European Commission

Joint Research Centre

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JRC MARS Bulletin

Crop monitoring in Europe – March 2026

Crops exit from winter dormancy in favourable conditions

Locally, limited impacts from frost and waterlogging possible

Winter crops across Europe are gradually restarting their vegetative growth under favourable conditions, supported by adequate soil moisture and mild late-winter temperatures in many regions. However, excessive rainfall in south-western Europe and parts of eastern Europe in February caused temporary waterlogging and local flooding, though impacts on arable crops remain limited so far. Emerging precipitation deficits in north-eastern Europe require monitoring, as crop water demand will be increasing soon.

Winter hardening was generally sufficient, but severe frost episodes in February, particularly in areas with limited snow cover, may have caused local damage in parts of Poland, Ukraine and the Baltic states.

This edition of the bulletin also presents the first quantitative crop yield forecasts for the 2025/2026 cropping season, mostly based on historical trends.

Contents

Covers the period from 1 February until 14 March

Crop	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
Cereals*	5.38	5.82	**5.48**	+ 2	– 6
Total wheat	5.64	6.05	**5.76**	+ 2	– 5
Soft wheat	5.86	6.29	**5.98**	+ 2	– 5
Durum wheat	3.49	3.70	**3.64**	+ 4	– 2
Winter barley	5.11	5.70	**5.13**	± 0	– 10
Rye	4.24	4.65	**4.36**	+ 3	– 6
Triticale	4.41	4.73	**4.51**	+ 2	– 5
Rapeseed	3.20	3.33	**3.22**	+ 1	– 3

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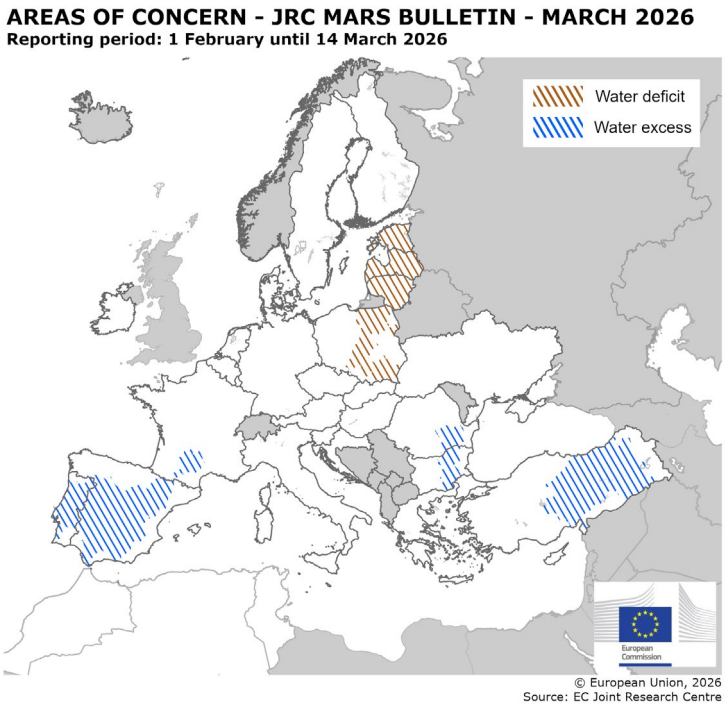
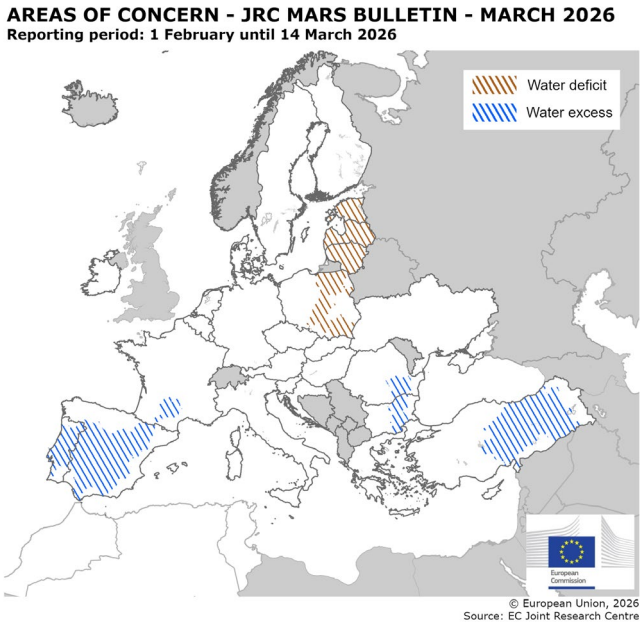
* Only the cereals specified in the table are included



Source: EC Joint Research Centre

1. Areas of concern

Weather conditions during the reporting period have been generally favourable across Europe. The main concerns relate to excess rainfall in south-western Europe and parts of eastern Europe, and emerging precipitation deficits in the north-east.



Excess rainfall caused localised waterlogging and flooding in south-western and eastern Europe

Episodes of abundant rainfall in February and early March led to precipitation totals locally exceeding double the long-term average, resulting in flooding and waterlogging. If drier conditions prevail in the coming weeks, the actual elevated soil moisture levels could prove beneficial for the remainder of the season by reducing the risk of drought and mitigating potential heat stress.

- **Portugal and southern Spain:** Persistent rainfall caused flooding along major rivers, particularly in *Andalucía*, *Extremadura* and central and southern Portugal. Waterlogging and temporarily inundated fields have been reported. These conditions have hampered field operations, but only minor impacts on winter crops are expected.
- **South-western France:** High rainfall totals have led to saturated soils and localised waterlogging, particularly in areas with significant winter cereal production. Impacts on crop state cannot be excluded but have not been confirmed so far.
- **South-eastern Romania and eastern Bulgaria:** Above-average precipitation has resulted regionally in saturated soils and temporary waterlogging. While no adverse effects on crops have been reported, these conditions may limit field accessibility and require monitoring if wet conditions persist.

The recently drier conditions in all three regions are expected to support soil drainage and improve field accessibility.

Emerging precipitation deficit in northern and eastern Europe

Precipitation has remained below average in several regions during the winter period. While soil moisture conditions are still generally adequate, continued dry conditions may become a concern with the resumption of crop growth.

- **Eastern Germany, Poland and the Baltic States:** Below-average rainfall has been observed throughout winter and into early spring. Although current soil moisture levels remain sufficient thanks to limited crop water demand during dormancy, rainfall will be needed in the coming weeks to sustain favourable conditions.

At this stage, no impacts are reported, but the situation requires monitoring as crops exit dormancy and water requirements increase.

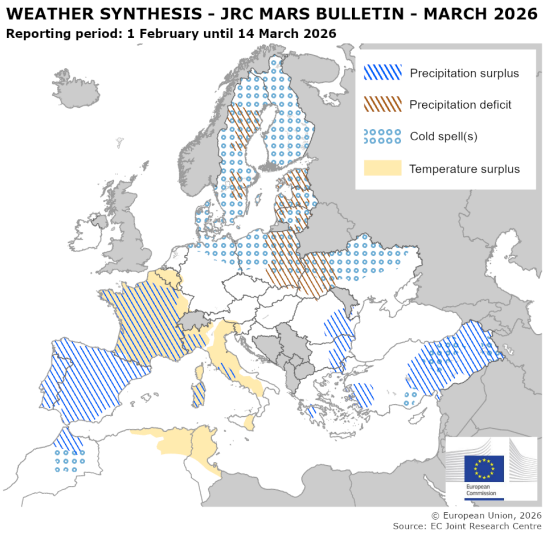
Above-average precipitation in eastern Türkiye

Above-average precipitation has been recorded during the reporting period. While high soil moisture levels could result beneficial for the forthcoming part of the season, the combined effect of wet soils and reduced radiation has had only minor impacts so far, as winter crops have been still in dormancy.

2. Agrometeorological overview

2.1 Meteorological review (1 February – 14 March)

The transitional period from winter to meteorological spring was characterised by contrasting weather patterns, with cold and dry conditions in the north and north-east, and warm and wet conditions in the south and south-west.



The weather synthesis map summarises the most distinct anomalies during the reporting period compared with the 1991–2025 long-term average (LTA) for the same period. Precipitation deficit and surplus are absolute and relative deviations from the LTA. Temperature surplus indicates a substantial deviation in accumulated temperature from the LTA. Cold spells indicate where temperatures were below – 2 °C and below the 10th percentile for a period of five consecutive days.

A temperature surplus occurred in France, Belgium, most of Italy, western Slovenia, and the central Mediterranean islands of *Corse* and *Sardegna*, as well as northern Tunisia and north-eastern Algeria. In these regions, average daily temperatures exceeded the LTA by up to 4 °C, and at least 10 fewer cold days than usual were observed.

A precipitation surplus was observed in eastern Romania and Bulgaria, parts of Greece, most of Türkiye, north-western Italy, France, Spain, Portugal and parts of northern Morocco and Algeria. In most of these regions, cumulative precipitation exceeded the LTA by up to 150 % or more, with up to 15 or more wet days than usual.

Cold spells affected the North European Plain, northern Ukraine, most of Fennoscandia, parts of southern and eastern Türkiye and parts of northern Morocco. In many of these regions, minimum daily temperatures dropped to -20 °C or lower, resulting in up to 5 or even 10 more freezing days than usual.

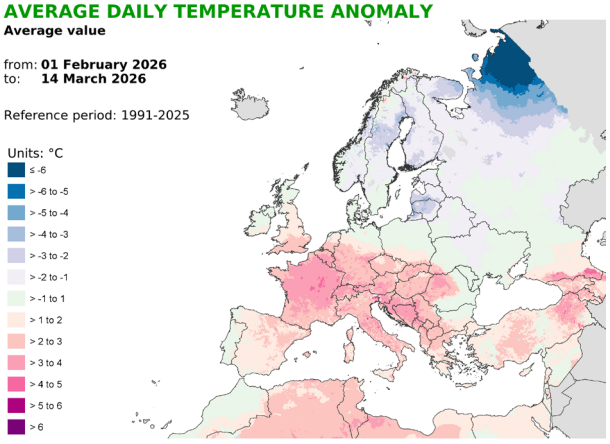
A precipitation deficit was observed in parts of Sweden, the Baltic countries, eastern Poland and western Ukraine, with cumulative precipitation only up to 30 mm, which is below 50 % of the average.

AVERAGE DAILY TEMPERATURE ANOMALY

Average value

from: **01 February 2026**
to: **14 March 2026**

Reference period: 1991-2025

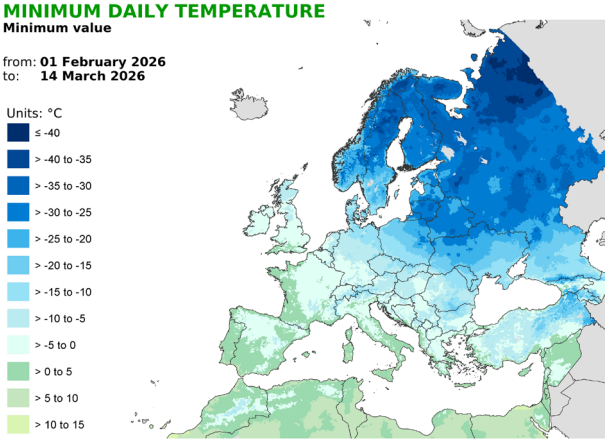


Created: 16.03.2026
Resolution: 10 x 10 km
Data source: based on station data

MINIMUM DAILY TEMPERATURE

Minimum value

from: **01 February 2026**
to: **14 March 2026**



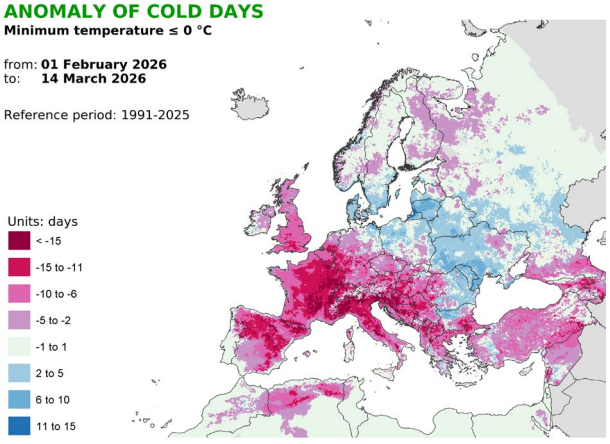
Created: 16.03.2026
Resolution: 10 x 10 km
Data source: based on station data

ANOMALY OF COLD DAYS

Minimum temperature ≤ 0 °C

from: **01 February 2026**
to: **14 March 2026**

Reference period: 1991-2025

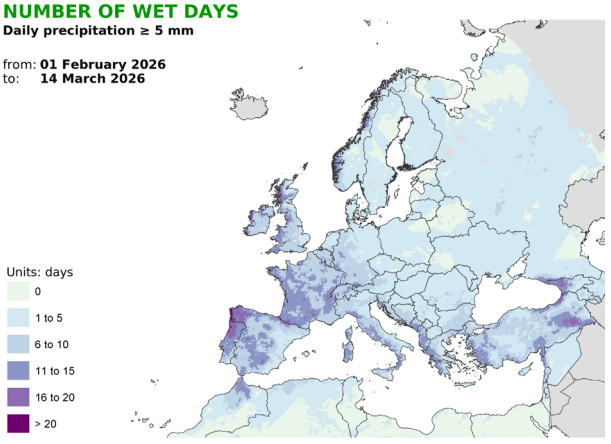


Created: 16.03.2026
Resolution: 10 x 10 km
Data source: based on station data

NUMBER OF WET DAYS

Daily precipitation ≥ 5 mm

from: **01 February 2026**
to: **14 March 2026**



Created: 16.03.2026
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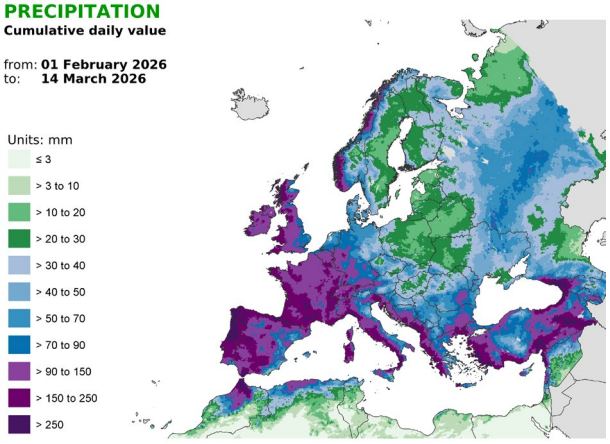
Data source: based on station data

PRECIPITATION

Cumulative daily value

from: **01 February 2026**
to: **14 March 2026**



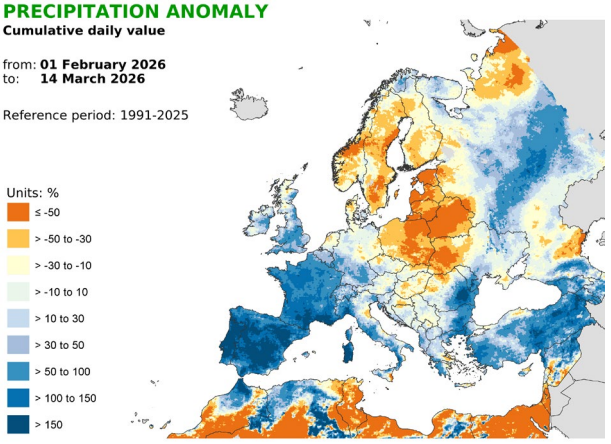
Created: 16.03.2026
Resolution: 10 x 10 km
Data source: based on station data

PRECIPITATION ANOMALY

Cumulative daily value

from: **01 February 2026**
to: **14 March 2026**

Reference period: 1991-2025



Created: 16.03.2026
Resolution: 10 x 10 km
Data source: based on station data

2.2 Weather forecast (19 – 28 March)

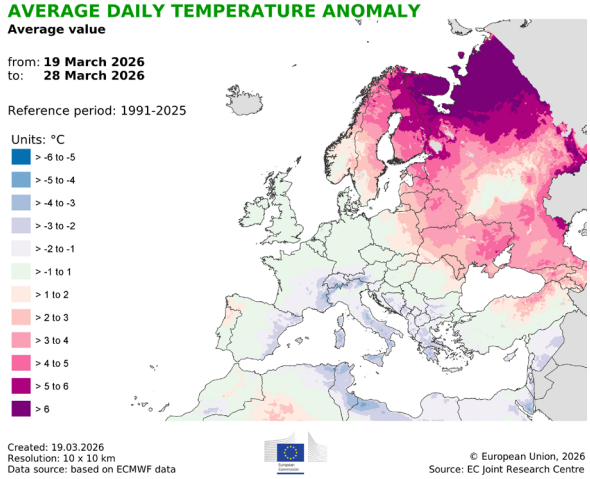
A low-pressure system is expected to bring unsettled weather to parts of central and south-eastern Europe, advecting colder-than-usual air towards the Mediterranean basin. Above-average temperatures are forecast to persist in northern and north-eastern regions.

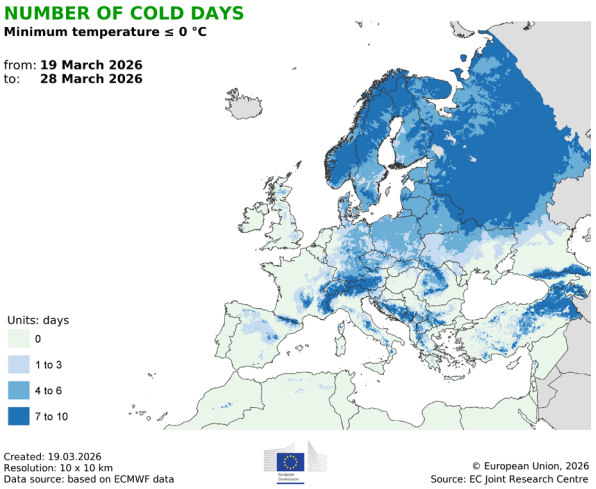
Warmer-than-usual conditions, with average daily temperatures up to 3 °C above the LTA, are forecast in northern and eastern Europe, and in parts of Türkiye. More substantial anomalies (up to 6 °C above the LTA) are forecast in parts of Finland and northern Russia.

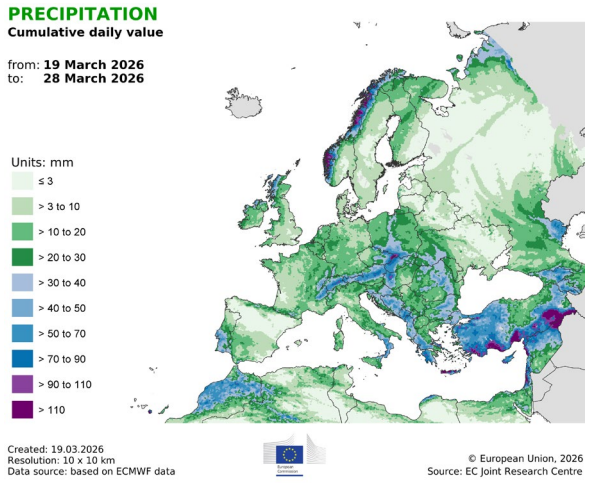
Colder-than-usual conditions (as much as 3 °C below the LTA, and locally more) are forecast for the whole Mediterranean basin, from eastern Spain to the western Balkans, in the Alpine region and in central and eastern North Africa. Freezing night temperatures are forecast across many parts of central and northern Europe for up to six days (more in mountainous areas).

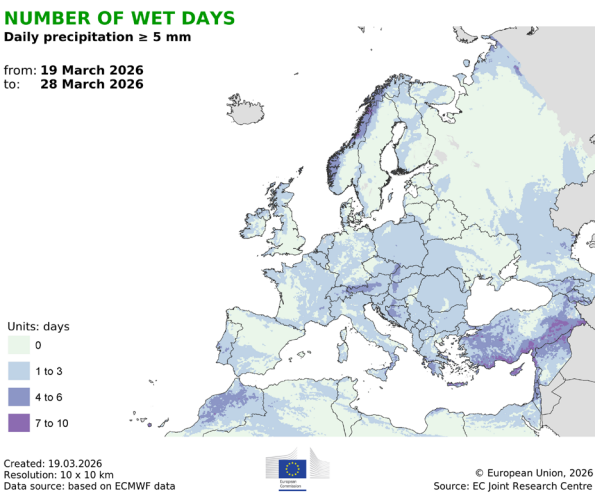
Wet conditions (precipitation of 30–90 mm) are forecast across southern Portugal and Morocco, from the Alps to central Europe and along the Adriatic coast up to the eastern Mediterranean, with **very wet conditions** (precipitation of more than 90 mm, and 7–10 wet days) expected locally in southern Türkiye and central Europe.

The **long-range weather forecast** (April to June) points to a moderate likelihood of slightly warmer-than-average conditions across Europe except in the south-west, exceeding the 24-year climatological median by up to 0.5 °C (1 °C in south-eastern Europe). Albeit with high uncertainty, above-average precipitation is forecast for central-western Europe in April, gradually returning to average in May and June.



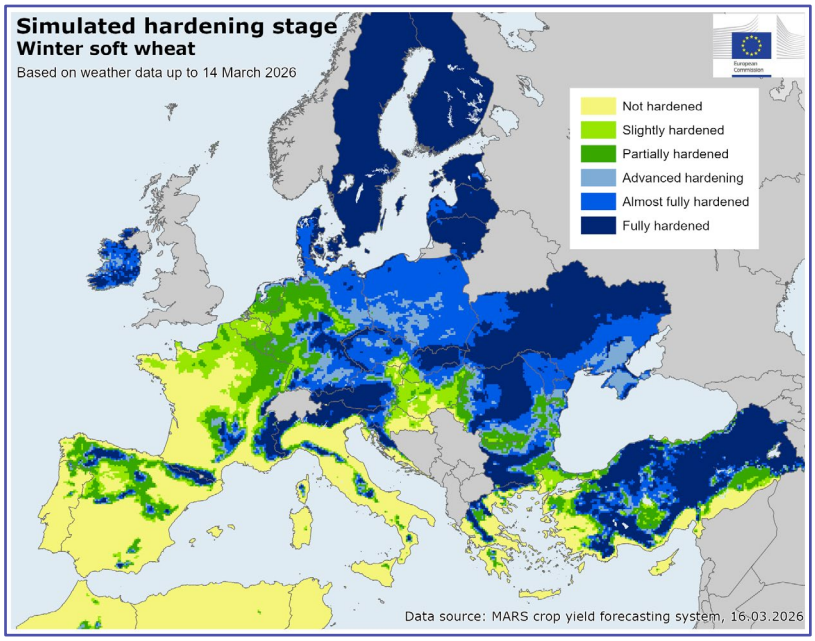






3. Winter hardening and frost kill

De-hardening of winter crops has started in western and southern Europe, but crops still present a high level of frost tolerance in the north and east. Severe frost episodes in the first half of February with limited snow cover probably caused crop damage in Finland, the Baltic countries, eastern Poland and Ukraine.



Hardening is the biophysiological process whereby winter cereals gain low-temperature tolerance to withstand the freezing conditions that occur during the winter dormancy period. Until early March, winter crops were fully hardened in all of northern and eastern Europe and most of western Europe, and the frost tolerance was higher than last year. Long-lasting and exceptionally cold weather was recorded until 20 February in northern and eastern Europe, with minimum air temperatures dropping as low as – 20 °C, and regionally even to – 30 °C, probably exceeding frost tolerance. In particular, areas with thin insulating snow cover in Poland, the Baltic countries and Ukraine suffered from such cold conditions. Our model simulations indicate regional frost kill in winter wheat stands in southern Finland, the Baltic countries, eastern and north-western Poland and in Ukraine. Less frost-tolerant crops such as winter rapeseed and winter barley are likely to have experienced more severe damage. Additionally, minor damage linked mainly to winter rapeseed and winter barley may have occurred in northern Germany, Denmark, Sweden, Czechia, Slovakia, northern Romania and eastern Türkiye, especially where the snowpack was limited.

Since the last dekad of February, temperatures have increased considerably in southern, western and central Europe, where daily maximum temperatures permanently exceeded 10 °C and frequently reached 15–20 °C, triggering the start of de-hardening and slowly ending winter dormancy but increasing crop vulnerability to late cold spells in France, the Benelux countries, western Germany, Croatia, Hungary, Bulgaria and the Mediterranean countries.

In other parts of central, eastern and northern Europe, temperatures have increased to a lesser extent; consequently, winter crops have been able to maintain a high level of low-temperature tolerance, and thus frost protection, so far.

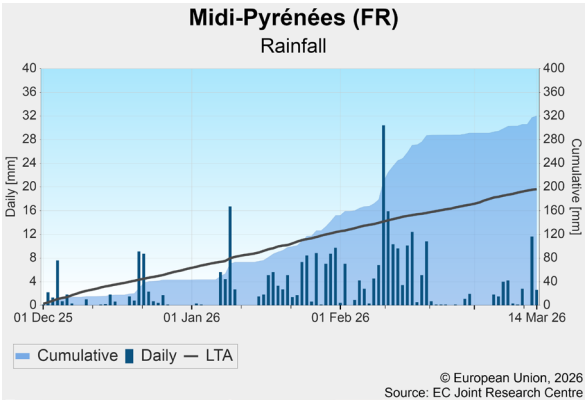
The latest weather forecasts indicate increasing and milder-than-usual temperatures across Europe until the end of March, reducing the risk of frost damage while further decreasing the cold tolerance of winter cereals.

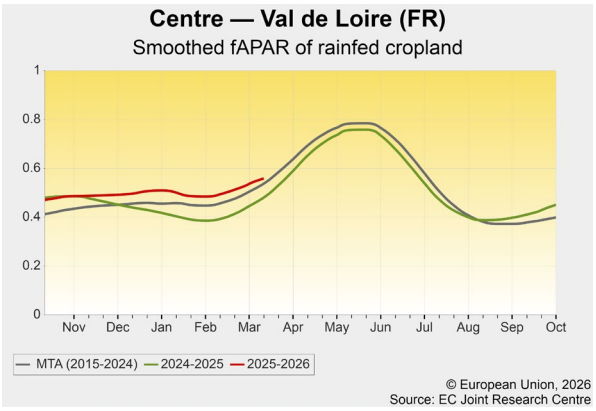
4. Country analysis

4.1 European Union

France - good start of the season despite minor waterlogging risks

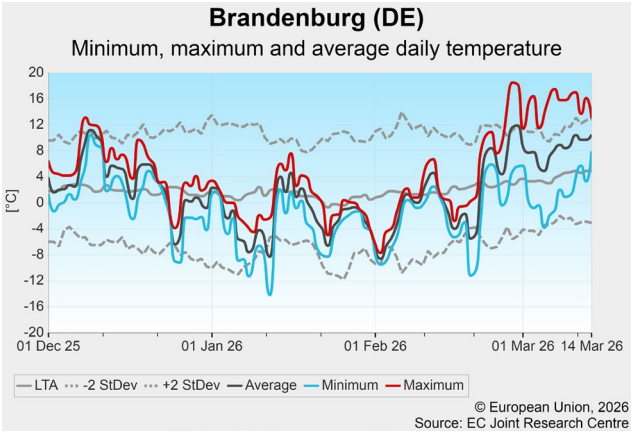
Crops started regrowth under favourable conditions following a wet and mild winter across most regions, with particularly abundant precipitation in February. Mild temperatures, especially since mid February, have supported an advanced start of the winter crop green-up. Soil moisture conditions have been beneficial for winter crops, and soil water reserves are currently high in most areas. However, the persistent wet conditions raise concerns about local soil moisture excess and potential waterlogging, particularly in western regions, which may temporarily hamper field operations and affect crop development. The sown area of soft wheat and rapeseed is reported to have increased compared with last year. The sowing of spring barley is close to completion, although operations were locally delayed due to overly wet soils; mild temperatures have nevertheless supported a rapid catch-up. Despite these constraints, the overall outlook remains positive, with yield forecasts for the main crops remaining around the long-term trend and the five-year average.

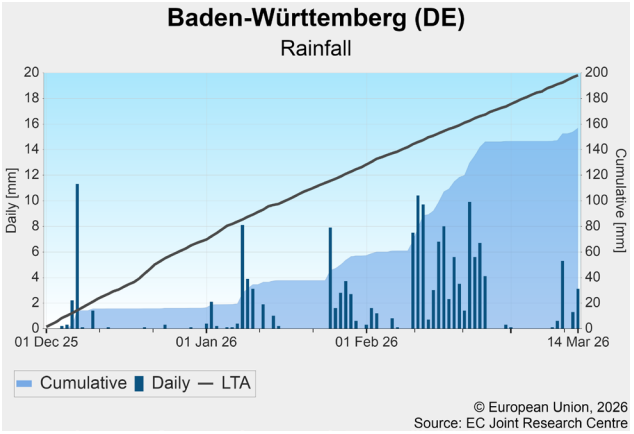




Germany – increasing temperatures end winter crop dormancy

Since December, decreasing temperatures in Germany have generally allowed winter cereals to develop adequate hardening. This enabled overwintering without noteworthy damage, despite recurring cold episodes. An exception is the north-east, where very low temperatures in January probably caused damage locally, mostly in winter rapeseed and especially where fields lacked a consistent snow cover and insulating layer during the coldest periods. Despite a relatively dry winter, especially in the north-east, soil moisture levels have been sufficient so far, but water availability will become an important determinant of early-spring development, as cereals are now exiting dormancy and will resume vegetative growth soon. Increasing temperatures in March have led to the start of the spring crop sowing. Overall, winter cereals have overwintered in good physiological condition and benefited from favourable conditions in early March. Current crop yield forecasts are based on historical trends.

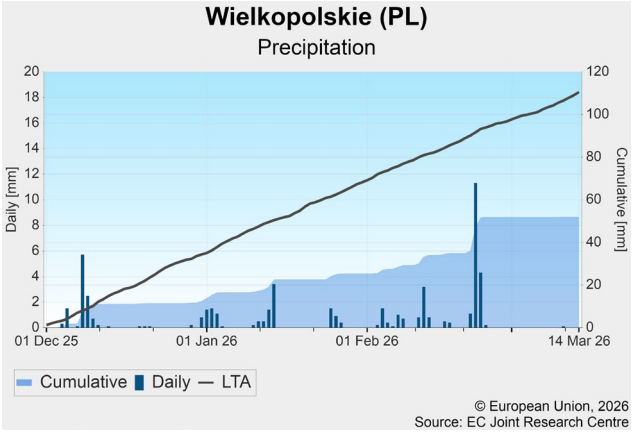


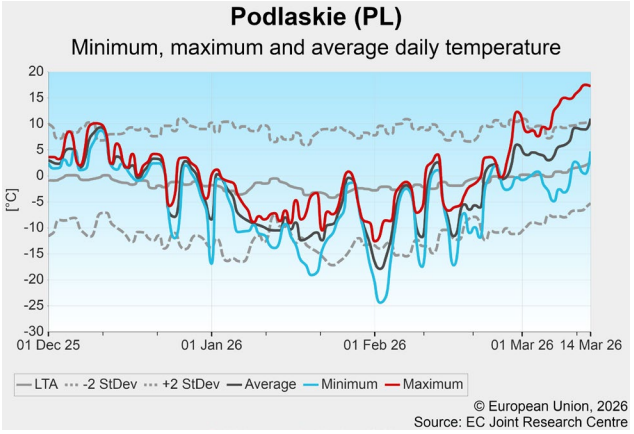


Poland – winter crops in fair condition despite cold and dry winter

Winter crops were adequately hardened during winter, allowing them to withstand repeated cold spells in January and February. However, localised frost damage may have occurred in the north-eastern regions (e.g. *Podlaskie*, *Warminsko-mazurskie*), where temperatures dropped close to or below – 20° C under limited snow cover. This could result in minor area losses, particularly for rapeseed and winter barley. Despite significantly drier-than-usual weather during winter, soil moisture levels remained satisfactory across Poland thanks to the adequate water supply in autumn. However, the absence of rainfall since early March, combined with the gradual restart of vegetative growth due to recently observed mild temperatures, means that rainfall will be needed in the coming weeks to support crop development.

Overall, winter crops are entering spring in fair condition, and our yield forecasts follow the historical trends.

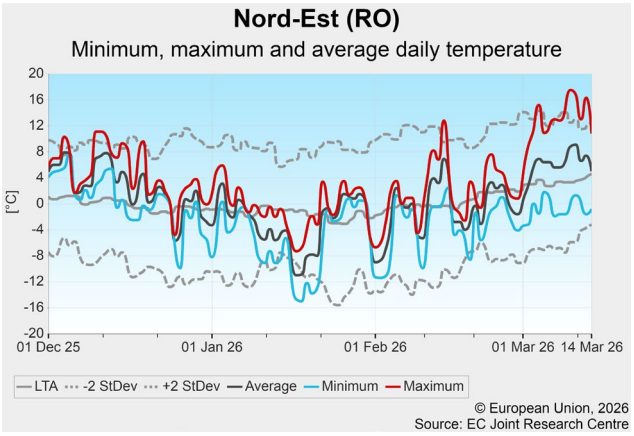


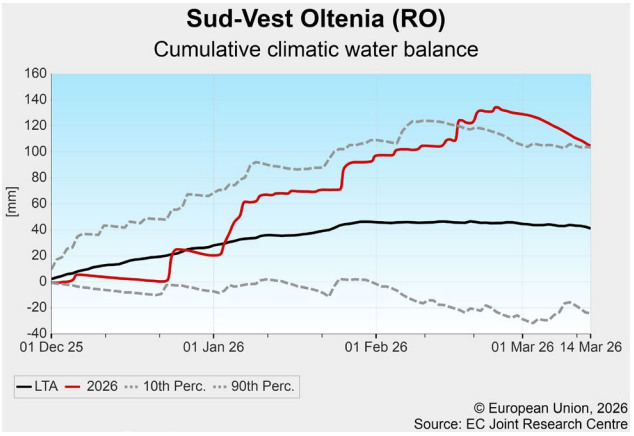


Romania – winter crops in good shape after wintering

After a mild December, temperatures dropped at the end of the year. In mid January and early February, two cold spells occurred with minimum temperatures down to – 15 °C in the south and east, and even down to – 20° C in the north. Snow cover, thanks to abundant precipitation in early January, protected winter wheat stands well, but less frost-tolerant rapeseed and barley may have suffered some damage locally. The rain also increased soil moisture in southern Romania around mid February, while a moderate soil water deficit has developed in the north. Winter crops ended dormancy in early March with increasing temperatures. Satellite-derived indicators show delayed phenology in the south and south-east due to late sowing in autumn, while elsewhere winter crops are promising.

Dry and mild weather enabled the start of the sowing campaign of spring barley, with good progress so far. Our current yield forecasts follow the historical trend.

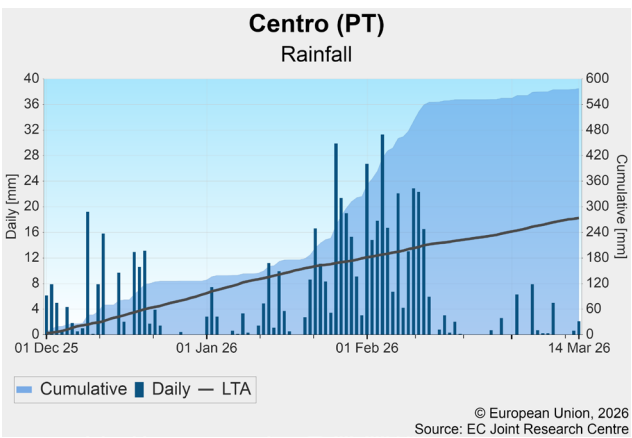


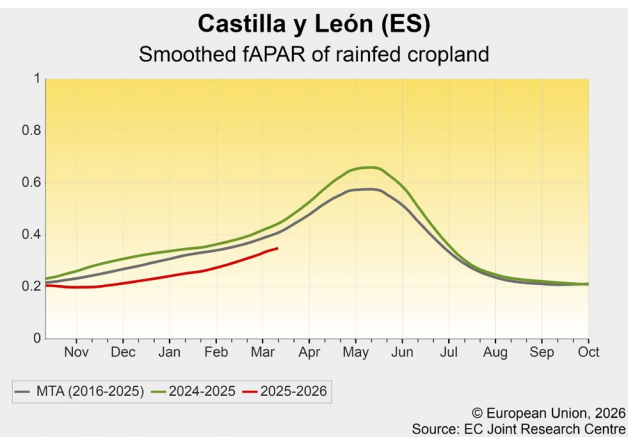


Spain and Portugal – fair winter crop outlook amid local delays and waterlogging

Following a difficult autumn marked by persistent dryness and delayed sowings, the Iberian peninsula generally experienced favourable conditions during winter. Temperatures stayed near seasonal levels, while rainfall was well above average, contributing to improved soil moisture and replenishing water reservoirs required for irrigation in the coming months. However, heavy precipitation in central and southern regions of Portugal (e.g. *Centro*, *Alentejo*) and in south-western Spain (e.g. *Andalucía*, *Extremadura*) caused waterlogging and inundated fields in some places.

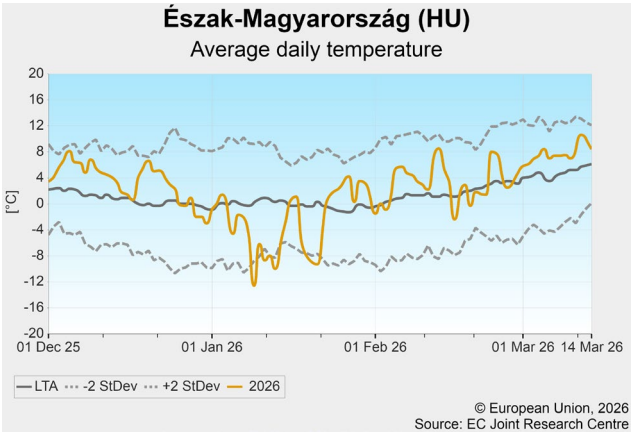
Since mid February, drier-than-usual conditions prevailed in the western parts of the peninsula, enabling gradual drainage of saturated soils, while beneficial rainfall occurred across eastern Spain, supporting the development of winter crops in those areas. Satellite imagery indicates that phenological development remains delayed in northern Spain due to late sowing (e.g. in *Castilla y Leon*), which warrants close monitoring. Overall, winter crops remain in fair condition, and our current yield forecasts are based on historical trends.

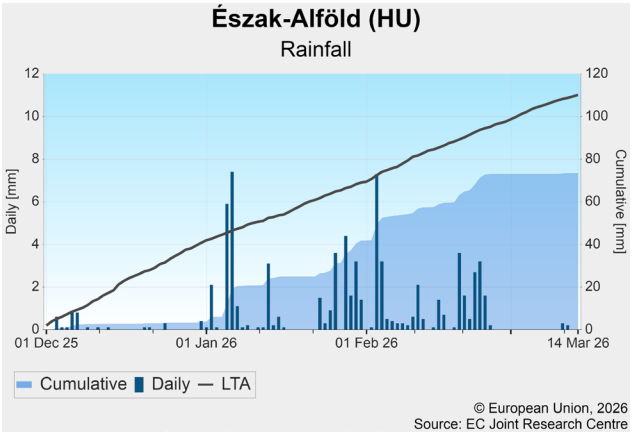




Hungary – winter crops ended dormancy in good condition

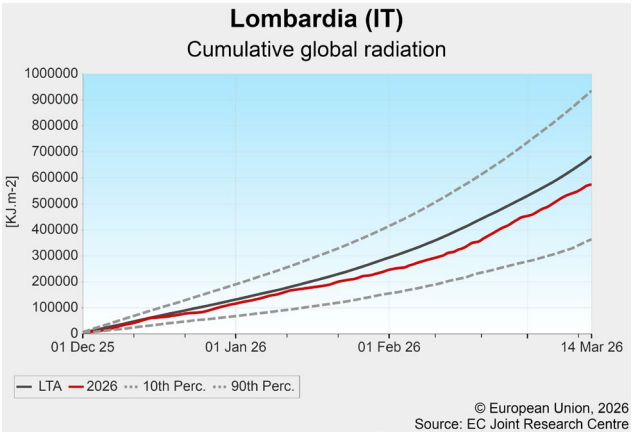
While temperatures in December remained above average, dormancy and hardening were sufficiently achieved by January when a cold spell reached Hungary, particularly in the east. Substantial snowfall provided sufficient cover and protection for the winter crops, so no frost-kill damage is expected. The re-greening of the winter crops started in early March with the arrival of mild temperatures.
Despite the beneficial snowfall, precipitation totals remained below the LTA, only partly replenishing deeper soil layers in the central regions and in the east. While our model simulations indicate advanced phenological development, more rain will be needed to sustain that development. The dry topsoil, however, favours the sowing of spring barley. As the dry autumn hampered the emergence and early development of rapeseed in several places, the re-sowing of weak or gappy fields with summer crops can be expected. Our crop yield forecasts are based on the historical trend.

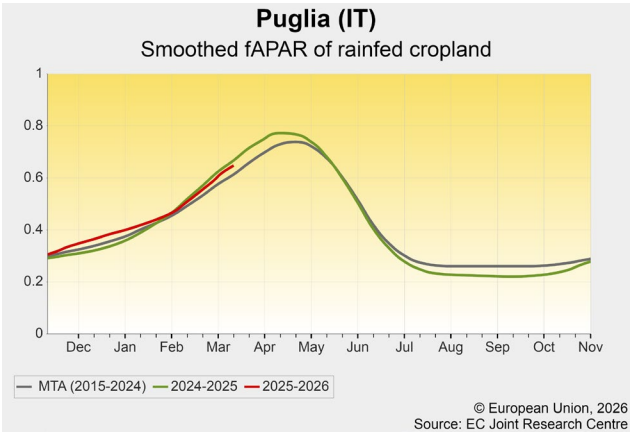




Italy – good crop conditions

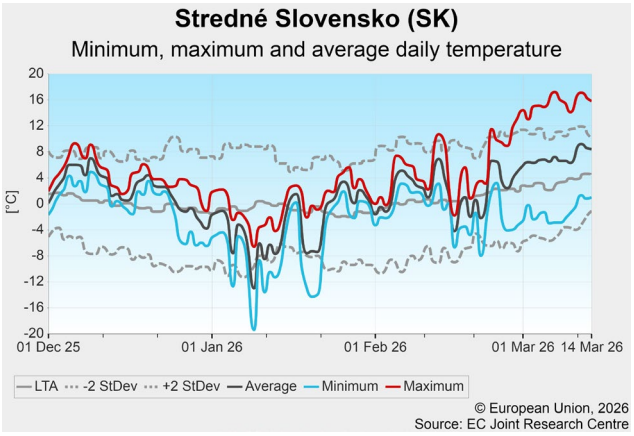
In Italy, the period between 1 December and 31 January was overall milder than usual, with average to abundant precipitation. Crops proceeded well in their early stages in both northern and southern regions. Since February, average temperature anomalies have ranged from + 2 °C to + 4 °C across agricultural regions, with the strongest positive anomalies recorded after 15 February. As a consequence, winter crops developed earlier than usual, especially in the north-west and despite low irradiance levels in February (– 10 % to – 20 %, e.g. in *Lombardia*). In the south, abundant rainfall in the first two weeks of February and again in March replenished the soil water reservoir, providing optimal soil moisture conditions. The favourable water supply was partially counterbalanced by low radiation levels and very intense precipitation, so that winter crops present only slightly advanced stages (e.g. in *Puglia*).
Winter crop yield forecasts, mostly based on the historical trend, are slightly above the five-year average.

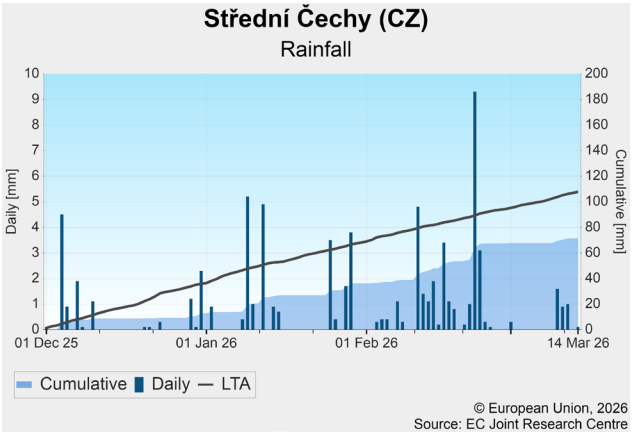




Czechia, Austria and Slovakia – cold spells favour winter hardening

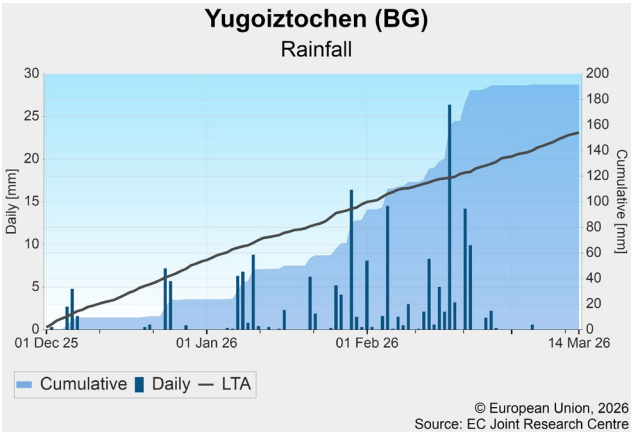
Winter crops had already undergone sufficient vernalisation and reached an advanced stage of winter hardening when minimum daily temperatures briefly plummeted to below – 15 °C in January. Furthermore, snow cover effectively insulated the tillering nodes. Nevertheless, the cold spell in January may have caused damage locally, especially in more vulnerable crops such as rapeseed. Rainfall has been scarce since the end of February and will be a key factor in the coming weeks for winter crop development ahead of the flowering stage, particularly as the weather forecast over the next 10 days shows little additional rainfall. On the other hand, the scarce rainfall in March opened a window of opportunity for the start of the sowing campaign for spring crops. Overall, winter crop conditions are favourable and phenological activity is about to start. Our crop yield forecasts are based on the historical trends.

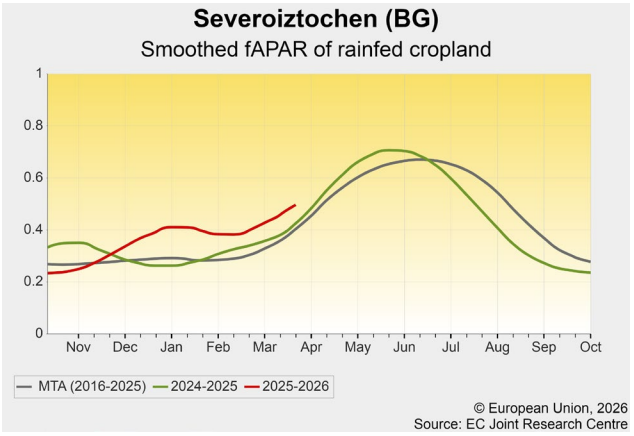




Bulgaria – winter rainfall replenishes soil moisture

In January, two short cold spells occurred in the north (e.g. *Severen Tzentralen*) without damaging crops, thanks to protection from snow cover. Abundant rainfall in autumn had hampered sowing in northern Bulgaria; the delay in crop development has not yet been fully overcome. In the south, sowing progress in autumn was adequate, and winter temperatures predominantly 2–3 °C higher than the LTA allowed winter crops to overwinter in fair conditions.
Since early March, mild temperatures have ended winter crop dormancy and the vegetative growth has restarted. Satellite-based indicators reveal adequate photosynthetic activity of winter crops across the country, except in the north-west, where it is still below average.
Drier-than-usual conditions prevailed in December and January, but the arrival of abundant, locally excessive, precipitation in February replenished the soil moisture content even in the deeper layers, supporting a positive outlook into spring. Our current yield forecasts are based on historical trends.

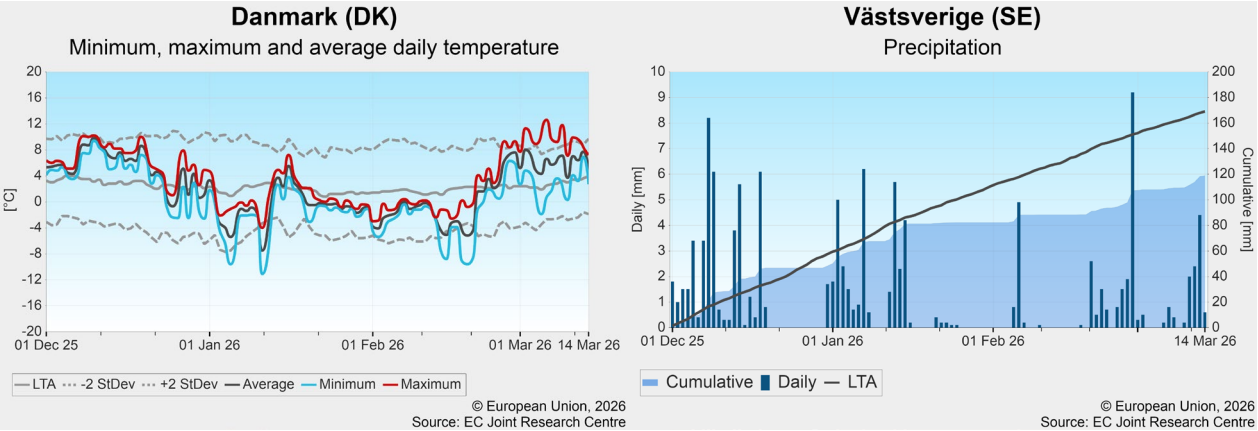




Denmark and Sweden – winter crops about to finish dormancy in fair condition

Winter crops in both countries are about to finish dormancy in fair conditions. The cold spell around mid February is unlikely to have caused significant damage, although minor impacts may have occurred locally where snow cover was insufficient to protect the crops.

While rainfall was close to average in Denmark, only limited precipitation was reported for Sweden during the analysis period; more rain will be needed to restore soil moisture to optimal levels. Our yield predictions are based on historical trends.

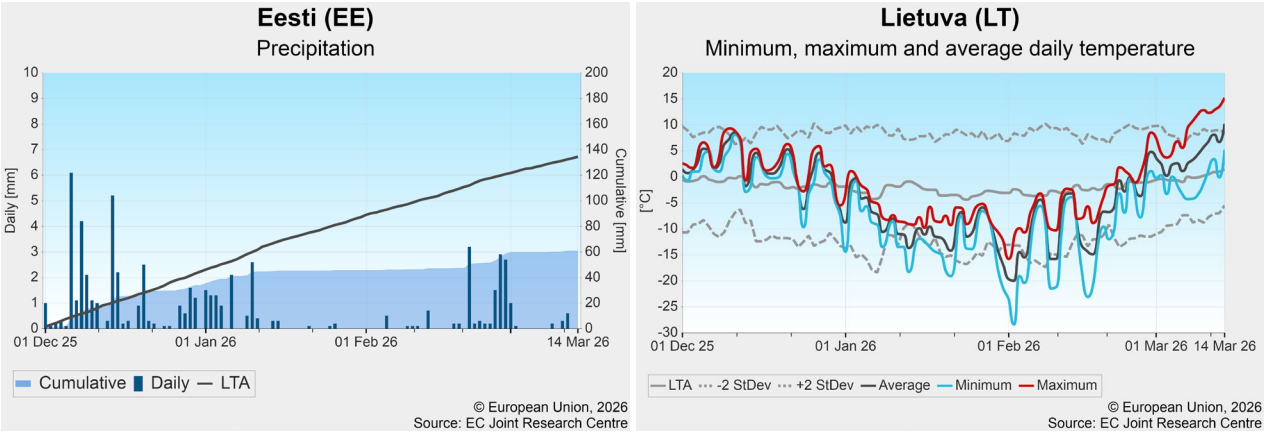


Estonia, Latvia, Lithuania, Finland – severe frost may have affected winter crops

Temperatures were largely below the seasonal average during the first three weeks of February, reaching – 20 °C and below in some regions. This severe cold spell is expected to have affected winter crops, as reported by our models, especially where snow cover was insufficient to effectively protect emerging crops, but the extent and magnitude of the damage remains to be assessed through remote sensing in the coming weeks.

Low rainfall during the cold period has caused a water deficit in the Baltic countries and in southernmost Finland. More rain will be needed to bring soil water back to optimal levels, as field work is about to resume.

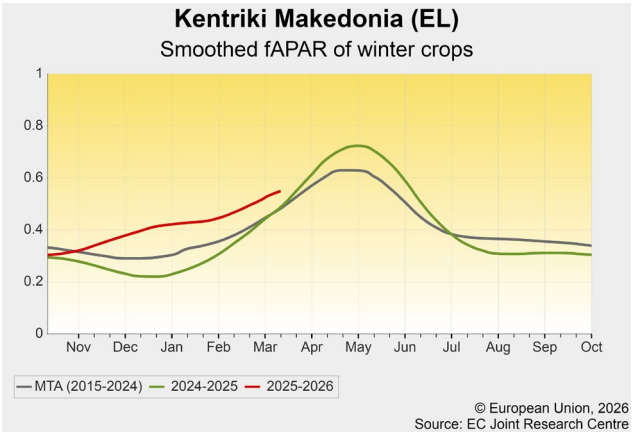
Our yield predictions are based on historical trends.

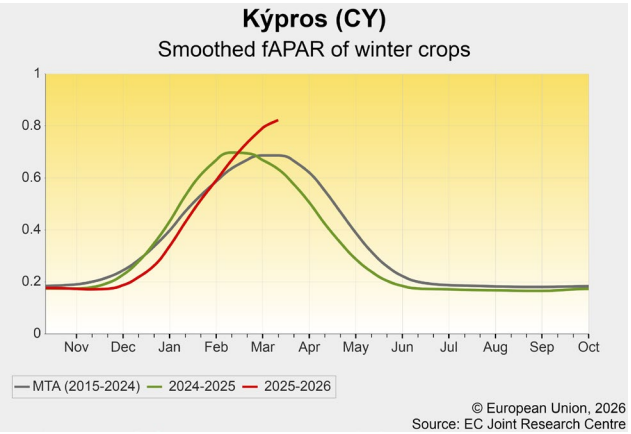


Greece – favourable outlook for winter cereals

Since early December, winter crops in Greece have benefited from mild temperatures and frequent rainfall. These conditions improved soil moisture and supported the vegetative growth of durum wheat, soft wheat, triticale and winter barley. The persistently mild late-winter weather has slightly accelerated crop development in several regions. If these conditions continue, crop phenology may remain somewhat advanced, potentially leading to an earlier-than-usual harvest.

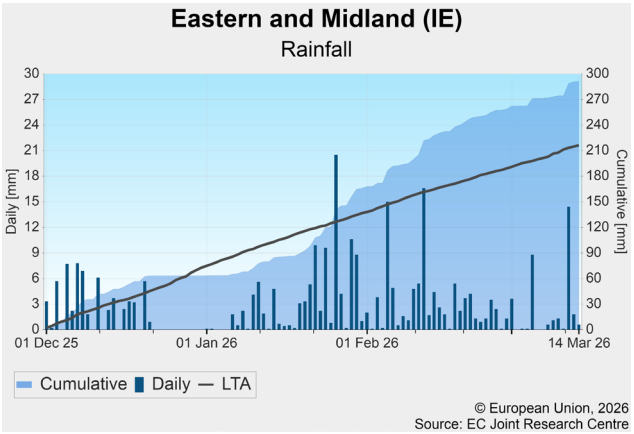
In Cyprus, the delayed sowing of winter barley reported in November due to dry conditions initially slowed crop establishment. However, abundant and well-distributed rainfall from winter to mid March, combined with above-average temperatures, has significantly improved crop growth. Satellite indicators confirm biomass levels well above the medium-term average and crops already at an advanced phenological stage. Overall, the favourable winter weather across both countries supports an above-average yield outlook.

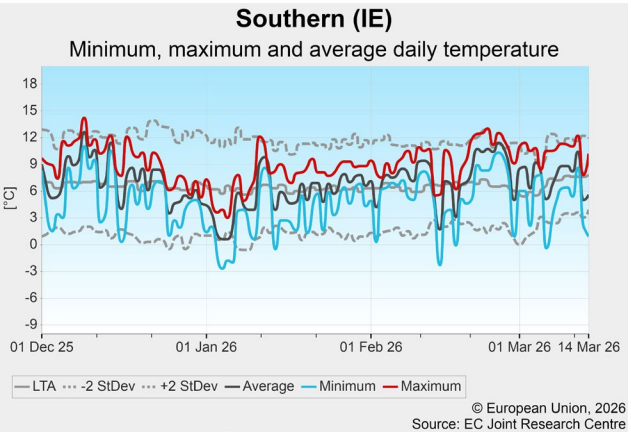




Ireland – winter crops in fair condition despite excessive wetness

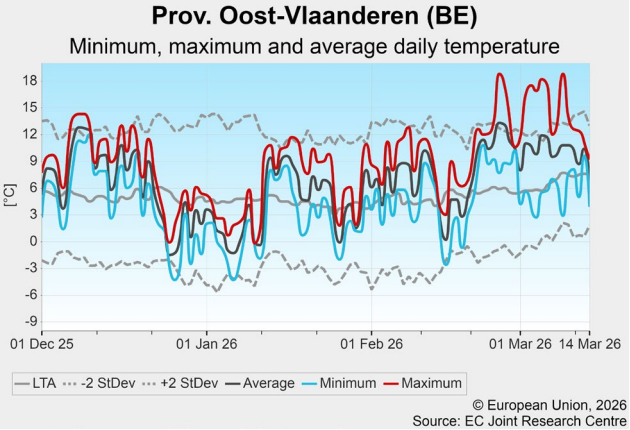
The period from December 2025 to March 2026 was marked by unusually wet and relatively mild weather. Frequent cloudy and rainy conditions, especially during the second half of the winter, kept solar radiation totals below the climatological mean. in the east, and only a brief spell of settled weather in March eventually provided some relief to the saturated soils. Since the end of February, maximum temperatures have been exceeding 10 °C. Overall, winter cereals and rapeseed have come through the winter in fair condition and remain well established. However, the rainy weather delayed field operations across the country while increasing waterlogging in some fields. Field treatments are now overdue but should be favoured by the drier conditions, which are expected to persist over the coming days. Our yield forecasts are based on the historical trend and remain below last year's exceptional levels: slightly below the five-year average for winter cereals and slightly above for rapeseed.

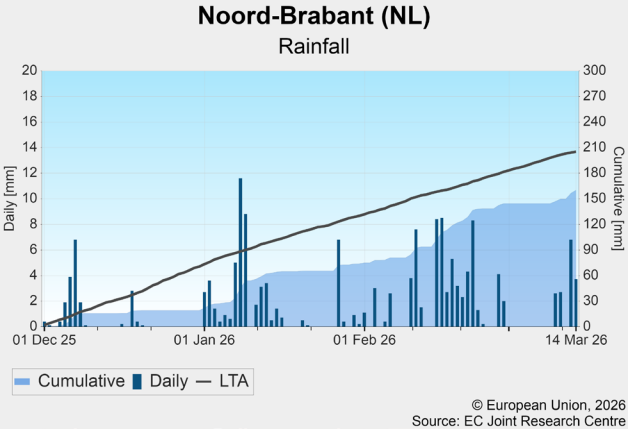




Benelux countries – winter crops in good condition when ending dormancy

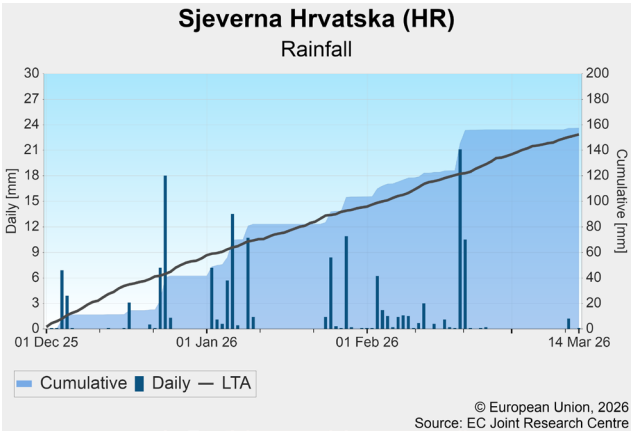
Agrometeorological conditions across the Benelux countries have been favourable for winter crops during winter. Temperatures remained mostly close to the LTA, although two cold spells occurred: a longer episode from late 2025 to early 2026 and a shorter one in mid February. Minimum temperatures locally dropped to around – 10 °C, but no damage to well-hardened winter cereals is expected. After a relatively dry December, rainfall increased in early 2026, replenishing soil moisture to adequate levels as crops approach the end of dormancy. Warmer-than-usual conditions in late February and early March ended winter dormancy. The coming days are expected to remain mostly dry and mild, favouring the vegetative recovery of winter crops and seedbed preparation for and sowing of spring crops. Winter cereals remain in good condition and development is broadly in line with average growth stages. Yield forecasts are based on historical trends.

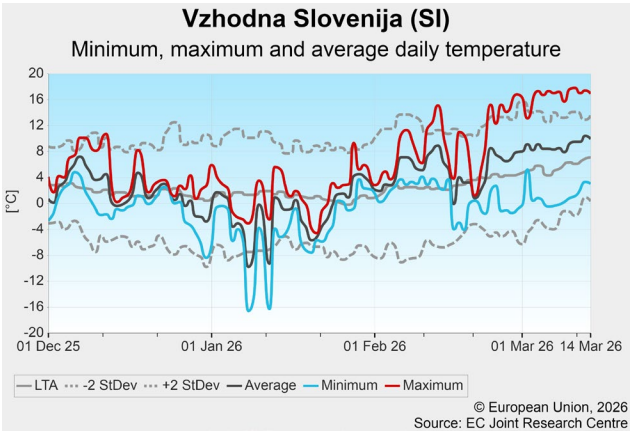




Slovenia and Croatia – positive outlook after a cold January

After a dry start in December, precipitation has aligned with the LTA since January, while remaining slightly below in areas of western Slovenia and central-eastern Croatia. January was the coldest month, with minimum temperatures as low as – 15 °C for a few nights. However, this cold spell was preceded by snowfall, allowing snow cover to protect crops from frost damage. From February onwards, temperatures turned milder, with a further increase in March, bringing cumulative active temperatures to above the average. All winter crops overwintered well and are in very good condition. Fields remained accessible throughout the winter, enabling the regular monitoring of crop development and plant density. The first round of fertiliser applications is currently under way, with no major concerns reported. Yield forecasts, based on historical trends, are above the five-year average for all the winter crops.





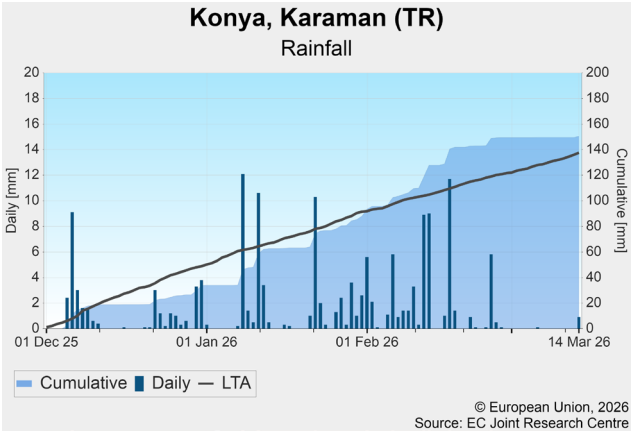
4.2 Black Sea area

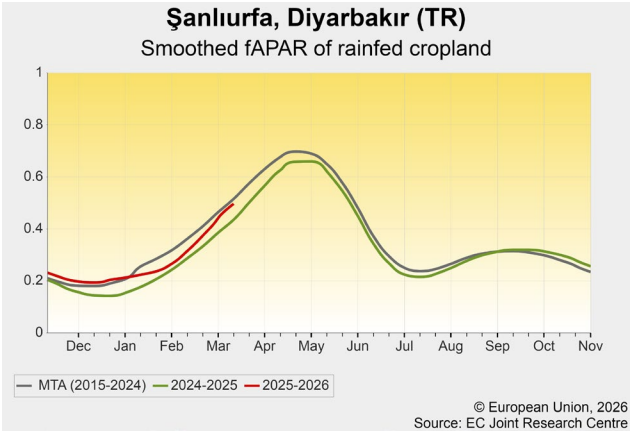
Türkiye – winter rain provides good basis for the season

In Türkiye, December and January were warmer than usual, notably in central and western Anatolia. Precipitation increased from scarce in December to abundant in January and was significantly above average in central, eastern and south-eastern Anatolia. As a consequence, winter crop sowing was first delayed by the continued 2025 drought conditions and then frequently interrupted by rainfall.

From 1 February to 15 February, temperatures were well above the average (up to 6 °C above average) but turned back to slightly below the average in early March. Precipitation remained abundant (e.g. in *Konya*) in February and cloud cover reduced radiation, most notably in central and eastern Anatolia. Winter crops suffered from late sowing and reduced radiation and are still in very early growth stages, except in south-eastern Anatolia (e.g. *Şanlıurfa*). Nevertheless, expectations remain favourable for the forthcoming part of the season thanks to replenished soil moisture levels.

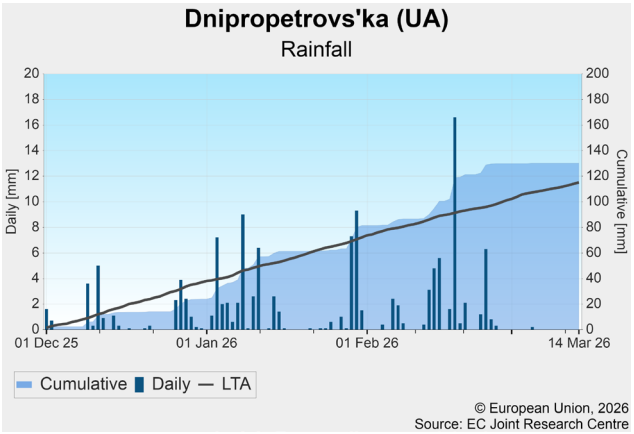
The crop yield forecasts for winter cereals, based on the historical trend, are above the average.

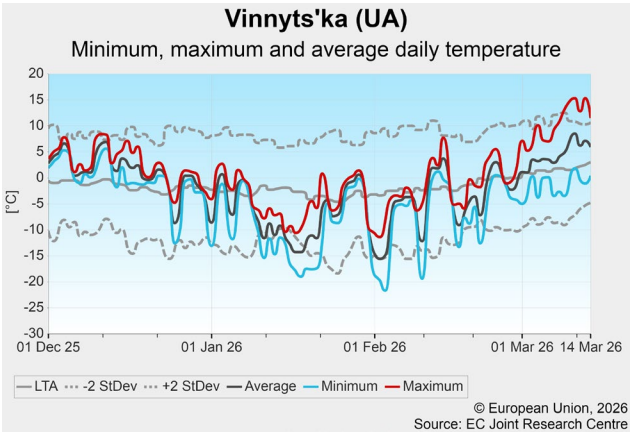




Ukraine – cold winter with uncertain impacts on winter crops

Colder-than-usual conditions prevailed during the winter in Ukraine, with a notable cold spell in early February, when temperatures dropped up to around – 25 °C in the north-west. These extreme temperatures may have caused damage to winter crops, particularly to rapeseed and winter barley. In central areas, unusually low temperatures and a persistent ice crust were reported, which may have affected winter crops, although the extent of damage remains to be confirmed. Precipitation totals were close to the seasonal average, ensuring sufficient snow cover to protect winter crops and providing favourable moisture conditions for the start of regrowth. The spring green-up has not yet started, but the sharp increase in temperatures observed since early March is expected to trigger vegetation regrowth in the coming days. The overall outlook remains uncertain, as the full extent of damage, possibly mitigated by the snow cover, has not yet been assessed. Yield forecasts for wheat and barley are therefore maintained around the long-term trend and the five-year average.



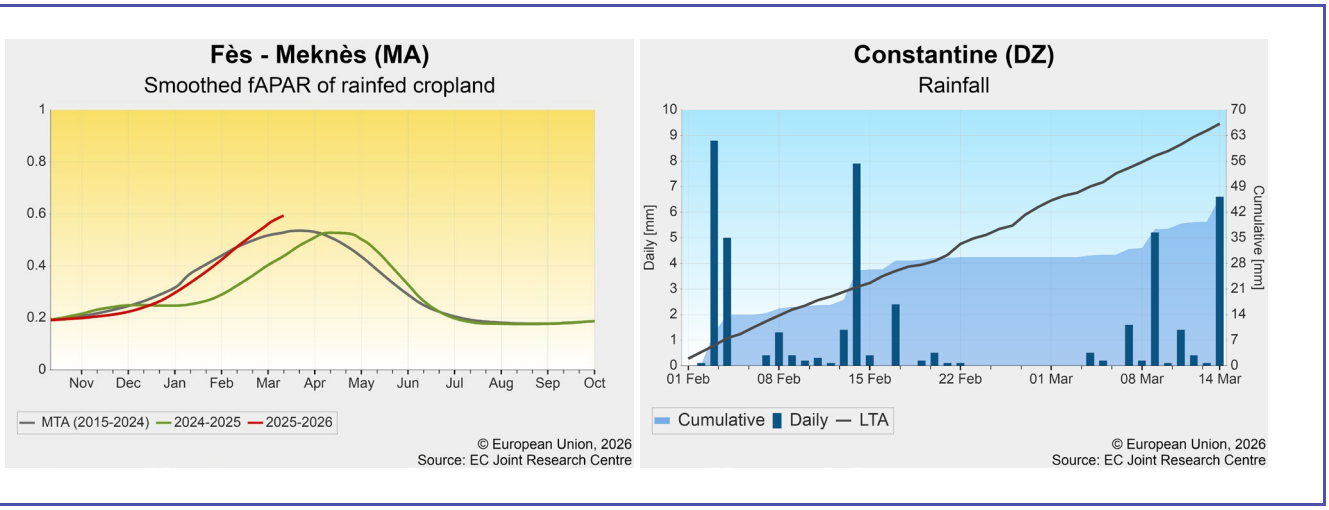


4.3 Maghreb

Morocco, Algeria and Tunisia – excellent crop conditions confirmed by satellite observations

Exceptionally wet conditions have prevailed throughout the season across the western Maghreb, particularly in Morocco and western Algeria (e.g. *Fès*, *Meknès*). During the reporting period, the climatic water balance has remained well above the LTA, fostering record-high above-ground biomass accumulation according to satellite-derived indicators. In contrast, eastern Algeria and Tunisia (e.g. *Constantine*) have experienced slightly below-average rainfall. However, reservoir levels in Algeria and Tunisia were substantially replenished by the heavy precipitation in January, supporting above-average cereal growth in irrigated areas. Overall, crop conditions range from good to exceptional, though some localised areas in the south may exhibit marginally below-average performance.

We maintain our above-average yield forecasts, with further upward revisions for Morocco based on the ongoing favourable conditions.



5. Crop yield forecast

Total wheat

Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
EU	5.64	6.05	**5.76**	+ 2	– 5
AT	5.85	6.21	**5.90**	+ 1	– 5
BE	7.93	7.37	**8.12**	+ 2	+ 10
BG	5.62	5.78	**5.87**	+ 5	+ 2
CY	—	—	**—**	—	—
CZ	6.28	6.61	**6.29**	± 0	– 5
DE	7.45	7.83	**7.64**	+ 3	– 2
DK	7.86	8.73	**8.00**	+ 2	– 8
EE	4.24	4.11	**4.28**	+ 1	+ 4
EL	3.04	2.90	**3.15**	+ 3	+ 8
ES	3.32	4.20	**3.43**	+ 4	– 18
FI	3.62	4.40	**3.79**	+ 5	– 14
FR	6.97	7.34	**7.02**	+ 1	– 4
HR	5.79	5.93	**5.93**	+ 3	± 0
HU	5.44	5.51	**5.55**	+ 2	+ 1
IE	10.1	10.6	**9.72**	– 4	– 9
IT	3.73	3.72	**3.80**	+ 2	+ 2
LT	4.75	4.77	**4.71**	– 1	– 1
LU	5.98	6.75	**5.98**	± 0	– 11
LV	4.49	4.60	**4.52**	+ 1	– 2
MT	—	—	**—**	—	—
NL	8.76	10.2	**8.82**	+ 1	– 14
PL	5.31	5.54	**5.45**	+ 3	– 2
PT	2.20	2.44	**2.29**	+ 4	– 6
RO	4.54	5.64	**4.74**	+ 4	– 16
SE	6.44	7.27	**6.66**	+ 3	– 8
SI	5.74	6.11	**5.70**	– 1	– 7
SK	5.64	6.04	**5.93**	+ 5	– 2

Soft wheat

Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
EU	5.86	6.29	**5.98**	+ 2	– 5
AT	5.90	6.25	**5.96**	+ 1	– 5
BE	7.93	7.37	**8.12**	+ 2	+ 10
BG	5.63	5.81	**5.91**	+ 5	+ 2
CY	—	—	**—**	—	—
CZ	6.28	6.61	**6.29**	± 0	– 5
DE	7.48	7.85	**7.67**	+ 3	– 2
DK	7.86	8.73	**8.00**	+ 2	– 8
EE	4.24	4.11	**4.28**	+ 1	+ 4
EL	3.00	2.94	**3.05**	+ 1	+ 4
ES	3.42	4.34	**3.53**	+ 3	– 19
FI	3.62	4.40	**3.79**	+ 5	– 14
FR	7.05	7.42	**7.09**	+ 1	– 5
HR	5.79	5.93	**5.93**	+ 3	± 0
HU	5.46	5.53	**5.56**	+ 2	+ 1
IE	10.1	10.6	**9.72**	– 4	– 9
IT	5.22	4.91	**5.04**	– 3	+ 3
LT	4.75	4.77	**4.71**	– 1	– 1
LU	5.98	6.75	**5.98**	± 0	– 11
LV	4.49	4.60	**4.52**	+ 1	– 2
MT	—	—	**—**	—	—
NL	8.76	10.2	**8.82**	+ 1	– 14
PL	5.31	5.54	**5.45**	+ 3	– 2
PT	2.20	2.44	**2.29**	+ 4	– 6
RO	4.55	5.65	**4.74**	+ 4	– 16
SE	6.44	7.27	**6.66**	+ 3	– 8
SI	5.74	6.11	**5.70**	– 1	– 7
SK	5.63	6.04	**5.94**	+ 6	– 2

Durum wheat

Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
EU	3.49	3.70	**3.64**	+ 4	– 2
AT	5.36	5.82	**5.30**	– 1	– 9
BE	—	—	**—**	—	—
BG	4.62	4.55	**4.67**	+ 1	+ 3
CY	—	—	**—**	—	—
CZ	—	—	**—**	—	—
DE	5.84	6.50	**5.96**	+ 2	– 8
DK	—	—	**—**	—	—
EE	—	—	**—**	—	—
EL	3.06	2.89	**3.18**	+ 4	+ 10
ES	2.56	3.03	**2.65**	+ 3	– 13
FI	—	—	**—**	—	—
FR	5.43	5.76	**5.67**	+ 5	– 2
HR	—	—	**—**	—	—
HU	5.04	5.22	**5.28**	+ 5	+ 1
IE	—	—	**—**	—	—
IT	3.07	3.19	**3.21**	+ 5	+ 1
LT	—	—	**—**	—	—
LU	—	—	**—**	—	—
LV	—	—	**—**	—	—
MT	—	—	**—**	—	—
NL	—	—	**—**	—	—
PL	—	—	**—**	—	—
PT	—	—	**—**	—	—
RO	3.59	3.25	**3.62**	+ 1	+ 11
SE	—	—	**—**	—	—
SI	—	—	**—**	—	—
SK	5.69	6.03	**5.86**	+ 3	– 3

Winter barley

Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
EU	5.11	5.70	**5.13**	± 0	– 10
AT	6.54	7.03	**6.58**	+ 1	– 6
BE	7.76	7.74	**8.05**	+ 4	+ 4
BG	5.36	5.69	**5.58**	+ 4	– 2
CY	1.75	0.94	**2.12**	+ 21	+ 126
CZ	5.96	6.47	**6.06**	+ 2	– 6
DE	7.35	7.86	**7.53**	+ 2	– 4
DK	6.92	7.75	**7.08**	+ 2	– 9
EE	4.24	4.00	**4.31**	+ 2	+ 8
EL	2.92	2.73	**3.09**	+ 6	+ 13
ES	2.92	3.99	**2.80**	– 4	– 30
FI	—	—	**—**	—	—
FR	6.62	7.03	**6.62**	± 0	– 6
HR	4.93	5.24	**4.98**	+ 1	– 5
HU	5.60	5.89	**5.70**	+ 2	– 3
IE	9.07	10.2	**8.98**	– 1	– 12
IT	4.02	3.92	**4.00**	± 0	+ 2
LT	4.22	4.16	**4.50**	+ 7	+ 8
LU	—	—	**—**	—	—
LV	4.16	4.55	**4.57**	+ 10	+ 1
MT	—	—	**—**	—	—
NL	8.44	9.63	**8.53**	+ 1	– 11
PL	4.91	5.06	**5.09**	+ 4	+ 1
PT	2.73	2.89	**2.86**	+ 5	– 1
RO	4.66	5.63	**4.73**	+ 2	– 16
SE	5.97	7.24	**6.24**	+ 4	– 14
SI	5.10	5.65	**5.28**	+ 4	– 6
SK	5.58	6.19	**5.50**	– 1	– 11

Rye					
Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
EU	4.24	4.65	**4.36**	+ 3	– 6
AT	4.63	5.26	**4.84**	+ 5	– 8
BE	—	—	**—**	—	—
BG	—	—	**—**	—	—
CY	—	—	**—**	—	—
CZ	5.06	5.66	**5.32**	+ 5	– 6
DE	5.23	5.73	**5.34**	+ 2	– 7
DK	6.25	7.10	**6.53**	+ 4	– 8
EE	3.81	3.90	**4.06**	+ 6	+ 4
EL	—	—	**—**	—	—
ES	2.20	2.71	**2.35**	+ 7	– 13
FI	3.52	4.09	**3.88**	+ 10	– 5
FR	4.13	3.96	**4.10**	– 1	+ 3
HR	—	—	**—**	—	—
HU	3.15	3.09	**3.25**	+ 3	+ 5
IE	—	—	**—**	—	—
IT	—	—	**—**	—	—
LT	2.39	2.38	**2.50**	+ 4	+ 5
LU	—	—	**—**	—	—
LV	3.67	4.39	**4.29**	+ 17	– 2
MT	—	—	**—**	—	—
NL	—	—	**—**	—	—
PL	3.56	3.81	**3.66**	+ 3	– 4
PT	0.98	0.98	**1.01**	+ 3	+ 3
RO	2.85	3.30	**2.97**	+ 4	– 10
SE	5.77	6.11	**5.95**	+ 3	– 3
SI	—	—	**—**	—	—
SK	3.50	3.86	**3.85**	+ 10	± 0

Triticale					
Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
EU	4.41	4.73	**4.51**	+ 2	– 5
AT	5.56	6.21	**5.76**	+ 4	– 7
BE	—	—	**—**	—	—
BG	3.25	3.67	**3.31**	+ 2	– 10
CY	—	—	**—**	—	—
CZ	4.92	5.32	**4.96**	+ 1	– 7
DE	5.94	6.35	**6.10**	+ 3	– 4
DK	—	—	**—**	—	—
EE	—	—	**—**	—	—
EL	2.43	2.36	**2.58**	+ 6	+ 9
ES	2.35	3.06	**2.55**	+ 8	– 17
FI	—	—	**—**	—	—
FR	4.94	5.20	**4.92**	± 0	– 5
HR	4.12	4.40	**4.16**	+ 1	– 5
HU	3.98	4.12	**4.29**	+ 8	+ 4
IE	—	—	**—**	—	—
IT	4.52	4.71	**4.53**	± 0	– 4
LT	3.16	3.24	**3.29**	+ 4	+ 2
LU	—	—	**—**	—	—
LV	—	—	**—**	—	—
MT	—	—	**—**	—	—
NL	—	—	**—**	—	—
PL	4.46	4.71	**4.56**	+ 2	– 3
PT	1.35	1.47	**1.36**	+ 1	– 7
RO	3.87	4.96	**4.00**	+ 3	– 19
SE	5.15	5.58	**5.31**	+ 3	– 5
SI	—	—	**—**	—	—
SK	—	—	**—**	—	—

Rapeseed					
Country	last 5yrs avg yield	2025 yield	EU yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
EU	3.20	3.33	**3.22**	+ 1	– 3
AT	3.14	3.27	**3.29**	+ 5	+ 1
BE	—	—	**—**	—	—
BG	2.58	2.73	**2.70**	+ 4	– 1
CY	—	—	**—**	—	—
CZ	3.14	3.06	**3.04**	– 3	– 1
DE	3.60	3.64	**3.68**	+ 2	+ 1
DK	4.12	4.34	**4.29**	+ 4	– 1
EE	2.30	2.73	**2.22**	– 4	– 19
EL	—	—	**—**	—	—
ES	2.16	2.62	**2.29**	+ 6	– 13
FI	1.24	1.08	**1.35**	+ 9	+ 25
FR	3.37	3.67	**3.36**	± 0	– 8
HR	2.70	2.94	**2.88**	+ 7	– 2
HU	2.83	2.90	**2.90**	+ 3	± 0
IE	4.59	4.86	**4.67**	+ 2	– 4
IT	2.78	2.64	**2.80**	+ 1	+ 6
LT	2.71	2.80	**2.74**	+ 1	– 2
LU	—	—	**—**	—	—
LV	2.38	2.37	**2.64**	+ 11	+ 11
MT	—	—	**—**	—	—
NL	—	—	**—**	—	—
PL	3.31	3.30	**3.29**	– 1	± 0
PT	—	—	**—**	—	—
RO	2.81	3.16	**2.76**	– 2	– 13
SE	3.15	3.62	**3.24**	+ 3	– 11
SI	—	—	**—**	—	—
SK	3.21	3.48	**3.19**	– 1	– 8

Total wheat					
Country	last 5yrs avg yield	2025 yield	Yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
DZ	1.50	N/A	**1.80**	+ 20	N/A
MA	1.77	N/A	**2.27**	+ 28	N/A
TN	2.01	N/A	**2.29**	+ 14	N/A
TR	2.97	N/A	**3.12**	+ 5	N/A
UA	4.32	4.24	**4.50**	+ 4	+ 6

Total barley					
Country	last 5yrs avg yield	2025 yield	Yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
DZ	1.12	N/A	**1.50**	+ 34	N/A
MA	1.20	N/A	**1.60**	+ 33	N/A
TN	1.20	N/A	**1.50**	+ 25	N/A
TR	2.45	N/A	**2.67**	+ 9	N/A
UA	3.61	3.66	**3.70**	+ 3	+ 1

Soft wheat					
Country	last 5yrs avg yield	2025 yield	Yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
DZ	1.36	N/A	**1.55**	+ 14	N/A
MA	1.87	N/A	**2.30**	+ 23	N/A
TN	1.87	N/A	**2.00**	+ 7	N/A
TR	2.93	N/A	**3.08**	+ 5	N/A
	4.32	4.24	**4.50**	+ 4	+ 6

Durum wheat					
Country	last 5yrs avg yield	2025 yield	Yield forecasts for 2026 [t/ha]		
			latest forecast	% diff 5yrs avg	% diff 2025
DZ	1.53	N/A	**1.85**	+ 21	N/A
MA	1.60	N/A	**2.20**	+ 38	N/A
TN	2.02	N/A	**2.30**	+ 14	N/A
TR	3.16	N/A	**3.32**	+ 5	N/A
	—	—	**—**	—	—

NB: Yields are forecast for crops with more than 10 000 ha.

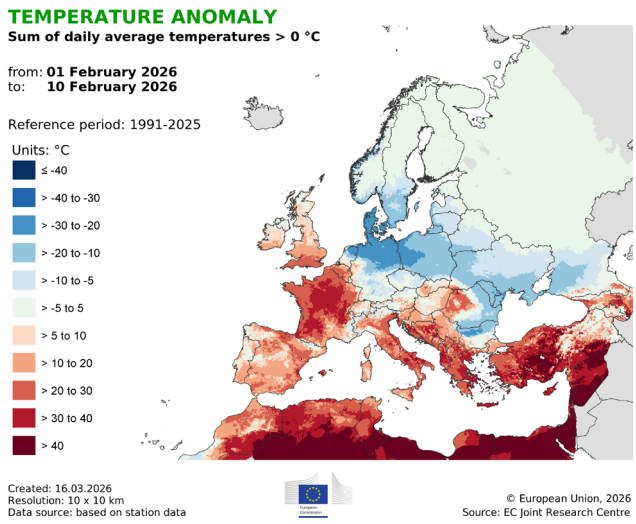
Sources: 2021-2025 data come from DG Agriculture and Rural Development short-term-outlook data (dated February 2026), Eurostat Eurobase (last update: 09.03.2026), ELSTAT, DESTATIS and Statistics Netherlands (CBS).
Non-EU 2021-2025 data come from USDA, MED-Amin baseline db, ONICL Maroc, Ministère de l'Agriculture, de la Pêche Maritime du Développement Rural et des Eaux et Forêts du Maroc, Turkish Statistical Institute (TurkStat), Eurostat Eurobase (last update: 09.03.2026), Ministry for Development of Economy, Trade and Agriculture of Ukraine, sowing/harvest reports from the Ukrainian MAPF and PSD-online.
N/A = Data not available.
The column header '% diff 5yrs avg' stands for the 2026 change with respect to the 5-year average(%). Similarly, '% diff 2025' stands for the 2026 change with respect to 2025(%).

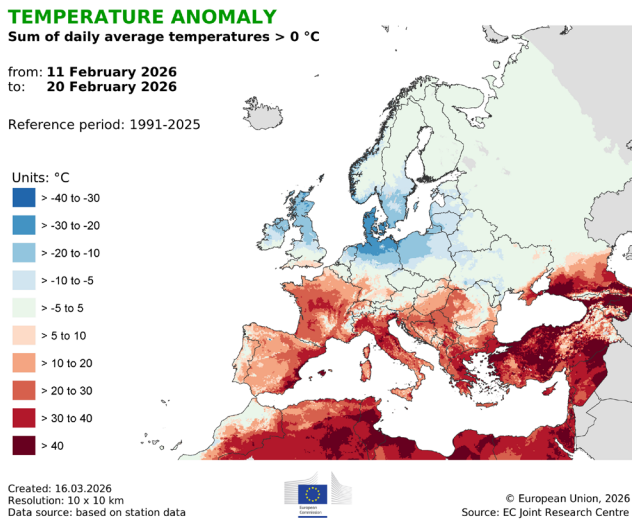
Crop name	Eurostat Crop name	Eurostat Crop Code	Official Eurostat Crop definition*
Total wheat	Wheat and spelt	C1100	Common wheat (*Triticum aestivum* L. emend. Fiori et Paol.), spelt (*Triticum spelta* L.), einkorn wheat (*Triticum monococcum* L.) and durum wheat (*Triticum durum* Desf.).
Total barley	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).
Rapeseed	Rape and turnip rape seeds	I1110	Rape (*Brassica napus* L.) and turnip rape (*Brassica rapa* L. var. *oleifera* (Lam.)) grown for the production of oil, harvested as dry grains.
Sugar beet	Sugar beet (excluding seed)	R2000	Sugar beet (*Beta vulgaris* L.) intended for the sugar industry, alcohol production or renewable energy production.
Potatoes	Potatoes (including seed potatoes)	R1000	Potatoes (*Solanum tuberosum* L.).
Sunflower	Sunflower seed	I1120	Sunflower (*Helianthus annuus* L.) harvested as dry grains.
Soybeans	Soya	I1130	Soya (*Glycine max* L. Merril) harvested as dry grains.
Field beans	Broad and field beans	P1200	All varieties of broad and field beans (*Faba vulgaris* (Moench) syn. *Vicia faba* L. (partim)) harvested dry for grain, including seed.
Field peas	Field peas	P1100	All varieties of field peas (*Pisum sativum* L. *convar. sativum* or *Pisum sativum* L. *convar. arvense* L. or *convar. speciosum*) harvested dry for grain, including seed.
Rice	Rice	C2000	Rice (*Oryza sativa*, L.).

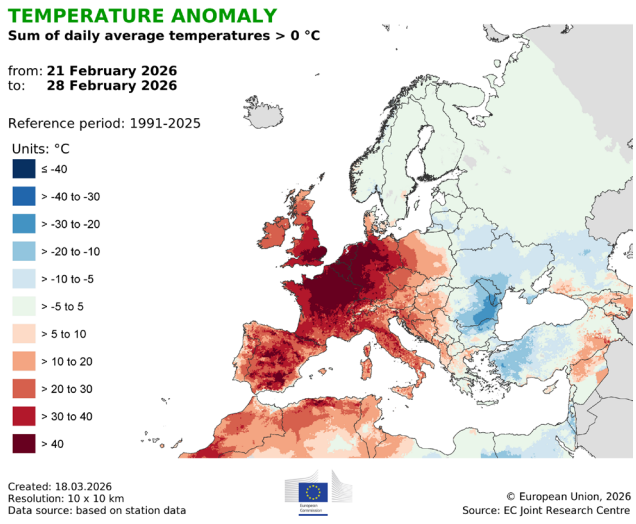
** Source:* Eurostat - Annual crop statistics (Handbook 2020 Edition)

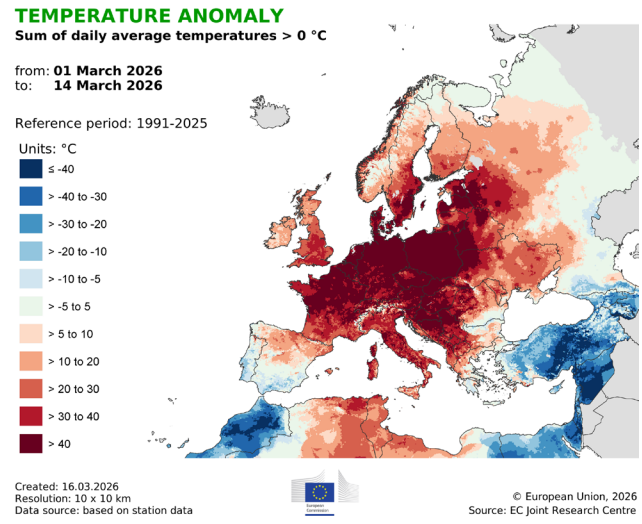
6. Atlas

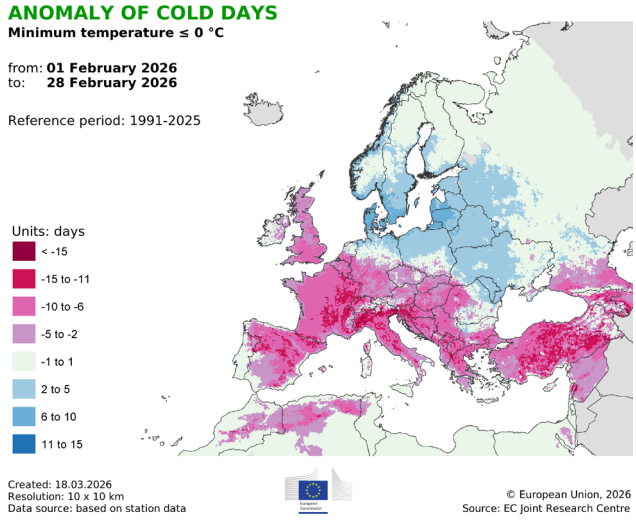
Temperature

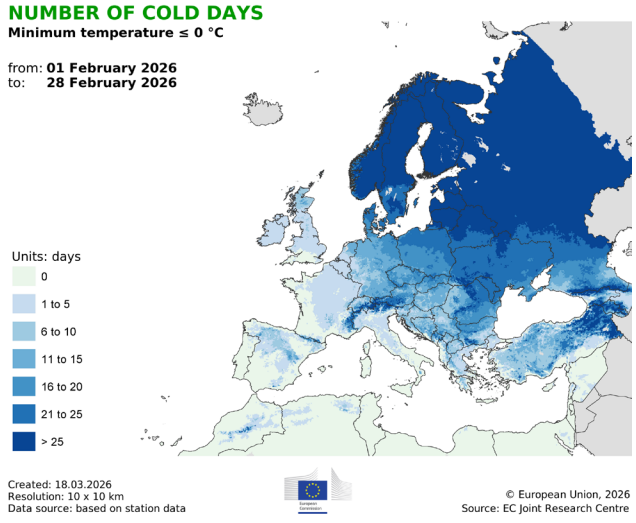


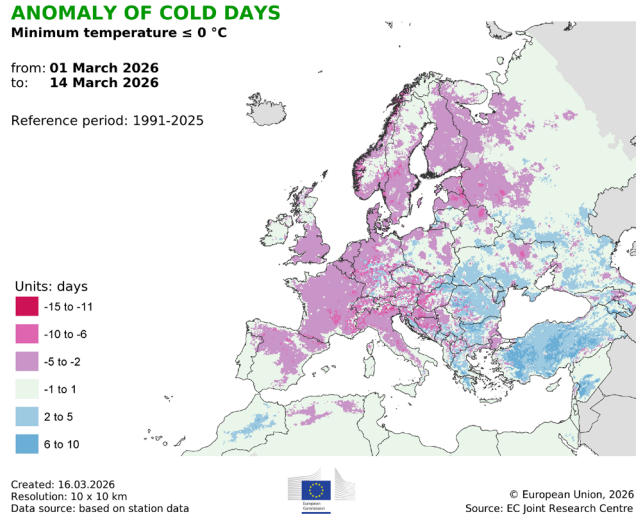


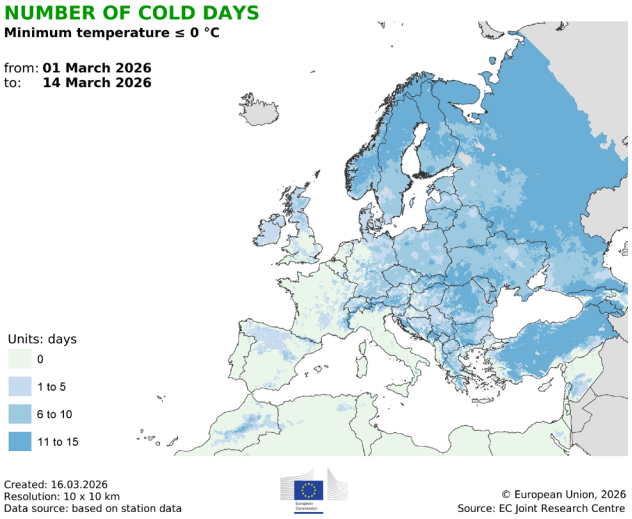




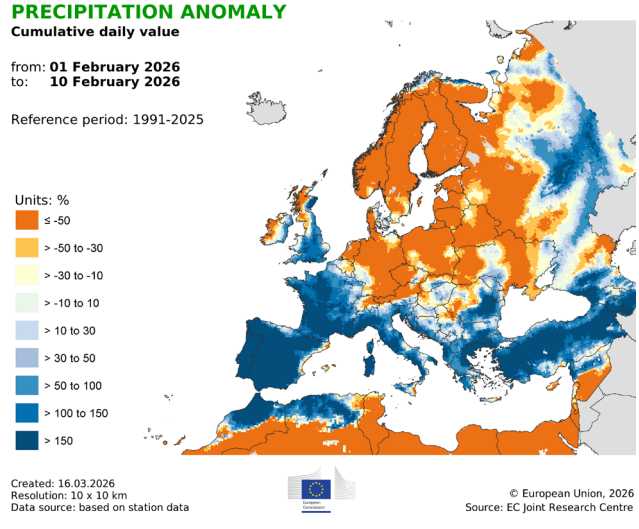


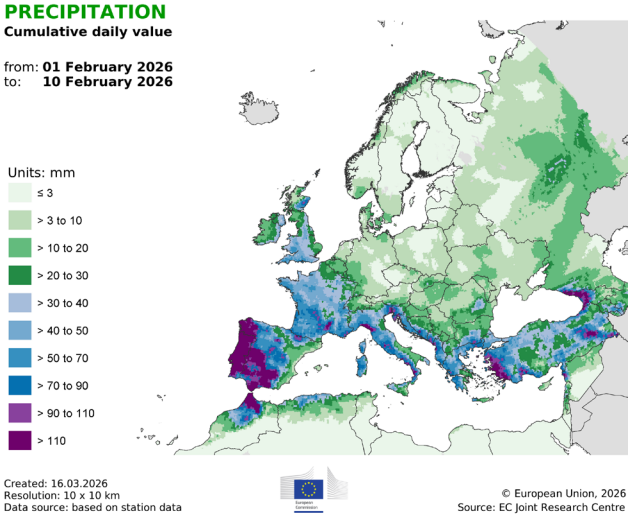


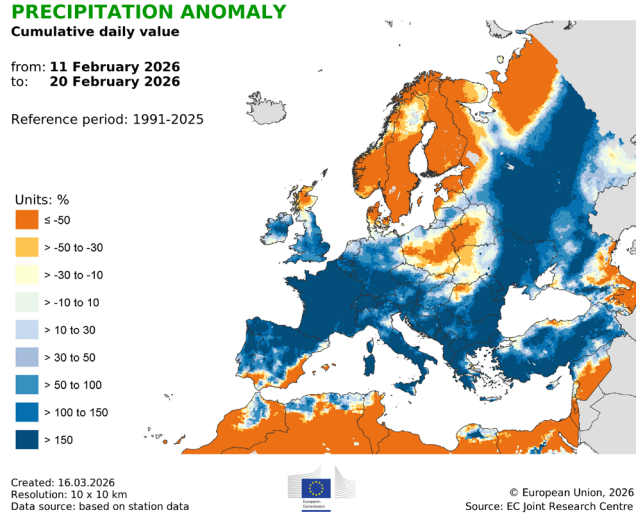


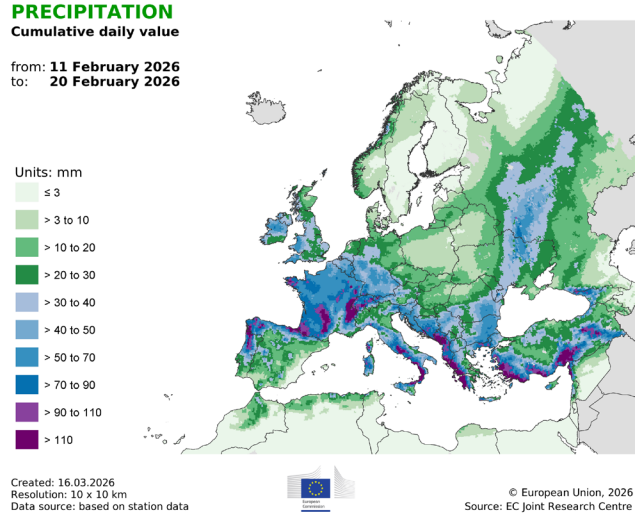


Precipitation







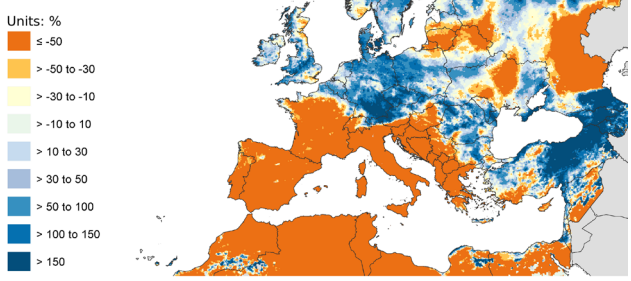


PRECIPITATION ANOMALY

Cumulative daily value

from: **21 February 2026**
to: **28 February 2026**

Reference period: 1991-2025

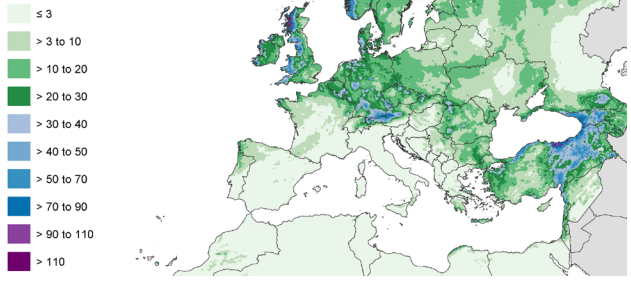


Created: 16.03.2026
Resolution: 10 x 10 km
Data source: based on station data

PRECIPITATION

Cumulative daily value

from: **21 February 2026**
to: **28 February 2026**



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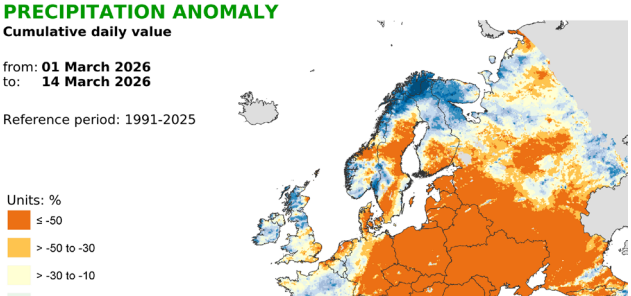
Resolution: 10 x 10 km
Data source: based on station data

PRECIPITATION ANOMALY

Cumulative daily value

from: **01 March 2026**
to: **14 March 2026**

Reference period: 1991-2025



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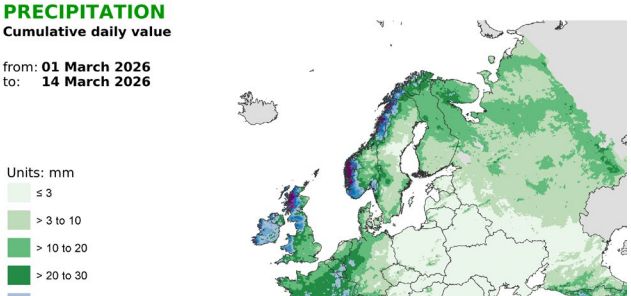
Data source: based on station data

PRECIPITATION

Cumulative daily value

from: **01 March 2026**
to: **14 March 2026**



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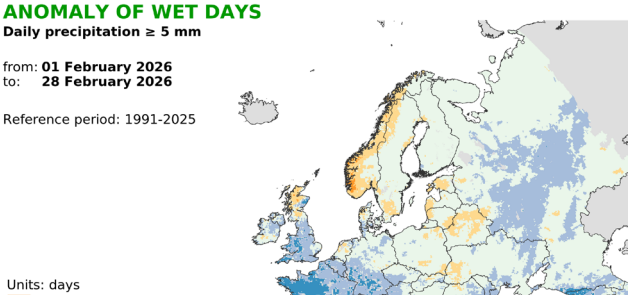
Resolution: 10 x 10 km
Data source: based on station data

ANOMALY OF WET DAYS

Daily precipitation ≥ 5 mm

from: **01 February 2026**
to: **28 February 2026**

Reference period: 1991-2025



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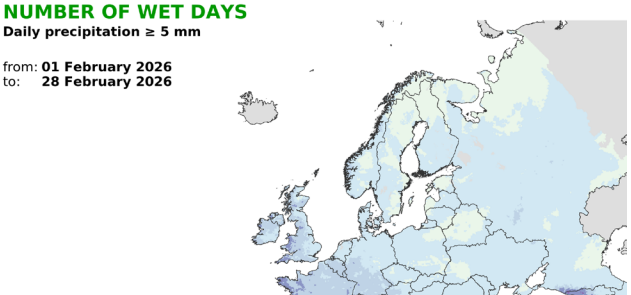
NUMBER OF WET DAYS

Daily precipitation ≥ 5 mm

from: **01 February 2026**
to: **28 February 2026**



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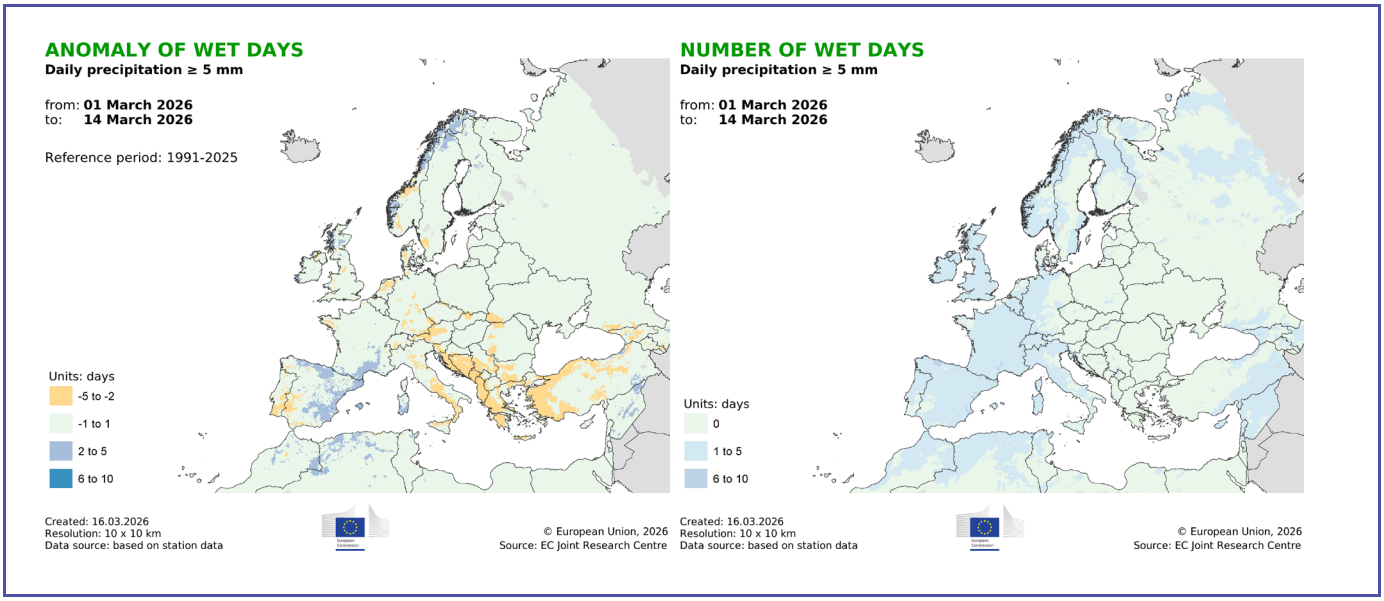

JRC MARS Bulletin 2026

Date	Publication	Reference
2 MAR	Agro-meteo incl. frost-kill analysis, extended Maghreb section	Vol. 34 No 1
23 MAR	Agro-meteo incl. frost-kill & country analysis, yield forecasts	Vol. 34 No 2
27 APR	Agro-meteo & country analysis, yield forecasts, sowing conditions, remote sensing & grassland update, extended Türkiye section	Vol. 34 No 3
18 MAY	Agro-meteo & country analysis, yield forecasts, sowing conditions, remote sensing & grassland update, extended Maghreb section	Vol. 34 No 4
22 JUN	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update, rice analysis	Vol. 34 No 5
27 JUL	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update	Vol. 34 No 6
24 AUG	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update	Vol. 34 No 7
28 SEP	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update, rice analysis, extended Türkiye section	Vol. 34 No 8
26 OCT	Agro-meteo & country analysis, yield forecasts, remote sensing & grassland update, sowing conditions	Vol. 34 No 9
23 NOV	Agro-meteo analysis, sowing conditions	Vol. 34 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 1991-2025. The medium-term average (MTA) used within this Bulletin as a reference is calculated based on weather data from 2016-2025.

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