**	+ 47	+ 11	+ 10
SE	4.38	4.36	**5.32**	+ 21	+ 22	+ 11
SI	—	—	—	—	—	—
SK	4.79	4.54	**5.16**	+ 8	+ 14	+ 5



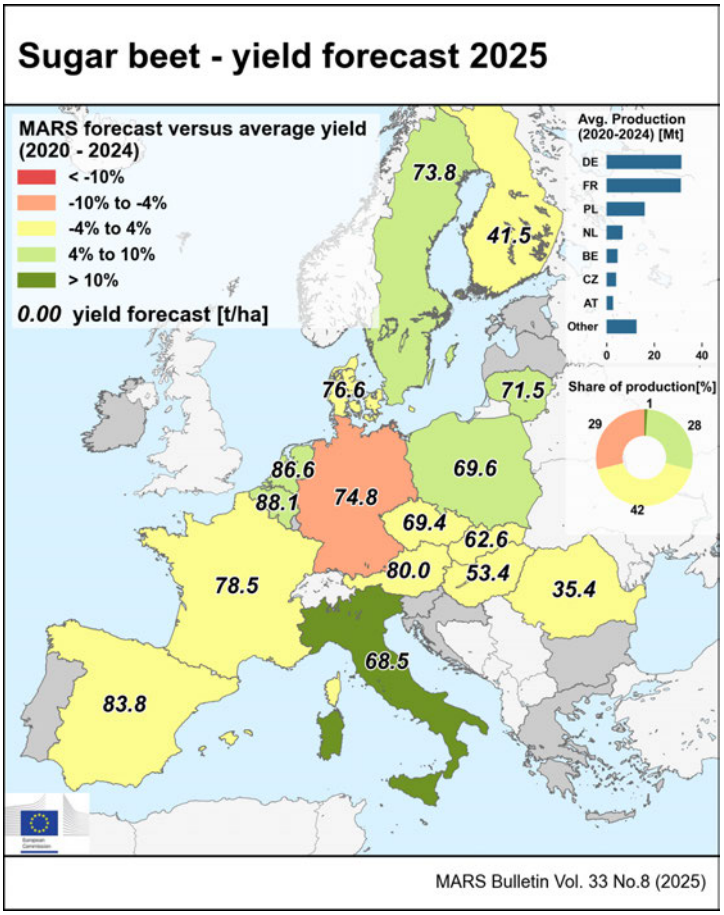
Country	Grain maize (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	7.10	6.79	**6.88**	– 3	+ 1	– 1
AT	10.4	9.90	**10.6**	+ 2	+ 7	– 1
BE	11.1	12.0	**11.2**	+ 1	– 7	– 0
BG	4.74	3.18	**3.09**	– 35	– 3	– 5
CY	—	—	—	—	—	—
CZ	8.70	8.14	**8.07**	– 7	– 1	– 4
DE	9.61	10.1	**9.69**	+ 1	– 4	+ 1
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	10.4	9.20	**10.0**	– 4	+ 9	+ 0
ES	12.1	11.8	**11.9**	– 2	+ 0	+ 0
FI	—	—	—	—	—	—
FR	8.93	9.30	**8.84**	– 1	– 5	+ 1
HR	7.51	7.69	**7.10**	– 5	– 8	+ 0
HU	6.48	5.97	**5.36**	– 17	– 10	– 5
IE	—	—	—	—	—	—
IT	10.1	9.94	**10.5**	+ 3	+ 5	+ 3
LT	6.67	7.87	**7.32**	+ 10	– 7	+ 0
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	11.6	11.0	**11.7**	+ 1	+ 6	– 1
PL	7.29	7.36	**7.35**	+ 1	– 0	+ 2
PT	9.87	10.1	**10.0**	+ 1	– 1	+ 0
RO	4.02	2.86	**3.15**	– 22	+ 10	– 6
SE	—	—	—	—	—	—
SI	8.95	9.20	**9.05**	+ 1	– 2	+ 2
SK	7.20	7.23	**7.40**	+ 3	+ 2	– 4



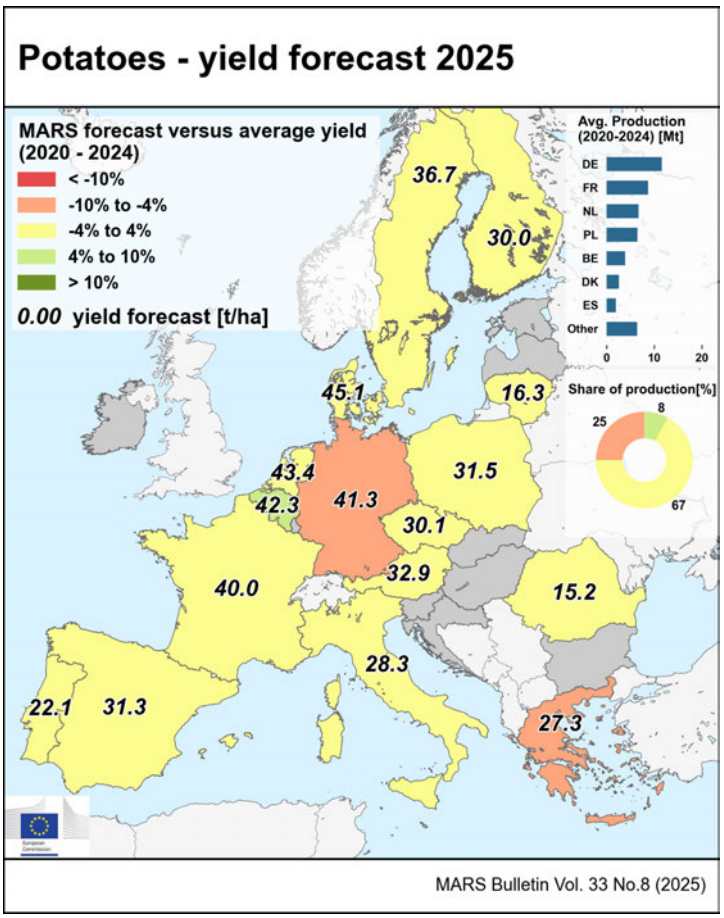
Country	Green maize (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU**	42.5	43.6	**42.7**	+ 1	– 2	+ 0
AT	46.0	45.3	**46.4**	+ 1	+ 2	+ 1
BE	41.6	41.4	**41.0**	– 2	– 1	– 2
BG	20.0	16.1	**16.1**	– 19	+ 0	– 2
CY	—	—	**—**	—	—	—
CZ	35.6	31.9	**34.9**	– 2	+ 9	– 6
DE	42.5	44.4	**43.1**	+ 1	– 3	+ 1
DK	37.8	39.5	**41.8**	+ 11	+ 6	+ 4
EE	31.8	34.9	**34.0**	+ 7	– 2	– 7
EL	46.5	45.7	**46.1**	– 1	+ 1	+ 0
ES	38.2	45.9	**36.4**	– 5	– 21	– 1
FI	—	—	**—**	—	—	—
FR	42.4	44.9	**42.5**	+ 0	– 5	+ 1
HR	34.8	35.6	**33.1**	– 5	– 7	+ 1
HU	27.0	28.3	**24.3**	– 10	– 14	– 0
IE	52.4	53.9	**54.8**	+ 5	+ 2	+ 0
IT	52.6	52.8	**53.6**	+ 2	+ 2	+ 0
LT	28.9	31.9	**35.6**	+ 23	+ 11	+ 0
LU	48.5	51.2	**47.5**	– 2	– 7	+ 0
LV	30.0	29.3	**30.1**	+ 0	+ 3	+ 0
MT	—	—	**—**	—	—	—
NL	43.6	40.7	**43.3**	– 1	+ 6	– 2
PL	47.0	46.4	**46.2**	– 2	– 0	– 1
PT	44.6	44.5	**44.6**	– 0	+ 0	+ 0
RO	22.2	18.4	**19.3**	– 13	+ 5	– 2
SE	—	—	**—**	—	—	—
SI	41.7	43.7	**41.9**	+ 0	– 4	+ 3
SK	28.7	28.1	**30.1**	+ 5	+ 7	+ 0



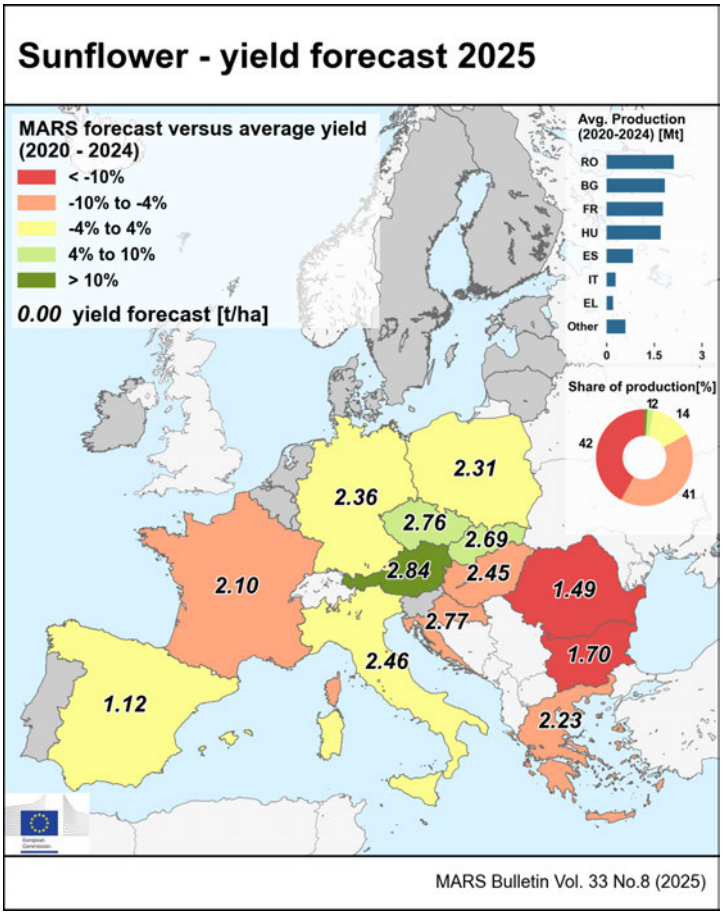
Country	Sugar beet (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	73.6	75.8	**74.8**	+ 2	– 1	+ 0
AT	78.8	79.9	**80.0**	+ 2	+ 0	+ 1
BE	83.1	75.4	**88.1**	+ 6	+ 17	+ 1
BG	—	—	**—**	—	—	—
CY	—	—	**—**	—	—	—
CZ	66.8	69.6	**69.4**	+ 4	– 0	+ 0
DE	78.3	83.9	**74.8**	– 4	– 11	+ 0
DK	75.8	77.0	**76.6**	+ 1	– 1	+ 0
EE	—	—	**—**	—	—	—
EL	—	—	**—**	—	—	—
ES	84.0	83.6	**83.8**	– 0	+ 0	+ 0
FI	40.9	47.6	**41.5**	+ 1	– 13	+ 0
FR	77.0	79.1	**78.5**	+ 2	– 1	– 1
HR	—	—	**—**	—	—	—
HU	55.6	50.5	**53.4**	– 4	+ 6	– 2
IE	—	—	**—**	—	—	—
IT	57.8	59.7	**68.5**	+ 19	+ 15	+ 7
LT	66.3	69.9	**71.5**	+ 8	+ 2	– 0
LU	—	—	**—**	—	—	—
LV	—	—	**—**	—	—	—
MT	—	—	**—**	—	—	—
NL	82.5	75.5	**86.6**	+ 5	+ 15	+ 1
PL	63.5	66.4	**69.6**	+ 10	+ 5	+ 2
PT	—	—	**—**	—	—	—
RO	34.8	33.5	**35.4**	+ 2	+ 6	+ 5
SE	67.8	74.4	**73.8**	+ 9	– 1	+ 0
SI	—	—	**—**	—	—	—
SK	60.4	59.0	**62.6**	+ 4	+ 6	+ 0



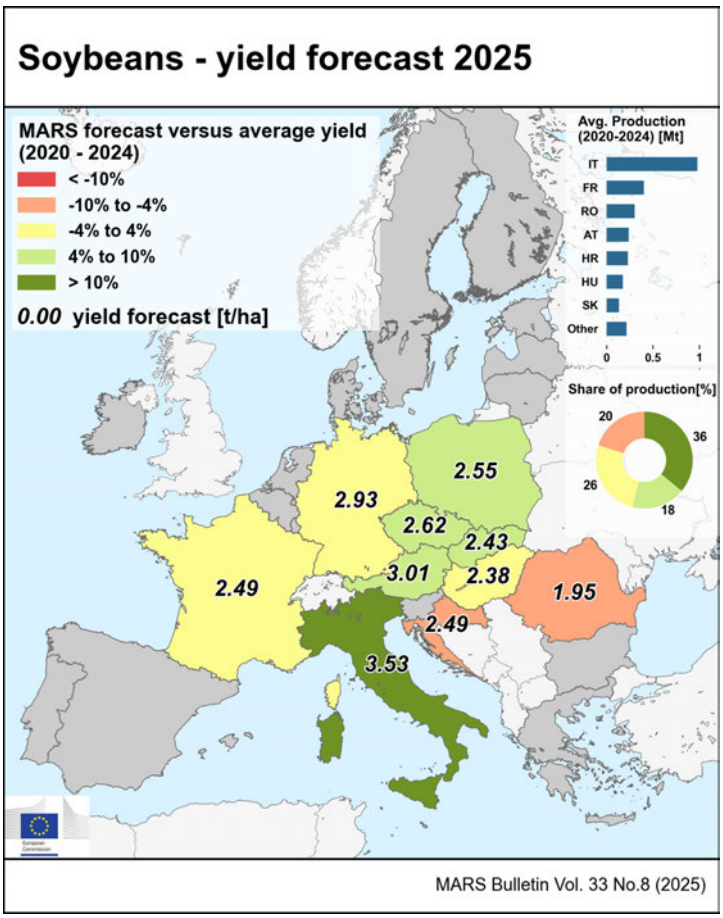
Country	Potatoes (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	36.4	36.7	**36.5**	+ 0	– 0	– 1
AT	32.8	31.7	**32.9**	+ 0	+ 4	– 0
BE	40.7	39.2	**42.3**	+ 4	+ 8	+ 0
BG	—	—	**—**	—	—	—
CY	—	—	**—**	—	—	—
CZ	29.0	28.8	**30.1**	+ 4	+ 5	+ 0
DE	43.1	45.0	**41.3**	– 4	– 8	– 1
DK	44.0	44.2	**45.1**	+ 2	+ 2	+ 0
EE	—	—	**—**	—	—	—
EL	28.7	25.9	**27.3**	– 5	+ 6	+ 0
ES	31.6	29.8	**31.3**	– 1	+ 5	– 0
FI	29.3	31.2	**30.0**	+ 2	– 4	+ 0
FR	41.1	41.9	**40.0**	– 3	– 5	– 2
HR	—	—	**—**	—	—	—
HU	—	—	**—**	—	—	—
IE	—	—	**—**	—	—	—
IT	28.9	28.8	**28.3**	– 2	– 2	+ 0
LT	15.9	18.1	**16.3**	+ 2	– 10	+ 0
LU	—	—	**—**	—	—	—
LV	—	—	**—**	—	—	—
MT	—	—	**—**	—	—	—
NL	42.2	41.7	**43.4**	+ 3	+ 4	+ 0
PL	31.2	30.2	**31.5**	+ 1	+ 4	– 2
PT	23.0	22.0	**22.1**	– 4	+ 0	+ 0
RO	15.3	12.5	**15.2**	– 1	+ 22	+ 3
SE	35.8	35.6	**36.7**	+ 3	+ 3	+ 0
SI	—	—	**—**	—	—	—
SK	—	—	**—**	—	—	—



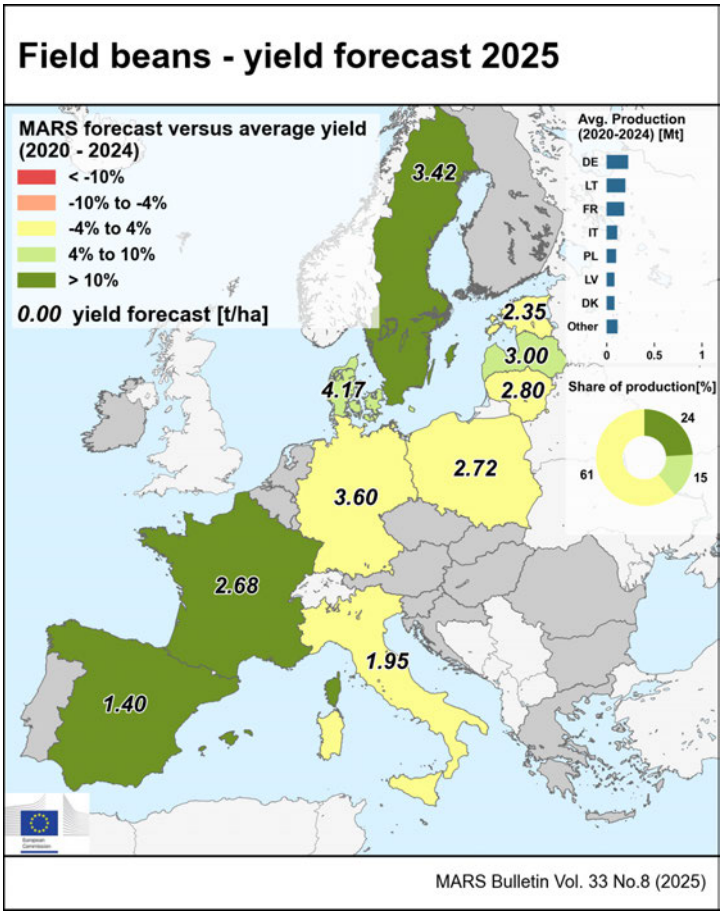
Country	Sunflower (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	2.02	1.72	**1.81**	– 10	+ 5	– 1
AT	2.56	2.36	**2.84**	+ 11	+ 20	+ 8
BE	—	—	**—**	—	—	—
BG	2.10	1.73	**1.70**	– 19	– 2	– 3
CY	—	—	**—**	—	—	—
CZ	2.63	2.50	**2.76**	+ 5	+ 10	+ 0
DE	2.29	2.61	**2.36**	+ 3	– 10	+ 2
DK	—	—	**—**	—	—	—
EE	—	—	**—**	—	—	—
EL	2.36	2.07	**2.23**	– 6	+ 7	+ 0
ES	1.12	1.12	**1.12**	– 0	+ 0	+ 0
FI	—	—	**—**	—	—	—
FR	2.26	1.95	**2.10**	– 7	+ 8	– 5
HR	2.92	2.97	**2.77**	– 5	– 7	+ 0
HU	2.58	2.67	**2.45**	– 5	– 8	– 0
IE	—	—	**—**	—	—	—
IT	2.46	2.59	**2.46**	+ 0	– 5	+ 0
LT	—	—	**—**	—	—	—
LU	—	—	**—**	—	—	—
LV	—	—	**—**	—	—	—
MT	—	—	**—**	—	—	—
NL	—	—	**—**	—	—	—
PL	2.37	2.45	**2.31**	– 3	– 6	– 1
PT	—	—	**—**	—	—	—
RO	1.86	1.18	**1.49**	– 20	+ 26	+ 0
SE	—	—	**—**	—	—	—
SI	—	—	**—**	—	—	—
SK	2.56	2.50	**2.69**	+ 5	+ 8	+ 0



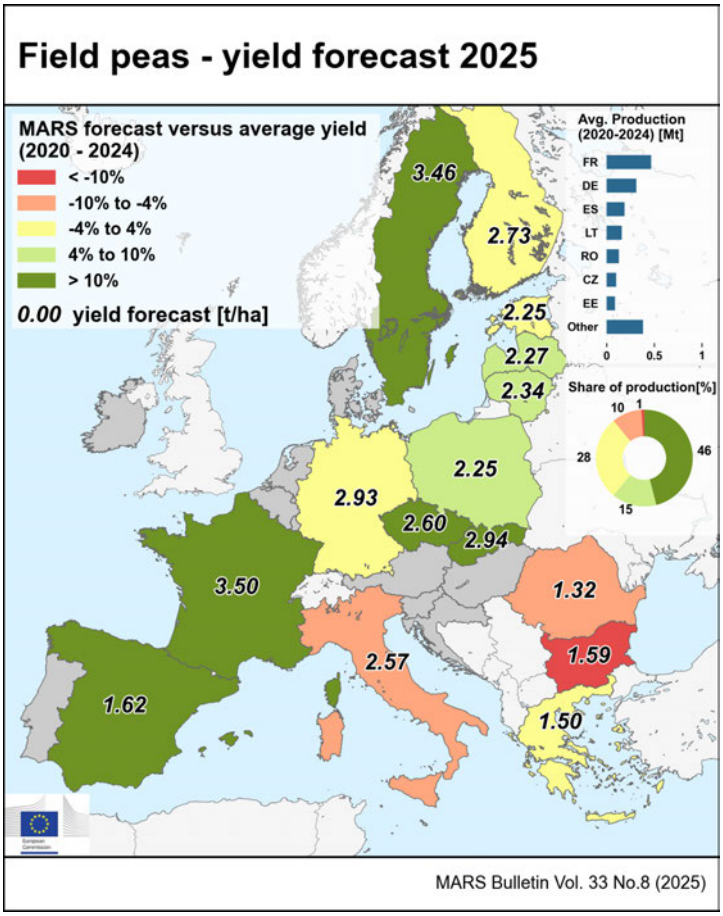
Country	Soybeans (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	2.67	2.67	**2.79**	+ 4	+ 4	+ 2
AT	2.88	2.74	**3.01**	+ 5	+ 10	+ 3
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	2.45	2.60	**2.62**	+ 7	+ 1	+ 12
DE	2.83	3.25	**2.93**	+ 4	– 10	+ 1
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	—	—	—	—	—	—
ES	—	—	—	—	—	—
FI	—	—	—	—	—	—
FR	2.40	2.60	**2.49**	+ 4	– 4	+ 1
HR	2.61	2.48	**2.49**	– 5	+ 0	+ 0
HU	2.47	2.23	**2.38**	– 3	+ 7	+ 5
IE	—	—	—	—	—	—
IT	3.19	3.21	**3.53**	+ 10	+ 10	+ 1
LT	—	—	—	—	—	—
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.44	2.56	**2.55**	+ 5	– 0	+ 0
PT	—	—	—	—	—	—
RO	2.07	2.03	**1.95**	– 6	– 4	+ 0
SE	—	—	—	—	—	—
SI	—	—	—	—	—	—
SK	2.22	2.20	**2.43**	+ 9	+ 11	+ 0



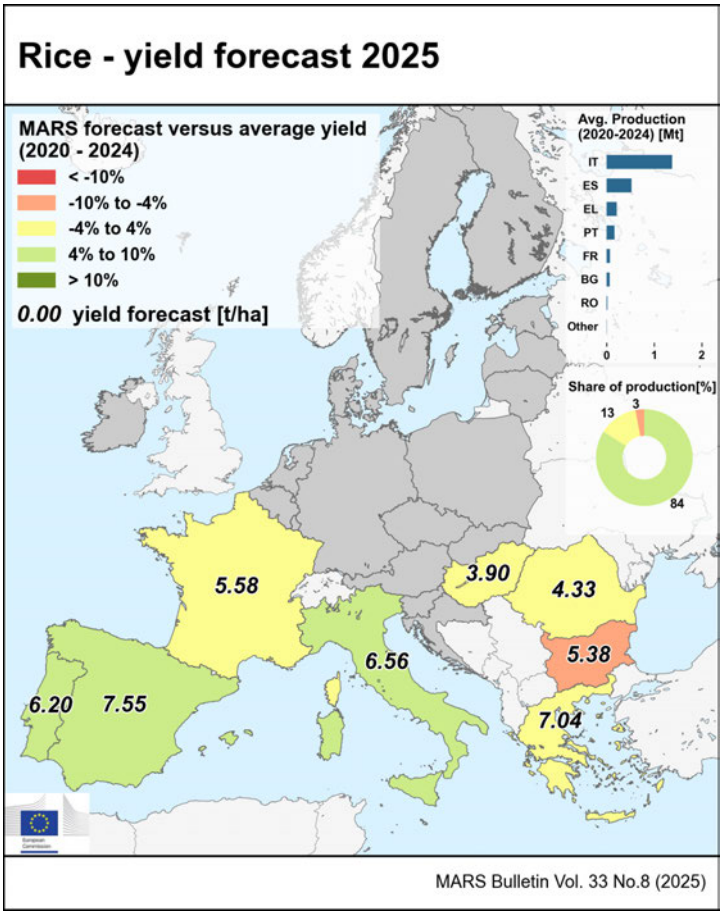
Country	Field beans (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	2.68	2.78	**2.79**	+ 4	+ 1	– 1
AT	—	—	—	—	—	—
BE	—	—	—	—	—	—
BG	—	—	—	—	—	—
CY	—	—	—	—	—	—
CZ	—	—	—	—	—	—
DE	3.68	3.96	**3.60**	– 2	– 9	+ 0
DK	3.87	4.03	**4.17**	+ 8	+ 3	+ 0
EE	2.29	2.90	**2.35**	+ 3	– 19	+ 11
EL	—	—	—	—	—	—
ES	1.17	1.42	**1.40**	+ 19	– 1	+ 0
FI	—	—	—	—	—	—
FR	2.41	2.70	**2.68**	+ 11	– 1	– 4
HR	—	—	—	—	—	—
HU	—	—	—	—	—	—
IE	—	—	—	—	—	—
IT	1.95	2.11	**1.95**	+ 0	– 8	+ 0
LT	2.75	2.59	**2.80**	+ 2	+ 8	+ 0
LU	—	—	—	—	—	—
LV	2.79	2.97	**3.00**	+ 8	+ 1	– 5
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.75	2.54	**2.72**	– 1	+ 7	+ 0
PT	—	—	—	—	—	—
RO	—	—	—	—	—	—
SE	2.91	3.18	**3.42**	+ 18	+ 7	+ 4
SI	—	—	—	—	—	—
SK	—	—	—	—	—	—



Country	Field peas (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU* **	2.20	2.05	**2.32**	+ 6	+ 13	+ 1
AT	—	—	—	—	—	—
BE	—	—	—	—	—	—
BG	1.90	1.59	**1.59**	– 16	+ 0	+ 0
CY	—	—	—	—	—	—
CZ	2.35	1.67	**2.60**	+ 10	+ 56	+ 0
DE	2.92	2.91	**2.93**	+ 0	+ 1	+ 2
DK	—	—	—	—	—	—
EE	2.25	2.37	**2.25**	– 0	– 5	+ 4
EL	1.56	1.48	**1.50**	– 4	+ 2	+ 0
ES	1.20	1.33	**1.62**	+ 34	+ 21	+ 0
FI	2.65	2.76	**2.73**	+ 3	– 1	+ 0
FR	2.91	2.83	**3.50**	+ 20	+ 24	– 1
HR	—	—	—	—	—	—
HU	—	—	—	—	—	—
IE	—	—	—	—	—	—
IT	2.78	2.58	**2.57**	– 7	– 0	+ 0
LT	2.17	2.20	**2.34**	+ 8	+ 7	+ 0
LU	—	—	—	—	—	—
LV	2.11	2.23	**2.27**	+ 8	+ 2	– 5
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	2.16	2.12	**2.25**	+ 4	+ 6	+ 0
PT	—	—	—	—	—	—
RO	1.45	1.01	**1.32**	– 10	+ 30	+ 0
SE	2.86	2.88	**3.46**	+ 21	+ 20	+ 12
SI	—	—	—	—	—	—
SK	2.29	1.71	**2.94**	+ 28	+ 72	+ 46



Country	Rice (t/ha)					
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24	% Diff September/ August
EU	6.31	6.29	**6.69**	+ 6	+ 6	—
AT	—	—	—	—	—	—
BE	—	—	—	—	—	—
BG	5.69	5.68	**5.38**	– 5	– 5	—
CY	—	—	—	—	—	—
CZ	—	—	—	—	—	—
DE	—	—	—	—	—	—
DK	—	—	—	—	—	—
EE	—	—	—	—	—	—
EL	6.91	4.56	**7.04**	+ 2	+ 54	—
ES	6.92	6.89	**7.55**	+ 9	+ 10	—
FI	—	—	—	—	—	—
FR	5.50	5.46	**5.58**	+ 2	+ 2	—
HR	—	—	—	—	—	—
HU	3.80	3.68	**3.90**	+ 3	+ 6	—
IE	—	—	—	—	—	—
IT	6.20	6.41	**6.56**	+ 6	+ 2	—
LT	—	—	—	—	—	—
LU	—	—	—	—	—	—
LV	—	—	—	—	—	—
MT	—	—	—	—	—	—
NL	—	—	—	—	—	—
PL	—	—	—	—	—	—
PT	5.90	6.21	**6.20**	+ 5	– 0	—
RO	4.22	5.36	**4.33**	+ 3	– 19	—
SE	—	—	—	—	—	—
SI	—	—	—	—	—	—
SK	—	—	—	—	—	—



Country	Wheat (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
TR	2.97	3.00	**2.81**	– 5	– 6
UA	4.22	4.43	**4.16**	– 2	– 6

Country	Barley (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
TR	2.49	2.49	**2.35**	– 6	– 6
UA	3.51	3.68	**3.46**	– 1	– 6

Country	Grain maize (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
TR	9.46	10.3	**9.51**	+ 1	– 7
UA	6.77	6.53	**7.30**	+ 8	+ 12

Country	Soybean (t/ha)				
	Avg 5yrs	2024	MARS 2025 forecasts	%25/5yrs	%25/24
TR	4.19	4.12	**3.84**	– 8	– 7
UA	2.42	2.43	**2.54**	+ 5	+ 4

NB: Yields are forecast for crops with more than 10 000 ha (for rice more than 1 000 ha per country).

Sources: 2020-2025 data come from DG Agriculture and Rural Development short-term-outlook data (dated August 2025, received on 26.08.2025), Eurostat Eurobase (last update: 08.09.2025), ELSTAT (Greece), ISTAT, DESTATIS, Statistics Netherlands (CBS), Spanish Ministry, Agriculture Economic reasearch institute of Hungary, Ente Risi, National Statistical Institute of Portugal, Agreste.

Non-EU 2020-2024 data come from USDA, Turkish Statistical Institute (TurkStat), Eurostat Eurobase (last update: 08.09.2025), Ministry for Development of Economy, Trade and Agriculture of Ukraine and PSD-online.

The column header '%25/5yrs' stands for the 2025 change with respect to the five-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 "five-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.

** The EU figures do not include green maize forecasts for Sweden since recent data on yields were not consistent.

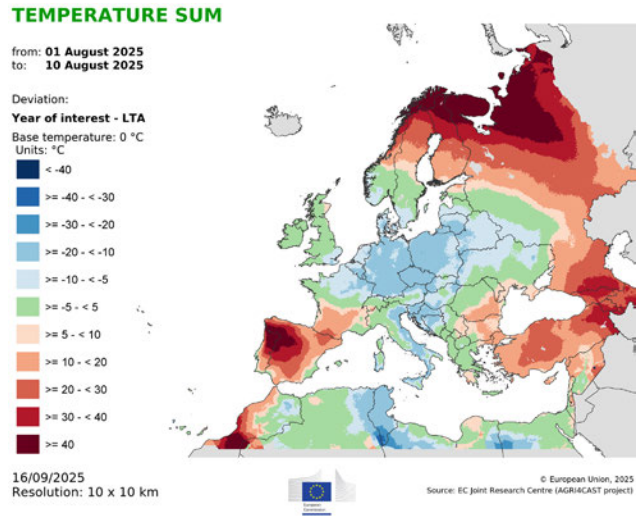
*** The EU figures do not include field peas forecasts for Portugal since the yield time series is missing.

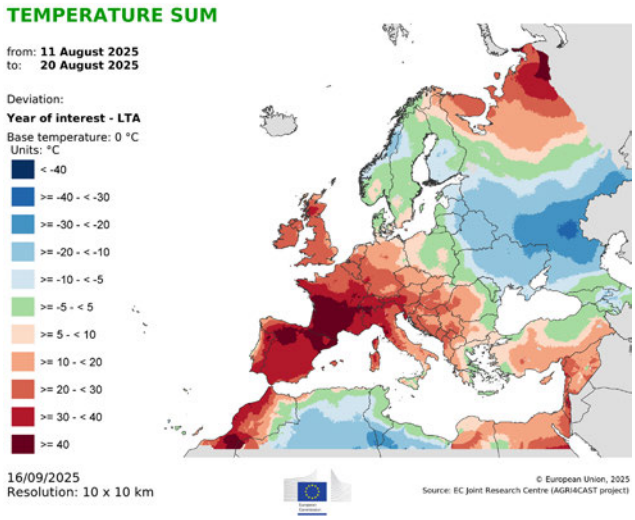
Cop name	Eurostat Crop name	Eurostat Crop Code	Official Eurostat Crop definition*
Total wheat	Wheat and spelt	C1100	Common wheat (*Triticum aestivum* L. emend. Fiori et Paol.), spelt (*Triticum spelta* L.), einkorn wheat (*Triticum monococcum* L.) and durum wheat (*Triticum durum* Desf.).
Total barley	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.).

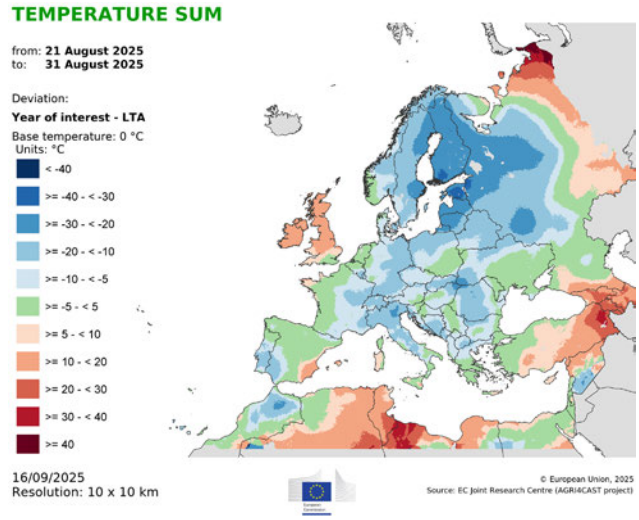
** Source:* Eurostat - Annual crop statistics (Handbook 2020 Edition)

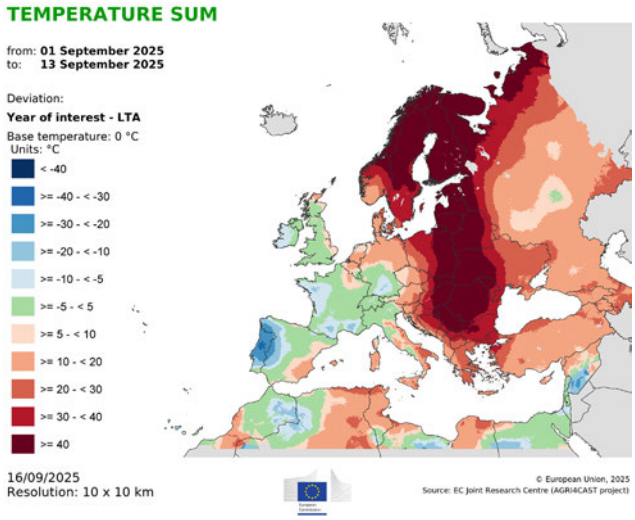
7. Atlas

Temperature regime

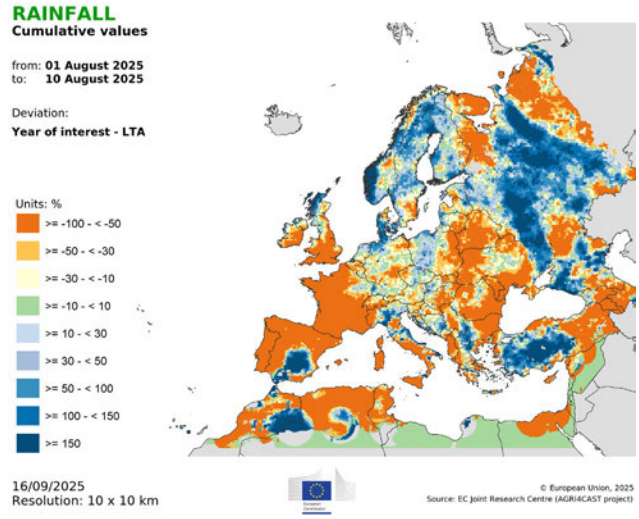


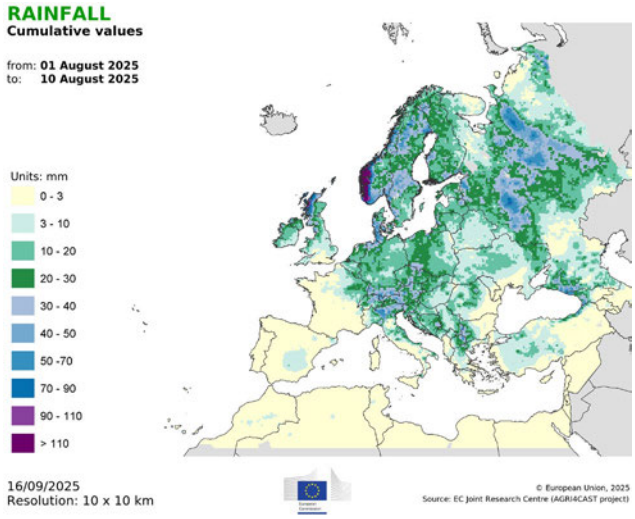






Precipitation



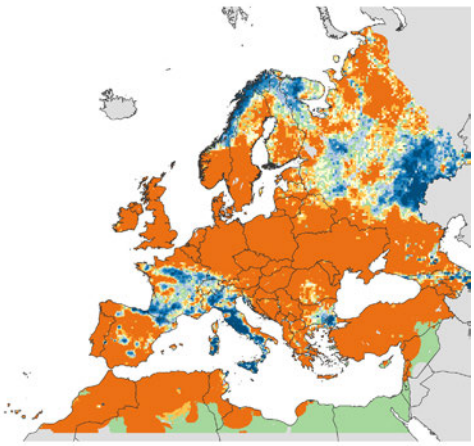


RAINFALL
Cumulative values

from: **11 August 2025**
to: **20 August 2025**

Deviation:
Year of interest - LTA

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

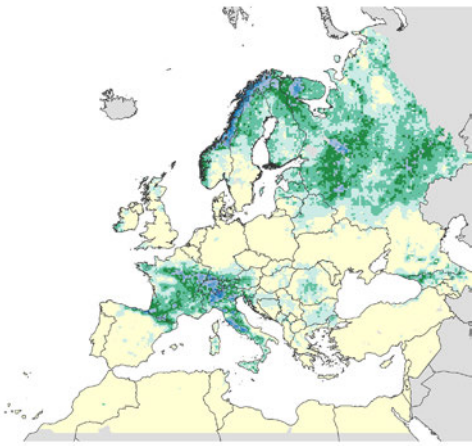


16/09/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

from: **11 August 2025**
to: **20 August 2025**

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



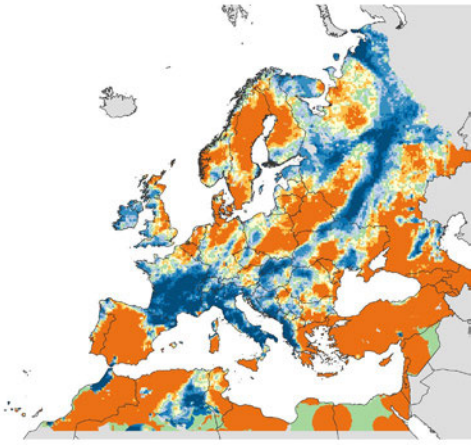
16/09/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

from: **21 August 2025**
to: **31 August 2025**

Deviation:
Year of interest - LTA

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

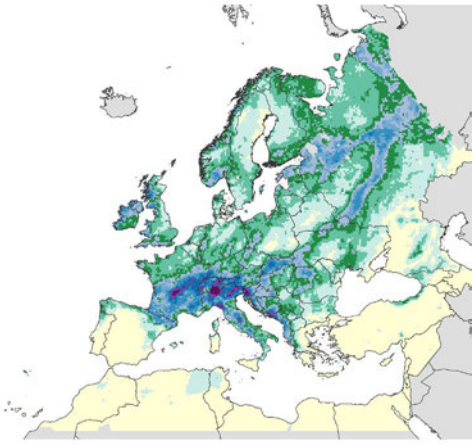


16/09/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

from: **21 August 2025**
to: **31 August 2025**

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



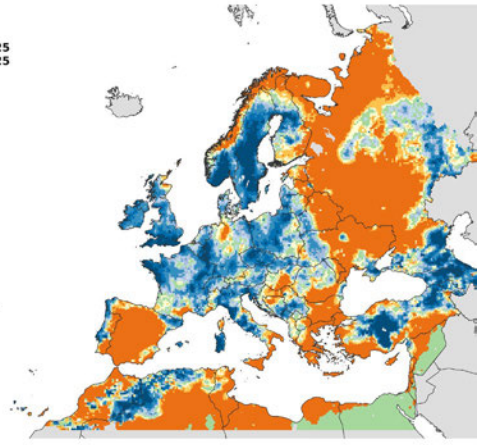
16/09/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

from: **01 September 2025**
to: **13 September 2025**

Deviation:
Year of interest - LTA

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

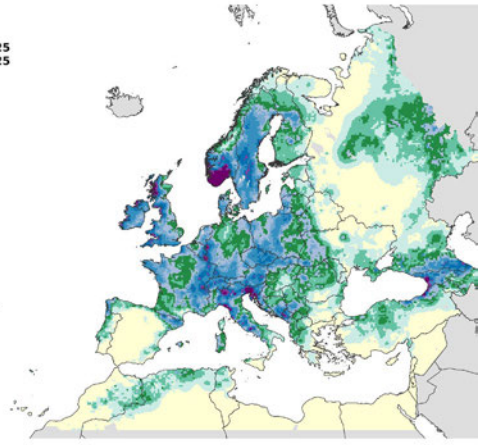


16/09/2025
Resolution: 10 x 10 km

RAINFALL
Cumulative values

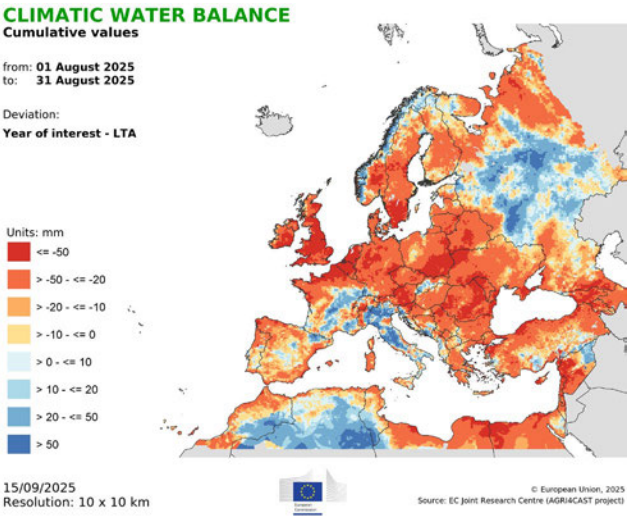
from: **01 September 2025**
to: **13 September 2025**

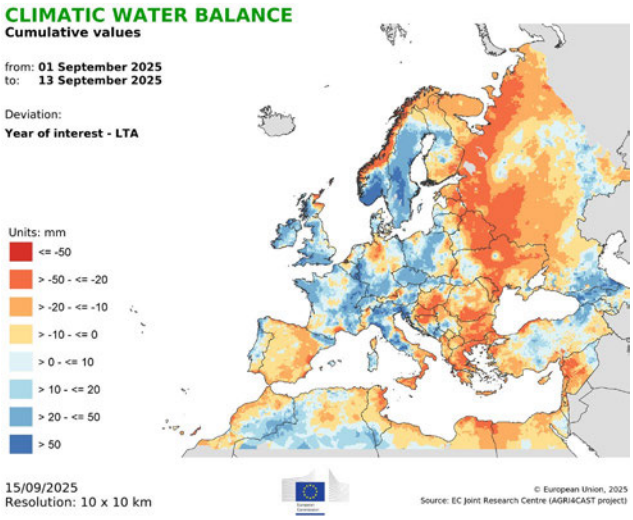
Units: mm
- 0 - 3
- 3 - 10
- 10 - 20
- 20 - 30
- 30 - 40
- 40 - 50
- 50 -70
- 70 - 90
- 90 - 110
- > 110



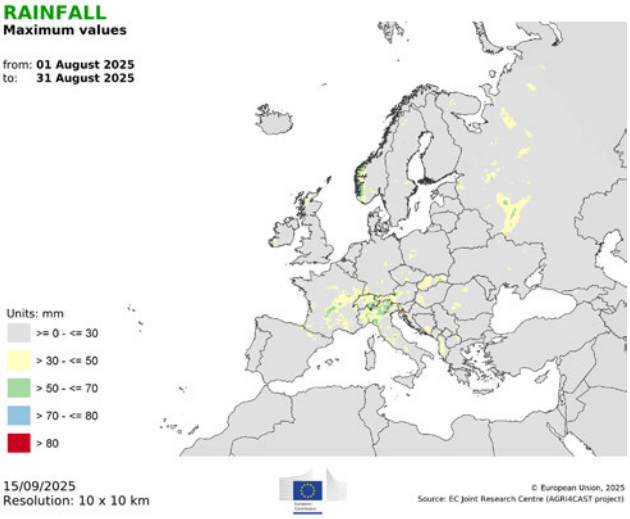
16/09/2025
Resolution: 10 x 10 km

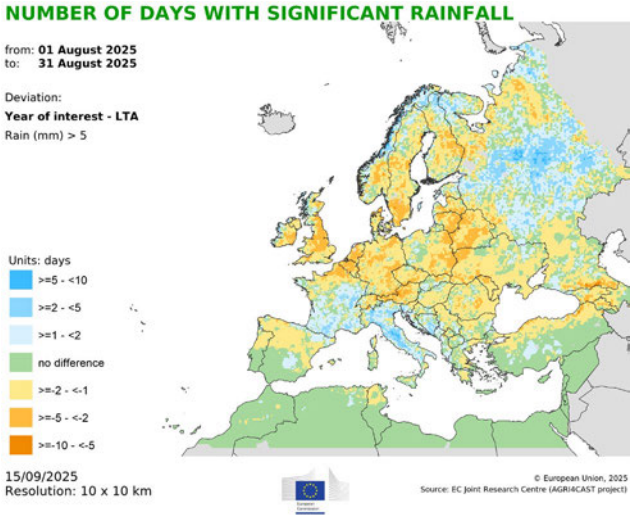
Climatic water balance

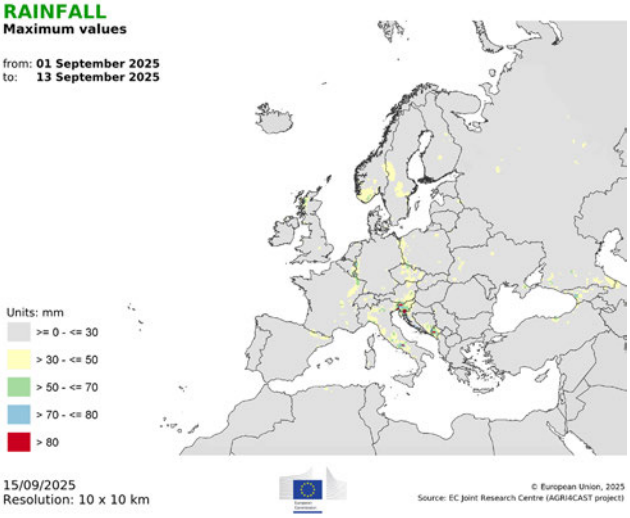


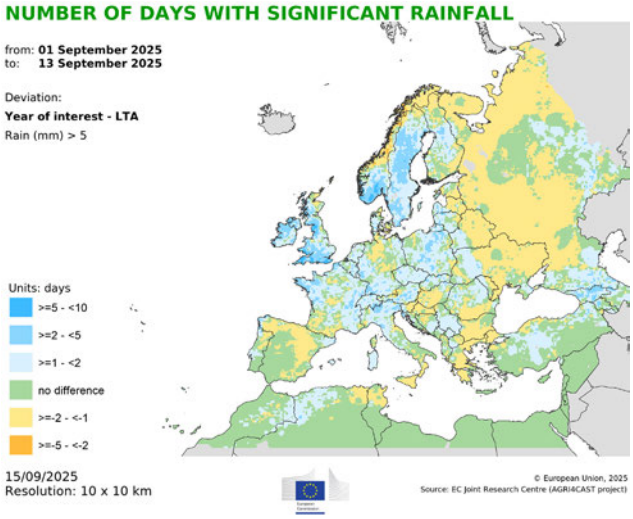


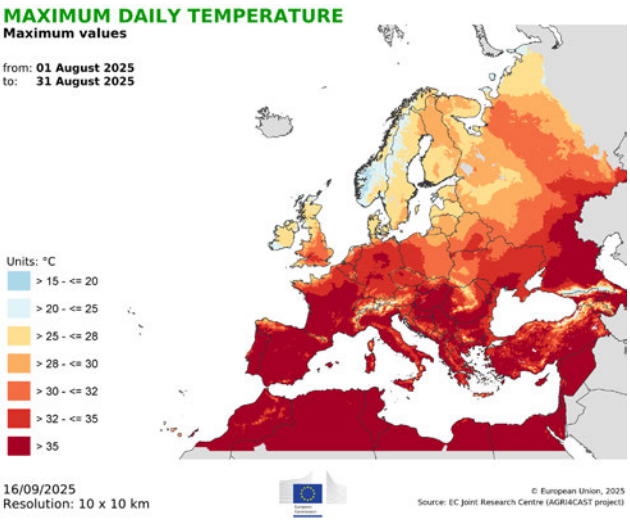
Weather events

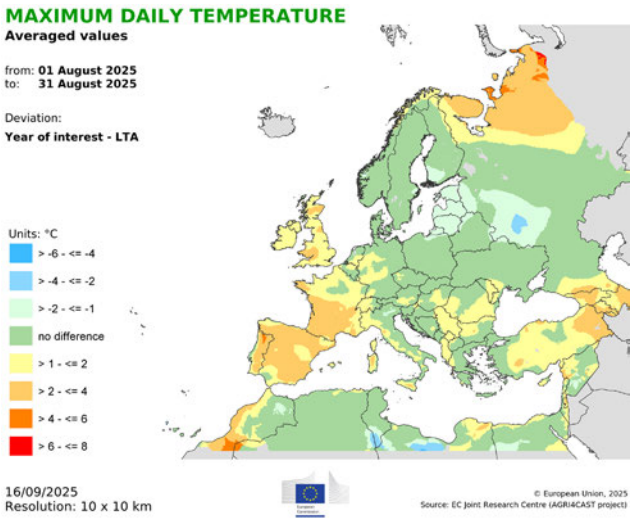


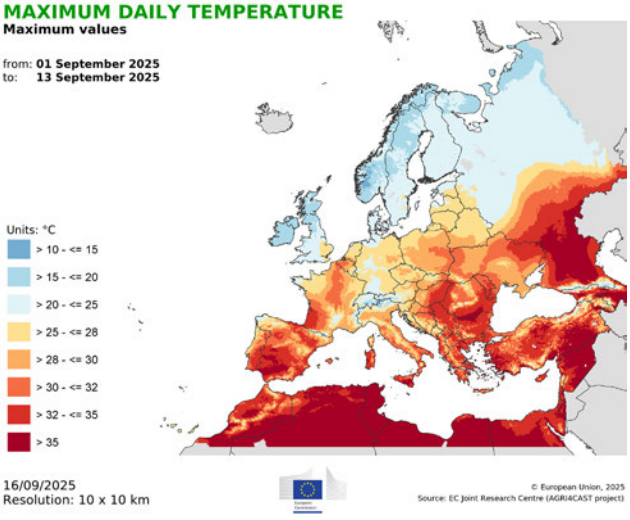


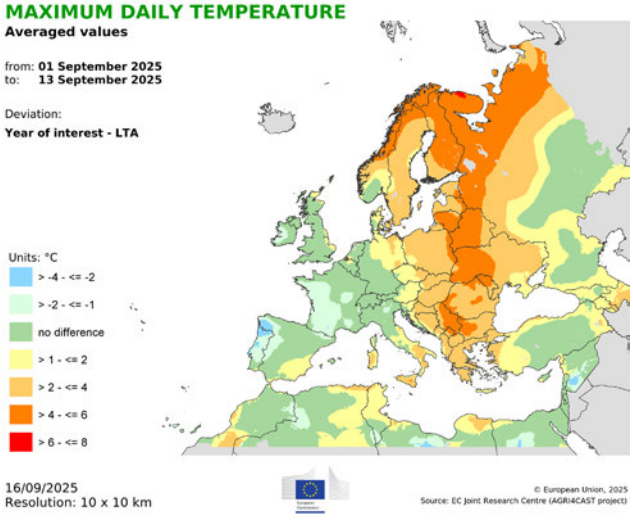


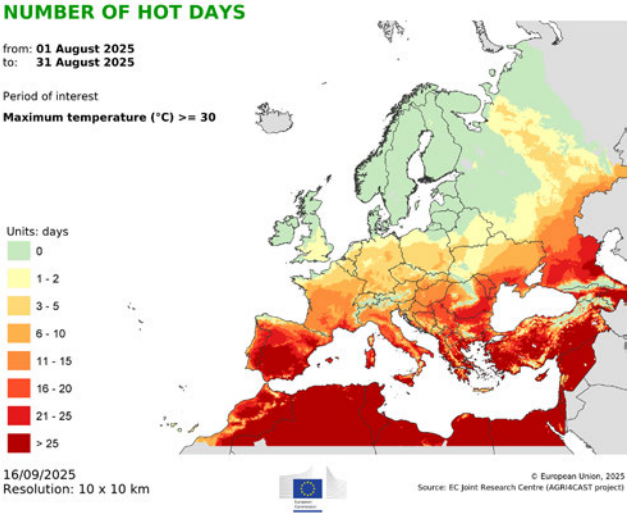


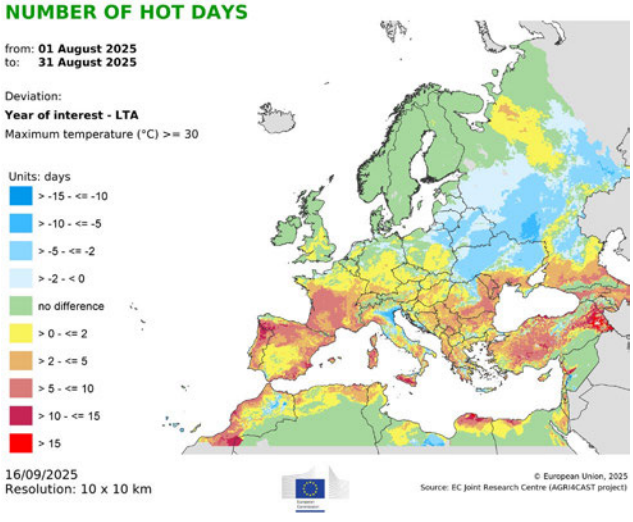

MAXIMUM DAILY TEMPERATURE
Maximum values
from: 01 August 2025
to: 31 August 2025
Units: °C
> 15 - <= 20
> 20 - <= 25
> 25 - <= 28
> 28 - <= 30
> 30 - <= 32
> 32 - <= 35
> 35
16/09/2025
Resolution: 10 x 10 km
© European Union, 2025
Source: EC Joint Research Centre (AGRI4CAST project)

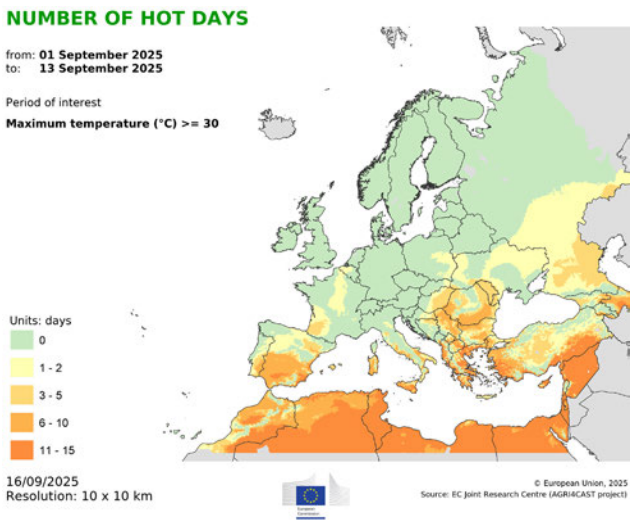

MAXIMUM DAILY TEMPERATURE
Averaged values
from: 01 August 2025
to: 31 August 2025
Deviation:
Year of interest - LTA
Units: °C
> -6 - <= -4
> -4 - <= -2
> -2 - <= -1
no difference
> 1 - <= 2
> 2 - <= 4
> 4 - <= 6
> 6 - <= 8
16/09/2025
Resolution: 10 x 10 km
© European Union, 2025
Source: EC Joint Research Centre (AGRI4CAST project)

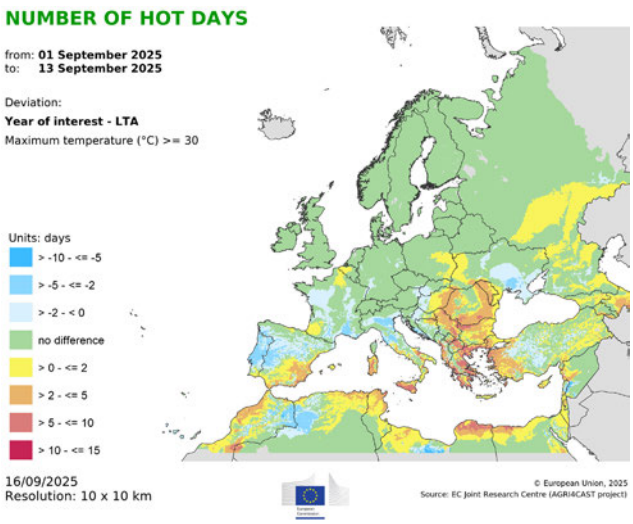

MAXIMUM DAILY TEMPERATURE
Maximum values
from: 01 September 2025
to: 13 September 2025
Units: °C
> 10 - <= 15
> 15 - <= 20
> 20 - <= 25
> 25 - <= 28
> 28 - <= 30
> 30 - <= 32
> 32 - <= 35
> 35
16/09/2025
Resolution: 10 x 10 km
© European Union, 2025
Source: EC Joint Research Centre (AGRI4CAST project)


MAXIMUM DAILY TEMPERATURE
Averaged values
from: 01 September 2025
to: 13 September 2025
Deviation:
Year of interest - LTA
Units: °C
> -4 - <= -2
> -2 - <= -1
no difference
> 1 - <= 2
> 2 - <= 4
> 4 - <= 6
> 6 - <= 8
16/09/2025
Resolution: 10 x 10 km
© European Union, 2025
Source: EC Joint Research Centre (AGRI4CAST project)

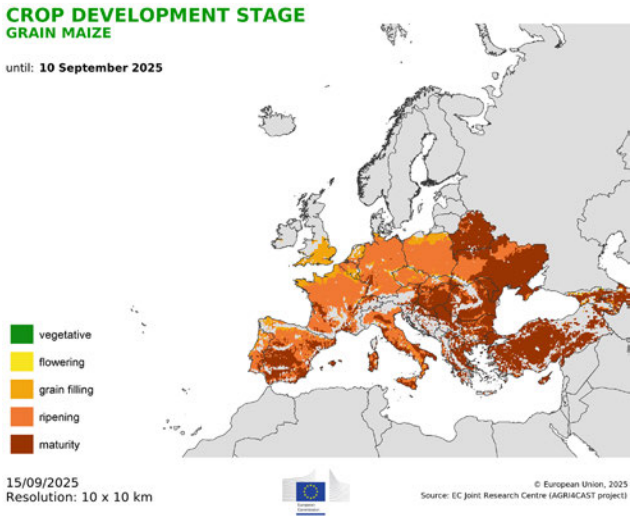

NUMBER OF HOT DAYS
from: 01 August 2025
to: 31 August 2025
Period of interest
Maximum temperature (°C) >= 30
Units: days
0
1 - 2
3 - 5
6 - 10
11 - 15
16 - 20
21 - 25
> 25
16/09/2025
Resolution: 10 x 10 km
© European Union, 2025
Source: EC Joint Research Centre (AGRI4CAST project)

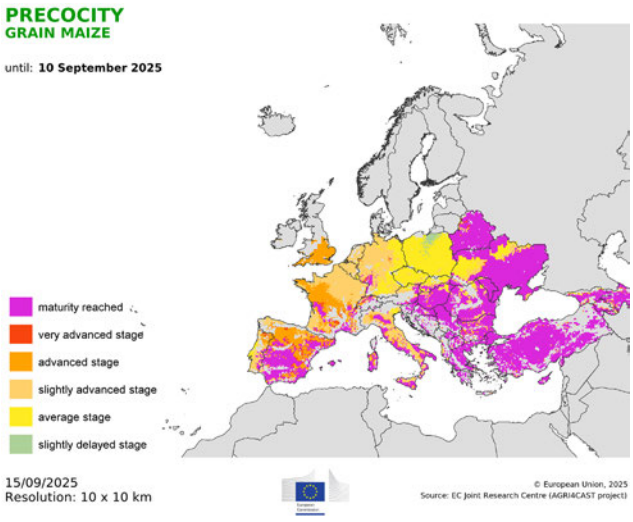

NUMBER OF HOT DAYS
from: 01 August 2025
to: 31 August 2025
Deviation:
Year of interest - LTA
Maximum temperature (°C) >= 30
Units: days
> -15 - <= -10
> -10 - <= -5
> -5 - <= -2
> -2 - < 0
no difference
> 0 - <= 2
> 2 - <= 5
> 5 - <= 10
> 10 - <= 15
> 15
16/09/2025
Resolution: 10 x 10 km
© European Union, 2025
Source: EC Joint Research Centre (AGRI4CAST project)

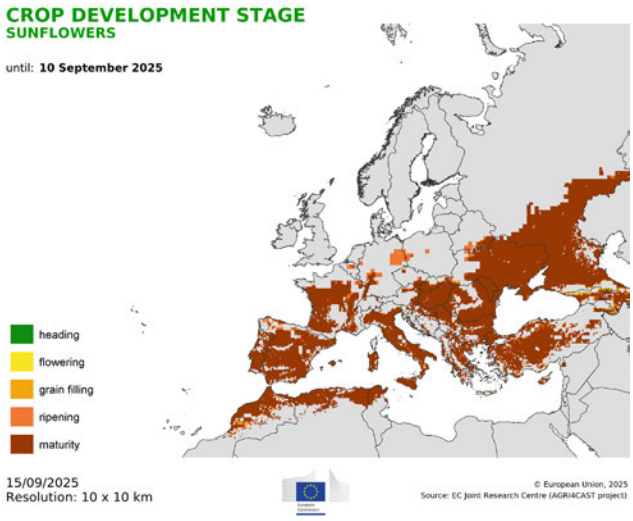


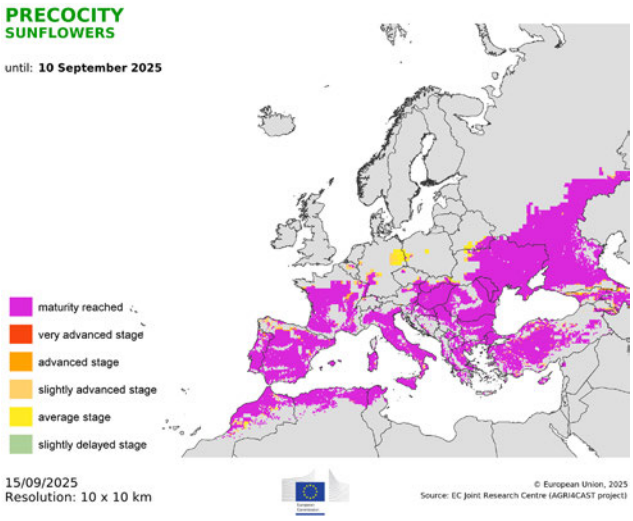


Crop development stages and precocity

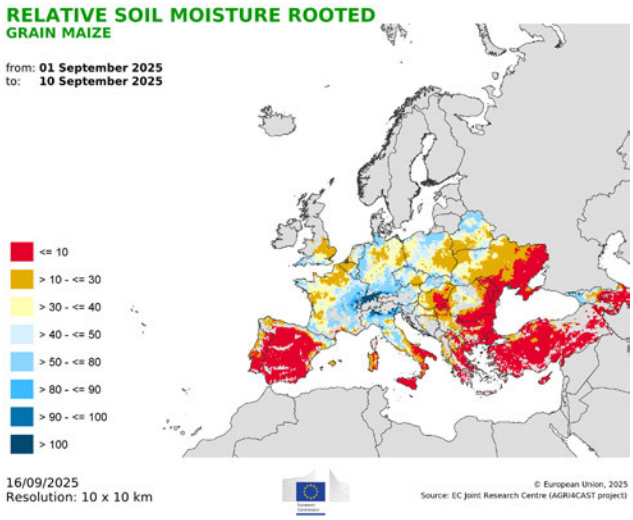


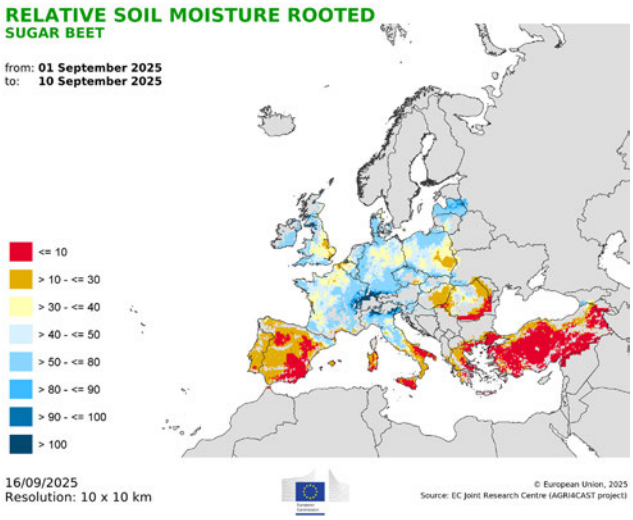




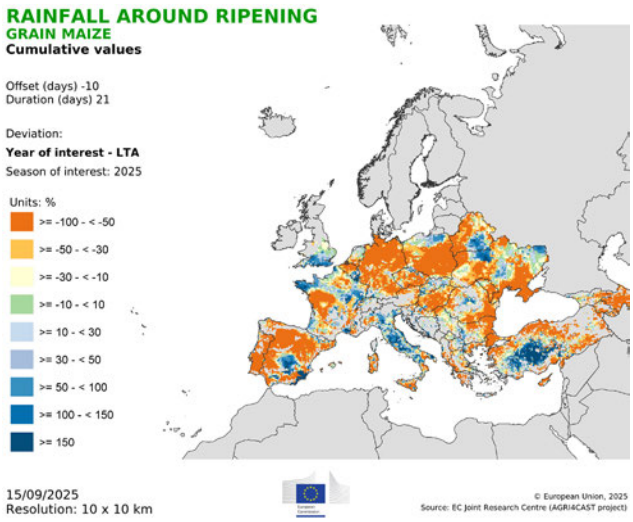


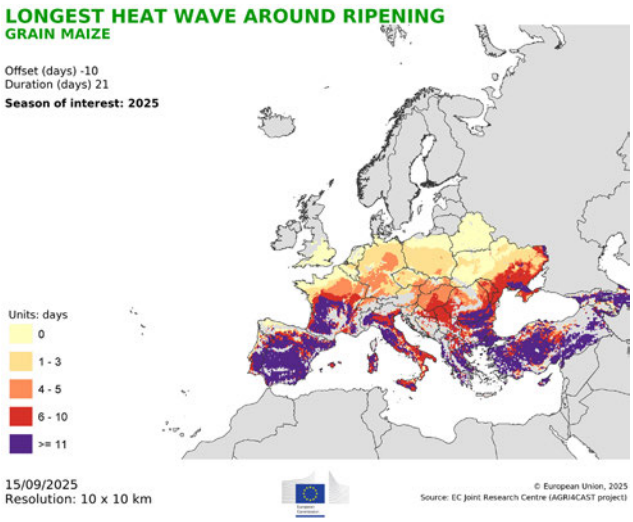
Relative soil moisture

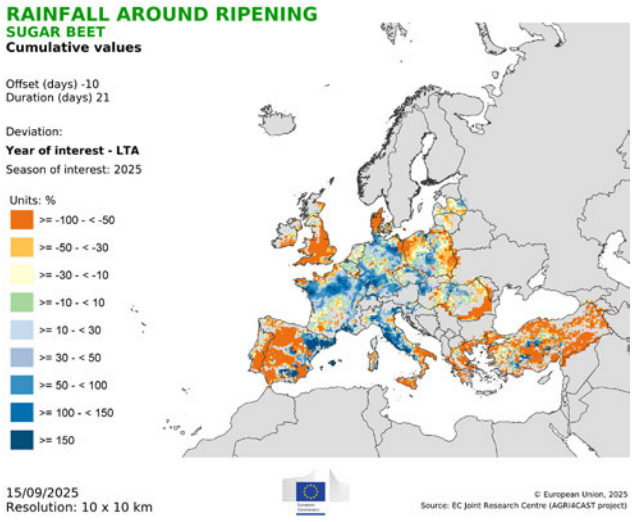


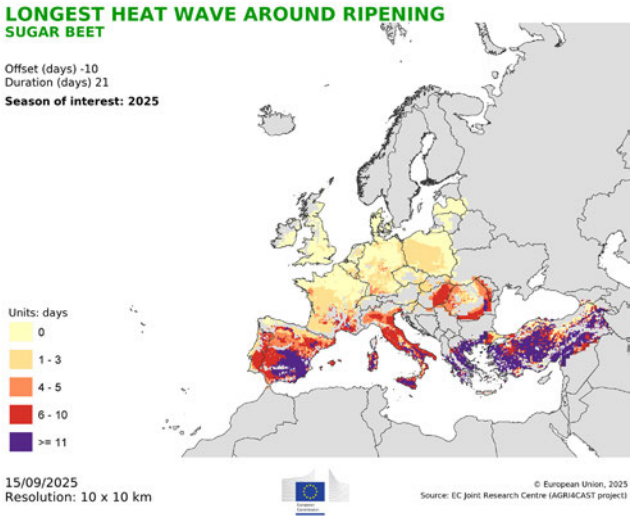


Precipitation and temperature anomalies around ripening

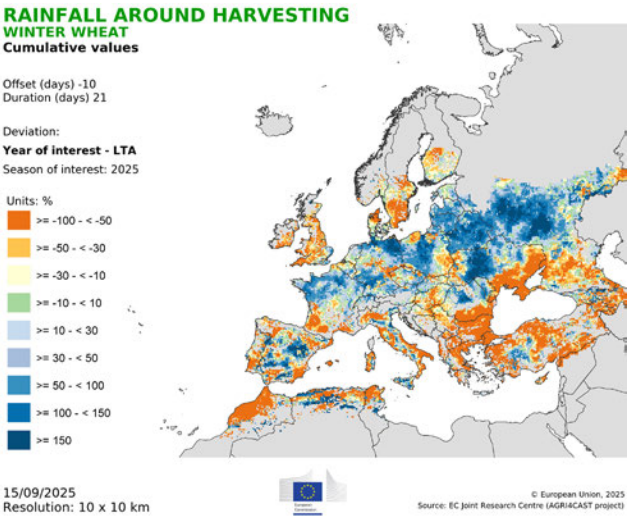


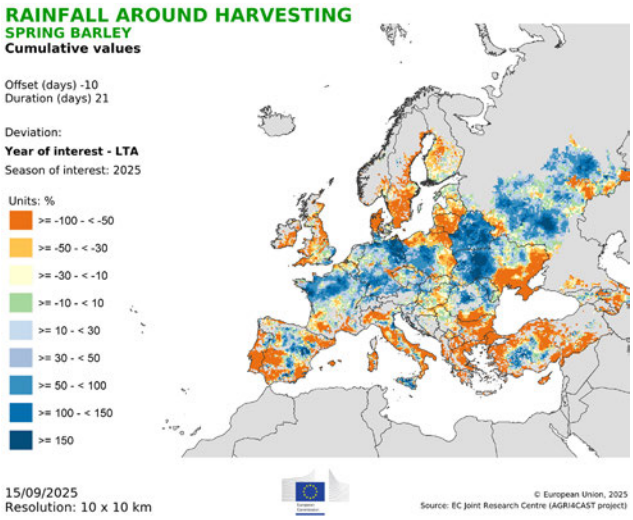






Precipitation around harvesting





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

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